

**REPORT**

**OF THE**

**WESLEY COLLEGE REVIEW GROUP**

**JANUARY 2010**

## REPORT OF THE WESLEY COLLEGE REVIEW GROUP

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## SECTION 1: INTRODUCTION AND EXECUTIVE SUMMARY

- 1.1 The report *Future Use and Configuration of Training Institutions 2006*<sup>1</sup> prepared by the Training Strategy and Resources Executive ('TSRE') and presented to the 2006 Methodist Conference, made proposals for the future use and configuration of training institutions. The report's main proposals were not adopted by the Conference. Instead, the Conference remitted the proposals to the Methodist Council and instructed the Council to undertake further work on the proposals, to appoint a review group to undertake that task and 'to bring a new, reasoned and objective set of proposals to the Conference of 2007'.
- 1.2 A review group was duly set up. Its report, *Talking of God, Acting for God: Report of the Training Institutions Review Group*<sup>2</sup>, was presented to the 2007 Methodist Conference. So far as the future of Wesley College, Bristol ('the College') is concerned, both the 2006 and the 2007 reports proposed that the College should normally no longer receive students for full-time pre-ordination training.<sup>3</sup> The proposals set out in the 2007 report were adopted by the Conference.
- 1.3 One of the key drivers for the proposals set out in the 2006 and 2007 reports was the need to reduce the initial training budget as part of the process of reducing the expenditure of the Connexional Team by 30%. The consequence of the proposals, so far as the College is concerned, has been to increase the pressures upon its own financial position to such an extent that its continuing viability – or, at the very least, its continuing viability in its present form – has been brought into question. This led the Strategy and Resources Committee ('SRC') to determine that there should be a review of the College.
- 1.4 The terms of reference for the Review Group, agreed between the SRC and the College, set out the aim of the Review in these terms<sup>4</sup>:
- 1.1 To bring to the Methodist Council in April 09 a proposal for the future of Wesley College which:
- (a) enables it to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network, in an affordable and sustainable form:

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<sup>1</sup> 2006 Conference Agenda p.383

<sup>2</sup> 2007 Conference Agenda p.156

<sup>3</sup> Although the 2007 report refers to 'pre-ordination training', in current usage the expression now used is 'initial ministerial learning'. That is the expression that will be used throughout the remainder of this report.

<sup>4</sup> The full terms of reference are set out in Appendix 1 to this report.

- (b) identifies in general or specific terms the geographical location and context of the College and its institutional form [e.g. buildings, assets, staffing, resource-facilities] – having thoroughly reviewed and costed a range of reasonable options;
- (c) recommends the key partnerships which are to be sustained, developed or initiated for the College to fulfil its mission.’

This report sets out the work undertaken by the Review Group, the options it has considered, and the conclusions it has arrived at.

- 1.5 There was slippage in the time taken to set up this Review Group. The Review Group was not finally assembled until February 2009. This, in turn, has meant that it was not possible for us to comply with the requirement to report to the Methodist Council in April 2009. At its meeting in March 2009 the SRC extended to October 2009 the time for delivery of our report. The time was subsequently further extended to January 2010.
- 1.6 The Review Group has met three times. Prior to each plenary meeting, tripartite meetings were held comprising the Chair, Siôn Rhys Evans and James Wisheart. Latterly much of the work of the Review Group has been conducted by e-mail, including by means of exchanged written submissions.
- 1.7 In conducting this review we have regarded the need for transparency to be an overriding imperative. Conscious of current guidance on confidentiality<sup>5</sup> we decided at the outset that the work undertaken by the Review Group should not be regarded as confidential.
- 1.8 Wesley College, as the successor to Didsbury College, Manchester (founded in 1842) is the oldest theological college in world Methodism. It is now the only theological college for initial ministerial learning under the immediate governance of the Methodist Council and whose site is under the exclusive ownership of the Methodist Church in Great Britain. It is appropriate that our proposals should acknowledge the College’s history. Section 2 provides a brief history of the College and outlines the arrangements for its governance.
- 1.9 The need for the present review arises directly from the impact upon the College of the proposals set out in the 2007 report. In the context of this review it is helpful to understand the reasoning which underpinned those proposals and the Conference’s

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<sup>5</sup> See *With Integrity and Skill: Confidentiality in the Methodist Church*, 2008 Conference Agenda pp. 138 to 175 at p. 169 para. 12.10

expectations of the College's future role as a training institution. This is discussed in Section 3.

- 1.10 As noted earlier, the terms of reference for this review require that proposals be made which will enable Wesley College 'to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network'. We are also required to recommend 'the key partnerships which are to be sustained, developed or initiated for the College to fulfil its mission'. Section 4 describes the work of Wesley College today, including its work as the 'core institution' for the South and South-West Regional Training Network, and the key partnerships in which it is currently engaged.
- 1.11 The terms of reference also require that in undertaking the review, the Review Group should 'consult widely and especially to include in their consultation the College Principal, the College staff, the Wesley College Council, the S & SW Training Forum, the University of Bristol and other existing ecumenical and educational partners, the Chair of the TSRE and the relevant staff in the Connexional Team'. Section 5 sets out an outline of the responses received from those who have been consulted.
- 1.12 Determining and evaluating the range of options for the future of the College requires that there must first be a robust assessment of the present financial state of the College. Section 6 addresses the current finances of the College.
- 1.13 It is implicit in our terms of reference that we should consider not only the future of the College but also the future of the site and buildings which have been home to the College for the last sixty years. Issues relating to the site and buildings are addressed in Section 7.
- 1.14 Our primary task has been 'to bring to the Methodist Council...a proposal for the future of Wesley College'. In the process of determining what that proposal should be, the Review Group was also charged to thoroughly review and cost 'a range of reasonable options'. The options considered are reviewed and assessed in Section 8.
- 1.15 The Review Group has concluded that there is only one viable option if the College is to continue in being. That option involves the sharing of the present site with the Bristol Baptist College with the longer-term possibility of eventual organic union of the two colleges, the relocation onto the College site of the services currently provided by Methodist International House, Bristol, and the development of the existing Conference Centre. The Review Group recommends that an Implementation Committee be set up to further explore and, if achievable, implement that option. .

- 1.16 The Review Group has been assisted by a significant number of people as it has researched and written up this review. Those we have approached have given willingly of their time, their knowledge and their skills. To each of them we offer our grateful and sincere thanks.
- 1.17 The membership of the Wesley College Review Group comprised:  
Clifford Bellamy (Chair), *Presbyter and Circuit Judge*  
Christine Stones, *Member of the Wesley College Council*  
James Wisheart, *Secretary of the Wesley College Council*  
Martin Broadbent, *Presbyter and member of the Wesley College Council*<sup>6</sup>  
Siôn Rhys Evans, *a member of staff in the Discipleship and Ministries Cluster of the Connexional Team*  
Gareth Hill, *Presbyter and member of the Strategy and Resources Committee*  
Richard Lindsey, *retired Chartered Public Finance Accountant and lately District Treasurer for the Sheffield District*

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<sup>6</sup> Martin Broadbent was indisposed for the first two meetings of the Review Group and Ward Jones, *Presbyter, Chair of the Bristol District and Chair of the Wesley College Council*, attended in his place.

## **SECTION 2: THE HISTORY OF WESLEY COLLEGE**<sup>7</sup>

- 2.1 Wesley College, Bristol, is now the only theological college for initial ministerial learning under the immediate governance<sup>8</sup> of the Methodist Council and whose site is under the exclusive ownership<sup>9</sup> of the Methodist Church in Great Britain. Although the history of the College in Bristol goes back only to 1946, the history of the institutions which came together to form the College go back more than a century earlier.

### **The roots of the College**

- 2.2 All structured ministerial training in Methodism derives from the 1833 Conference decision to appoint a committee ‘to arrange a plan for the better education of our preachers’.<sup>10</sup> Resolutions based on the report of that committee were discussed at the 1834 Conference, which decided that ‘The Wesleyan Institution for the improvement of the Junior Preachers’ be established as soon as possible.<sup>11</sup>
- 2.3 The first premises rented for the Institution, in 1834, were in Hoxton. The building proved to be too small. Additional accommodation was sought in nearby Abney House, Stoke Newington. This was not a long-term solution. Steps were taken to find a permanent site. The 1839 Conference agreed to use monies from the Wesleyan Centenary Fund<sup>12</sup> towards a new building in London, while also looking ‘for a situation suitable for the purposes of an Institution House, in the neighbourhood of Manchester’.<sup>13</sup> Professor Kent records that<sup>14</sup>

‘The Centenary Fund...provided £71,000 with which to build a northern ministerial seminary at Didsbury, Manchester, in 1842, and a southern seminary at Richmond, Surrey, in 1843, which could take one hundred students between them.’

The colleges at Didsbury and Richmond, together with later-acquired colleges, (Wesley College at Headingley (1868) and Handsworth College in Birmingham (1881)) were all held to be branches of the ‘Wesleyan Theological Institution’.

- 2.4 In October 1940 Didsbury College was requisitioned for a military hospital and was, in consequence, closed to students. Even before that closure, the future of Didsbury

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<sup>7</sup> Thanks are due to the present college librarian, Michael Brealey, for providing background information concerning the College’s history.

<sup>8</sup> Issues of governance are considered at paragraphs 2.20 to 2.23.

<sup>9</sup> Issues relating to ownership of the site and buildings are dealt with in Section 7.

<sup>10</sup> Minutes of the Methodist Conference, 1833, p. 298

<sup>11</sup> Minutes of the Methodist Conference, 1834, p.411

<sup>12</sup> According to the *Dictionary of Methodism in Britain and Ireland* (ed. John Vickers, Epworth Press, 2000) the Wesleyan Centenary Fund was organised in 1838 to mark the first Methodist societies in 1739.

<sup>13</sup> Minutes of the Methodist Conference, 1839, p. 512

<sup>14</sup> Kent, Professor J, in *A History of the Methodist Church in Great Britain* Vol 2, p. 227, (1978) Epworth Press

College had been under review as a result of the over-provision of training places in Manchester following Methodist Union in 1932.<sup>15</sup> The decision was taken not to re-open Didsbury College after the war, but to transfer it ‘with its name, endowments and traditions to Bristol’.<sup>16</sup>

- 2.5 The trustees of the Ministerial Training Fund decided that Didsbury College should be sold. The proceeds of sale were deposited in the newly-established ‘New Didsbury Fund’ and the monies in that account were used to purchase a building on a 22-acre site at Henbury Hill, Bristol.<sup>17</sup> The Henbury Hill site and building cost £15,000. The sale and purchase were completed in 1945. The building began to receive students in April 1946.
- 2.6 This first Didsbury College, Bristol (as it was then known) was a modest Georgian House on the edge of a moderately sized estate which gave scope for expansion. The building was inadequate. By 1949 plans were in hand for a completely new building comprising a college with space for sixty single students, common rooms and a chapel. The new building was constructed at a cost of £117,500.<sup>18</sup> The foundation stone was laid in September 1951 and the work completed in January 1953. The Didsbury coat of arms (granted in December 1946) crested the main entrance.
- 2.7 The original Georgian house was at first retained. Eventually converted into accommodation for married students, this building was sold in 1984. The proceeds of sale were used to meet the cost of erecting a new building on the site. This new building, Frances Greeves House<sup>19</sup>, provided the higher standard of married accommodation which was, by then, much needed. The practice of selling off part of the site to fund capital developments has been repeated.<sup>20</sup>

### **Connexional training strategies**

- 2.8 By the late 1960s it was clear that the Church neither had the need for, nor the resources to maintain, the training institutions then providing initial ministerial learning for Methodist students. In the context of the present review, observations on the Conference’s policy on training, made by a revered Methodist scholar and former Principal of the College (the Revd Rupert Davies), bear repetition. He wrote<sup>21</sup>

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<sup>15</sup> There were then three training institutions in Manchester.

<sup>16</sup> Annual Report of the Ministerial Training Fund of the Methodist Church, 1943-44, p.1. The Report goes on to say ‘Thus the oldest Methodist College becomes the pioneer of a new enterprise in the founding of a College in the West of England, with Bristol as its home’.

<sup>17</sup> For a fuller discussion of the New Didsbury Fund see paragraph 6.7 below.

<sup>18</sup> Again this was met from the New Didsbury Fund – see paragraph 6.7 below.

<sup>19</sup> Frances Greeves was the wife of the Revd. Frederic Greeves, a former Principal of the College.

<sup>20</sup> This is discussed in more detail in Section 6 below.

<sup>21</sup> Davies, R, in *A History of the Methodist Church in Great Britain* Vol 3 pp. 386-387.

‘The training of the ministry entered a very troubled patch of its history in the late 1960s. On the one hand, a great advance had been made, and was being consolidated, in the employment of modern educational methods and the gradual abandonment of the idea that an academic, or semi-academic, training, in the Bible (preferably in the original languages), church history, and systematic theology, together with a strict devotional discipline, and a little pastoral and homiletic instruction, was all that was needed...But, on the other hand, progress was constantly hampered by economic and other problems arising from the shortage of candidates for the ministry, by steeply rising costs, and by frequent and meteoric changes in Conference policy about the closure and location of Colleges...’

- 2.9 The Conference was of the view that one of the training institutions needed to close. The choice facing the Conference was between Wesley College, Headingley and Didsbury College, Bristol. Bristol survived. In 1967, Wesley College, Headingley was merged with Didsbury College, Bristol. The merged college adopted the name Wesley College, Bristol, retaining the right<sup>22</sup> (as the continuing legal entity) to use the coat of arms granted in 1946 to Didsbury College. The premises previously occupied by Wesley College, Headingley, were sold. The proceeds of the sale were used to fund a connexional ‘Colleges and Building Extension Fund’ – part of the connexional Ministerial Training Fund, under the control of the connexional Ministerial Training Committee.<sup>23</sup> Expenditure from the Colleges and Building Extension Fund funded new building on the Bristol site.<sup>24</sup> The existing chapel was converted into a library (and is still used as such), and a new tutorial block built, which became known as ‘the Headingley Building’.
- 2.10 Davies says that this arrangement ‘though painful to many, was successful’.<sup>25</sup> That may have been his perception of the 1960s when writing in the early 1980s<sup>26</sup>, though the ‘meteoric changes in Conference policy about the closure and location of Colleges’ had persisted well into the 1970s. Within three years of the merger of Wesley College, Headingley and Wesley College, Bristol, the Conference had in 1970 appointed a ‘Commission on the Future of Wesley College, Bristol’. The terms of reference of the Commission were:

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<sup>22</sup> Informal advice by the College of Arms

<sup>23</sup> Report of the Committee for Ministerial Training, Conference Agenda 1969, p.48

<sup>24</sup> Report of the Committee for Ministerial Training, Conference Agenda 1971, p.18

<sup>25</sup> *A History of the Methodist Church in Great Britain*, p.387

<sup>26</sup> Perhaps the result of his own affection for the College, he having been the Principal of the College from 1967 to 1973

‘To Consider, and if possible prepare, a scheme for the effective and financially viable use of the Wesley Bristol building by our Church for the purpose of training, ministerial and otherwise; and to report to the Conference of 1971.’

2.11 The Commission considered four possible schemes for the future of Wesley College. Its conclusions were that

‘From the premises on which we have worked we have been forced to conclude that none of the schemes we have examined is effective or financially viable. We therefore have no alternative but to report to the Conference that no scheme under our terms of reference is possible. We have come to this conclusion with disappointment – perhaps even despondency – and regret...To be compelled to give up all this is a tragedy, and we are not surprised that there are people who contend that it should not be done’<sup>27</sup>

2.12 Notwithstanding that recommendation, and although the process of rationalisation of training institutions continued, once again Wesley College was spared. Davies describes what happened<sup>28</sup>:

‘In 1971, Handsworth College, Birmingham, was merged with the Anglican foundation of Queen’s College to form the new Queen’s College...In 1972, Richmond College, Surrey...disappeared. Meanwhile the Conference seemed entirely unable to decide between Wesley College, Bristol and Hartley Victoria College, Manchester, as the final candidate for closure...Feelings ran high on both sides throughout the ministerial section of the Church, and many lay people were also passionately involved. In the end, the Conference of 1972 decided by a majority – the vote by show of hands was a tie and a further vote was taken by ballot – to close Hartley Victoria and develop Wesley. Since then...matters have progressed peacefully...’

2.13 That peace lasted for a quarter of a century until 1998. The 1997 Conference authorised investigation of the cost and effect of closing training institutions. That led, in 1998, to a report presented to the Conference under the title ‘Connexional Training Strategies’. That report argued strongly against closing training institutions, stating that<sup>29</sup>

‘The effects of complete withdrawal from any of our current centres would be to make the strategies outlined in this report unworkable.’

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<sup>27</sup> The Report goes on to describe in glowing terms ‘all we now possess at Bristol...’

<sup>28</sup> *A History of the Methodist Church in Great Britain*, p.387

<sup>29</sup> 1998 Conference Agenda p. 605

- 2.14 Later that year Wesley College itself undertook an internal review of its work and prepared a policy document for the Methodist Council. The policy document considered eight possible options for the future of the College including the possibility of closing the College. The policy document acknowledged that
- ‘If the College is to remain on the present site either income must be increased or major cuts in running costs achieved. Without these the site will have to be vacated.’
- 2.15 The TSRE, in a report presented to the Methodist Council in April 1999, referred to the ‘far-reaching and imaginative proposals submitted by the Council of Wesley College, Bristol’. It went on to analyse the problem which had to be faced. It is worth setting out the TSRE’s analysis in some detail. It said
- ‘The connexion could not do without a resource centre for theological education and training serving Bristol and the surrounding regions. It would seriously undermine our strategies for the provision of training if there were no such centre south and west of Birmingham and Oxford.
- ‘At the same time, the connexion cannot afford to maintain Wesley College, Bristol at all costs. To do so would undermine our strategies for the provision of training in other regions.
- ‘It is important to make a distinction between the resources which need to be provided and the site, buildings and personnel in which they are currently embodied.
- ‘It is imperative that the historical and contemporary resources of the Wesley College library and a community of scholarship and training be maintained and renewed...’
- 2.16 The members of the present Review Group do not dissent from most of the observations made in the Wesley College Council policy document (paragraph 2.14 above) or those made in the TSRE report (paragraph 2.15 above). These are issues with which we shall endeavour to engage later in this report.
- 2.17 Of all of the changes in Connexional Training Strategies approved by the Conference over the last thirty years, those approved in 2007 have had the most profound impact upon Wesley College, Bristol. We consider those changes in the next Section.

### **Heritage Collection and Special Collections**

- 2.18 No review of the history of Wesley College would be complete without reference to its Heritage Collection and Special Collections (referred to hereafter as the ‘Heritage Collection’). The College is home to a Heritage Collection comprising some 4,000 printed items, general and Methodist, with 3,000 texts dated between 1730-1850. Most of these items originated from the Didsbury and Headingley libraries. The most important

printed volumes come from Didsbury, including books given to the library there in the nineteenth century by the Revd James Everett, J.D. Fernley, and the Revd W. B. Pope. The collection also has many editions of works by the Wesleys. Some of these are of special note, such as John Wesley's annotated copy of his *Primitive Physick*. The extensive Methodist tract and pamphlet collection donated to Didsbury by the Revd S. R. Hall is of considerable importance.

- 2.19 Manuscripts and artefacts provide a further 2,000 items. These are mainly Methodist-related and include some of the most important documents of early Methodism. Most were collected by the Revd George Morley of Leeds and his son (also George), and were donated to Headingley College by the widow of George junior in 1880. This collection includes items which were originally in the hands of Dr Adam Clarke, a close associate of John Wesley. There are also a small number of artefacts and curiosa including paintings of John Wesley and Susanna Wesley.<sup>30</sup>

### **Governance**

- 2.20 The move to Bristol in 1945 was apparently the first occasion on which issues of governance and legal status arose. The Minutes of Conference for 1946 record formal resolutions by which the Trustees for Methodist Church Purposes ("TMCP") and the Ministerial Training Committee declared that 'all powers of management of the following Foundations [Didsbury College, Richmond College, Headingley College, Hartley Victoria College and Handsworth College] shall be exercised by the Ministerial Training Committee'.<sup>31</sup>
- 2.21 Under the terms of a Trust Deed executed on 8<sup>th</sup> January 1946, the land and buildings occupied by the College are held on trust by the TMCP as Custodian Trustees with the Methodist Council (as the successor to the Ministerial Training Committee) acting as Managing Trustees.<sup>32</sup> Since 1996 the day to day discharge of the Methodist Council's responsibilities as Managing Trustees has been delegated by the Methodist Council<sup>33</sup> to

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<sup>30</sup> During his time as Tutor in History, Librarian and Archivist at the College (1978 to 1990), Professor Diarmaid MacCulloch (now Professor of the History of the Church in the University of Oxford) catalogued the archive collection and supervised the restoration of many of the more ancient texts.

<sup>31</sup> Minutes of the Annual Conference of the Methodist Church, 1946, p.29

<sup>32</sup> Issues relating to the land and buildings are dealt with in Section 7.

<sup>33</sup> The minutes of the Methodist Council held on 2<sup>nd</sup>/3<sup>rd</sup> October 1996 record that the Methodist Council 'delegates its functions in relation to properties for which it is responsible as set out in clauses 1 to 9 below...' Clause 2 is headed 'To the Committee for Wesley College Bristol' and reads 'The management of the college property and staff and student accommodation held on the Trust Deed of 8<sup>th</sup> January 1946, subject to the provisions of that Deed'. The most recent formulation of this delegation of powers is to be found in a resolution passed by the Methodist Council in October 2007 which provides that: 'The Methodist Council resolves that all powers of management are hereby delegated to the College Council,

the Wesley College Council.<sup>34</sup> It is important to make the point that this is a delegation of powers and not a divesting of responsibility.

2.22 The Methodist Council continues to be the Managing Trustees and exercises its oversight and governance responsibilities in a number of different ways:

- (i) The membership of the Wesley College Council includes a representative of the Connexional Team.
- (ii) Copies of the minutes of College Council meetings are routinely sent to the Connexional Team.
- (iii) An annual 'Governance Scrutiny' form should be completed and returned to the Connexional Team.<sup>35</sup>
- (iv) Copies of the College accounts are sent annually to the Connexional Team.
- (v) Every third year a Governance Scrutiny Review should be undertaken by a governance scrutiny trio, which reports to the SRC..

2.23 The first Governance Scrutiny Review took place on 14<sup>th</sup> March 2005.<sup>36</sup> Some of the observations made in the report of that first Governance Scrutiny Review are relevant to our review. In particular, the report observed that

'2. There seemed little prospect of major financial problems over the next year but they are operating in a very tight financial situation with little margin for reserves to cover contingencies...

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save in relation to sales, mortgages, lettings or any other disposition of property, provided the powers of management are exercised in a manner which does not conflict with Standing Orders. For the avoidance of doubt, this includes the power to apply for and obtain a licence in relation to SO 922(3A).<sup>7</sup> The Review Group notes that a Governance Scrutiny Review undertaken by the Methodist Council in 2005 did not raise any compliance issues.

<sup>34</sup> From the documents we have seen, it appears that the Wesley College Council was formed in 1995. An undated minute (there is a manuscript note endorsed on the minute saying 'agreed May 1995') states that 'The College Committee approved the following new structures, and set up a steering group to make appropriate appointments'. The responsibilities of the newly appointed College Council are stated to include the responsibility 'To shape, determine and oversee the fundamental policies and strategies of the college in consultation with the Principal, staff, and students'. The composition of the College Council was to include Connexional officers, namely 'two representatives from the Methodist Church Life Unit'.

<sup>35</sup> This arrangement appears to have been introduced in January 2005. A letter to the College from the then General Secretary of the Methodist Church dated 10<sup>th</sup> January 2005 (a letter which was sent to all institutions for which the Conference and the Methodist Council have ultimate responsibility) says: 'I write on behalf of the Methodist Conference and the Methodist Council. Our understanding is that [the College] is required to report annually to the Council. The Conference and the Council have reviewed their responsibilities as 'parent bodies' and now wish to improve their governance responsibilities in relation to [the college]. To that end I ask you to complete the enclosed pro forma and return it to my office...I realise the weakness of a form which tries to cater for the needs of the many diverse groups for which it is intended...' The 'Governance Scrutiny' form enclosed with that letter is a two-page questionnaire seeking basic information about the College including production of the annual accounts and information as to the current membership of the College Council.

<sup>36</sup> Although the second review should have taken place in 2008 there has not been a second review.

‘3. The Council seemed of the right size, but in view of the challenges they were facing the appointment of new members with business skills and experience of change management was important...

‘5. But the biggest issues for the College were outside their own control. They were that there was little prospect in the foreseeable future of making progress on Hind in the South West because of difficulties between dioceses in the Anglican Church, and the continuing uncertainties about the timing and development of Connexional Training policies...

‘6. They would like to move to a strategic planning process but this was very difficult for them until Connexional training policy was clear...’

### **SECTION 3: THE IMPACT OF CONNEXIONAL TRAINING STRATEGIES**

- 3.1 Decisions of the Conference taken in response to proposals contained in the two reports presented to it in 2006 (*Future Use and Configuration of Training Institutions 2006*) and 2007 (*Talking of God, Acting for God: Report of the Training Institutions Review Group*) have had a profound impact upon the College. Consideration of those reports is appropriate not only in the context of understanding the background to the decisions taken by the Conference but also in the context of understanding the Conference's expectations of the College's future role as a training institution. The reports repay consideration in full. In this Section we provide only a selective overview.

#### **The 2006 report**

- 3.2 The 2006 report was the result of work undertaken by the TSRE, whose terms of reference were 'to develop immediate proposals for the provision of foundation and pre-ordination training in the context of a commitment to the learning and development of the whole people of God'.
- 3.3 The Introduction to the report states that the development of proposals for the future provision of training 'is urgently needed' and proceeds to identify four reasons for that statement:
- 1.2(1) The nature of training for presbyteral and diaconal ministry has changed radically in the last fifteen years, with even more radical changes likely in the future. The Church's structures for training need to be re-shaped to meet future needs.
  - 1.2(2) The five-year period of committed funding of foundation and pre-ordination training from the assessment ends after the connexional year 2006-7. The Connexion must decide how it wants to use its training resources after that date.
  - 1.2(3) Changes in the shape and staffing of ministry reinforce the need to make decisions about presbyteral and diaconal training within the wider context of the ministry of the whole people of God.
  - 1.2(4) It is necessary to reduce the expenditure of the Connexional Team by 30% and the initial training budget (which totals approximately £2.1m at present) must bear its share of that reduction.
- 3.4 The report presents a reasoned and compelling case for change to the Church's structures for training not only on the ground of responding to radical changes in the

nature of training for presbyteral and diaconal ministry but also on the ground of recognising the increasing importance of providing training opportunities more widely for the whole people of God. However, it is clear from the report that these were not the only drivers for change. Another driver for change was the financial imperative to reduce the cost of training. The case for change on financial grounds is equally strongly argued.

- 3.5 Financially, the challenge was to achieve a 30% reduction in the cost of training. The report notes that ‘The Connexion made a five-year commitment, beginning with the connexional year 2002-03, to provide a significant part of the funds for foundation and pre-ordination training by means of a connexional assessment dedicated specifically to that purpose...This special (technically “hypothecated”) assessment...has given stability to the training institutions through a period of great change and uncertainty. The challenge now is to find an affordable way of meeting the Church’s training needs for the future’.<sup>37</sup>
- 3.6 The report makes the point that ‘Persistent memories of times past make it necessary to emphasise that the majority of presbyters and deacons are not now trained full-time in residential communities owned, filled and staffed by the Methodist Church.’ Although that point is well made, it remains the case that there is still a cohort of students who are trained on a full-time residential basis. The report recommended that they be trained at two institutions, Wesley House, Cambridge, and The Queen’s Foundation, Birmingham.
- 3.7 It is necessary to consider in some detail the approach taken by the report in arguing the case for change. It is also necessary to consider what the report has to say about the impact of its proposals. Both of these areas are relevant to our review of Wesley College, Bristol.

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<sup>37</sup> The Review Group notes that the report gave no information concerning the balance held in this Fund at the date of the report. A report in the 2009 Conference Agenda (pp. 273) states that ‘The Training Assessment Fund (“TAF”) was set up in 2002 for a period of five years to provide funding for pre-ordination training across the Connexion. The assessment was based on the 2002 numbers of students as well as allowing for an increase in that number. The TAF accumulated over the five year period as fewer candidates were accepted than even the 2002 levels. This led to the TAF containing a total of around £6m by 2007. In order to further the agreed outcomes of the Training Institutions Review Group report it was decided by the SRC to utilise the TAF to set up the new Methodist Training Forums and make funding available for the creation of centres of Methodist scholarship. This included money for the development of new courses, for postdoctoral research, for the pump-priming of a Student Hardship Fund, as well as to provide money for the running of the Training Networks themselves. It was initially agreed that this funding would be in place for three years, coming to a total expenditure from the TAF of over £3m, leaving a balance of approx. £2.5m in the TAF’. (p. 271). The 2009 Conference rejected a proposal that this Fund should now be undesignated.

3.8 The report considered the possibility of establishing a single institution as the only training institution designated to receive full-time residential students. However, it discounts this possibility, saying that

‘The total number of ministerial students and staff which we have could be combined to form one small institution in educational terms. This centre could provide all the types of teaching we need – distance learning, full-time, part-time and residential – but we believe that this would be too risky a step to take. It would amount to putting all our future educational resources into one basket.’

The report does not attempt to describe or analyse that risk.<sup>38</sup>

3.9 A second objection to a ‘single institution’ approach was the need to have a geographical spread of training networks across the country. The report says that the Church ‘needs to redefine its training resources by geographical area...it is important that the Church can offer training, usually part-time, to those people accepted as candidates who need to remain living in their own area.’ It talks of the need for ‘places where communities of scholarship, accountability and prayer can offer both intellectual and spiritual refreshment and renewal’. It makes the point that the Church ‘will need to incorporate as much as possible of the existing resources of Methodist training institutions into this series of networks so as to provide a robust Methodist presence in all geographical areas.’ The report also goes on to acknowledge that

‘Methodism’s significant physical resources such as libraries and archives<sup>39</sup> have continuing importance in a changing world. Together with the skills and charisms of particular institutions they have connexional and worldwide, as well as regional, significance and the potential to be used in more diverse ways.’

3.10 Although the report did not recommend Wesley College, Bristol, as one of the training institutions which should normally continue to receive full-time, ministerial students, it is clear from the passages referred to above, and from other passages within the report, that there was no suggestion that Wesley College should cease to exist. Indeed, the report

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<sup>38</sup> A briefing paper dated 20<sup>th</sup> April 2006 prepared for a meeting of the Methodist Council on 3<sup>rd</sup> May 2006 acknowledges that ‘It might...seem logical to concentrate all such students in one institution and thus guarantee a viable cohort. There are two main reasons for not doing this: ... (2) In a world where all institutions are subject to some degree of risk in their operation it would expose too large a proportion of Methodist students to such risk. *This is particularly, though not only, applicable to situations where there are important factors outside Methodist control [emphasis supplied].*’ The briefing paper failed to highlight the fact that Wesley College, Bristol, is now the only theological college for initial ministerial learning under the immediate governance of the Methodist Council and whose site is under the exclusive ownership of the Methodist Church in Great Britain.

<sup>39</sup> Throughout the remainder of this report the Review Group has preferred the expression ‘Heritage Collection’ since that accords more with current Methodist usage.

is at pains to state unequivocally that ‘there are no recommendations to close any particular institution.’<sup>40</sup> Re-shaping is necessary and is bound to be painful, especially where resources are limited. This report aims to offer realistic pathways to that re-shaping.’

3.11 That ‘re-shaping’ included a proposal that there should be created eight theological education networks, six for England and one each for Scotland and Wales, each of which was to be serviced by a ‘learning centre’. The report proposed that:

‘Within the network each learning centre will<sup>41</sup>, in consultation and collaboration with other institutions within the network:

- Determine, in conjunction with connexional bodies and officers, the training pathways of all Methodist student ministers within its network through a regional training management committee;
- Exercise oversight of all Methodist student ministers within its network through a regional oversight committee;
- Manage the delivery of training for those students, either directly or through other institutions in its network;
- Oversee and co-ordinate, though not necessarily deliver, vocational exploration groups as proposed in the report ‘*Extending Discipleship and Exploring Vocation (Foundation Training) for the Future*’;
- Play an advisory and co-ordinating role with regard to probationer studies in conjunction with District Probationers Secretaries;
- Offer support to and some delivery of continuing development in ministry;
- Have input into Local preacher training; and
- Offer development and training for lay ministries.’

3.12 Wesley College, Bristol, was to be a learning centre for the South & South West theological education network jointly with the Southern Theological Education and Training Scheme (“STETS”) and the South West Ministry Training Course & Training Scheme (“SWMTC”).

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<sup>40</sup> Another briefing paper prepared for a meeting of the Methodist Council on 3<sup>rd</sup> May 2006 says that ‘It is important to be clear what Council is **not** doing...It is not determining whether institutions should close or not. Each institution will continue to be responsible through its own governance and management structures for determining how it envisages its future’. This briefing paper, too, failed to highlight the point that Wesley College, Bristol, is now the only theological college for initial ministerial learning under the immediate governance of the Methodist Council and whose site is under the exclusive ownership of the Methodist Church in Great Britain

<sup>41</sup> See paragraphs 4.1.1 to 4.2 of the report for a fuller account of the role of a ‘learning centre’.

- 3.13 As part of this ‘re-shaping’ it is also appropriate to note the report’s explicit ‘commitment to the learning and development of the whole people of God’. The report makes it clear that ‘Work on the future of ministerial training cannot be separated from work on the total context of training to support the ministry of the whole people of God’. Reference is made to the 2001 Conference report *Learning and Developing as the Whole People of God* and to its key principles of valuing the individual, fostering a culture of life-long learning, and enabling the Church to fulfil its mission to engage with the world.
- 3.14 Of central importance to individual institutions was the proposal for future funding. The report proposed that funding by means of per capita fees and block grants should be changed. It proposed that the block grant system ‘be replaced with a system of core funding’. The report says that ‘The removal of block grants and their replacement with core funding will reduce the cost of initial training and ensure a fair distribution of resources across the learning centres.’ It provides reassurance that ‘Further moneys will be available to the learning centres and their networks from student fees’. In terms of the need for each institution to ensure a balanced budget, the report says that ‘It is anticipated that learning centres will generate other income from the other training they offer.’
- 3.15 The report also makes the point that ‘Some of the current premises<sup>42</sup> that the Connexion supports financially were designed for a form of training and formation which, largely, no longer meets the Church’s needs and is unlikely to meet future needs, and the Church cannot afford to continue to maintain these premises’. As if to reinforce this point, the report states that whereas the block grant related partly to the number of students in training and partly to the core costs of each institution, the block grant’s replacement, ‘core funding’, was ‘not intended to finance the maintenance of buildings’<sup>43</sup>. The report acknowledged that its recommendations would have an impact on those institutions which would no longer normally receive full-time residential students. Although the report provides an illustration of the amount of the potential savings for the Connexion as a result of the change in funding from block grants to core funding, it makes no attempt to consider the impact of the changes in funding on any of the institutions affected. This last point is of particular relevance so far as Wesley College is concerned.

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<sup>42</sup> The report does not indicate which particular premises the TSRE had in mind.

<sup>43</sup> The reasons for the change in policy were not given. The new policy may be reasonable in relation to those institutions whose premises are not owned by the Methodist Church. However, the policy is more surprising in the case of Wesley College given that its premises *are* owned by the Methodist Church. So far as Wesley College is concerned, this new policy has had significant adverse financial consequences. These are considered in Section 6.

## The 2007 report

3.16 The 2006 report acknowledged that its recommendations ‘are bound to provoke controversy’. So they did. The 2006 Conference did not accept several of the report’s main proposals. Resolution 46/3 states that

‘The Conference refers back Section 4 of the Report to the Methodist Council and instructs the Council to

- (1) undertake further work on the proposals outlined in paras. 4.4.1 to 4.5.5.
- (2) appoint a review group, members of which shall have no current direct involvement in any of the centres or institutions named on pages 397/8 of the Agenda<sup>44</sup> to undertake this task.
- (3) bring a new, reasoned and objective set of proposals to the Conference of 2007.’

3.17 A review group was duly set up. Its report states that in the course of the meetings and visits undertaken by members of that review group,

‘the group became even more acutely aware of the demands created by uncertainty and change. They identified the main factors as being the knowledge that the block grant system (and the whole funding régime) is under review, the replacement of foundation training by vocational exploration and the ‘planning blight’ consequent on prolonged uncertainty.’<sup>45</sup>

This observation is of particular relevance to the position of Wesley College since it has been the subject of reviews almost continuously since the process of reviewing training institutions began in 2005.<sup>46</sup>

3.18 Although the 2006 report had expressed the opinion that ‘it is not advisable to support full-time training at more than two learning centres’ the review group concluded that full-time training should take place in three institutions: Wesley House, Cambridge, The Queen’s Foundation, Birmingham and Wesley Study Centre, Durham.

3.19 As with the 2006 report, the 2007 report does not consider the impact of its proposals on the institutions affected and in particular, given its status as the only theological college for initial ministerial learning under the immediate governance of the Methodist

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<sup>44</sup> At the relevant time, members of staff from two of the centres and institutions concerned were both members of TSRE and also members of the TSRE sub-group which produced the report *Future Use and Configuration of Training Institutions 2006*.

<sup>45</sup> 2007 Conference Agenda p.159

<sup>46</sup> This point has also been made to us by some of those with whom we have consulted. For example, Russell Buley, chair of the Methodist Training Forum in the South & South-West Regional Training Network, said in his written submission: ‘I have seen the levels of anxiety that have been endured by staff and students of our training institutions as a result of a prolonged period of uncertainty over their roles within the future configuration of Methodist training.’

Council and whose site is under the exclusive ownership of the Methodist Church, the impact of its proposals upon Wesley College, Bristol.

- 3.20 The 2007 report recommends that there should be five Regional Training Networks<sup>47</sup> in England rather than the six ‘theological educational networks’ proposed in the 2006 report. It gives some explanation as to the intended role of the Regional Training Networks. The report recommends that in each Regional Training Network there should be a Methodist Training Forum. It describes the structure and gives some explanation of the intended role of the proposed forums. It also outlines the responsibilities of the TSRE under the new arrangements. The report provides greater detail than had been provided in the 2006 report so far as the proposed move from block grants to core funding is concerned.
- 3.21 The report also proposed that there should be a ‘core institution’ in each Regional Training Network and that Wesley College, Bristol, should be the core institution in the South & South-West Regional Training Network. The report did not describe the structure or role of a core institution.<sup>48</sup> That presented the members of our Review Group with a difficulty since our terms of reference require us to ‘bring to the Methodist Council...a proposal for the future of Wesley College which...enables it to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network’.
- 3.22 Our terms of reference also require us to consult the SRC ‘on emerging significant themes at any point during the Review’. It became clear to us that there was no comprehensive definition of a ‘core institution’. While allowing a degree of latitude for local interpretation may have been an intention of the authors of the 2007 report, the lack of such a definition caused difficulties for the Review Group given our terms of reference. We highlighted our concerns both to the Chair of the SRC and to the General Secretary of the Methodist Church.
- 3.23 We received some guidance from Mr Doug Swanney, Head of Discipleship and Ministries in the Connexional Team. Mr Swanney made the point that in creating Regional Training Networks, Methodist Training Forums and Core Institutions

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<sup>47</sup> Perhaps a confusing choice of title given its similarity to the ‘Regional Training Partnerships’ proposed by the report of a working party set up by the Archbishop’s Council *Formation for Ministry Within a Learning Church: The Structure and Funding of Ordination Training* (the Hind Report) and accepted by the General Synod in July 2003.

<sup>48</sup> The report also gives very little detail about the new ‘Regional Training Networks’. For example, it gives no guidance as to the oversight responsibilities or accounting mechanisms for Regional Training Networks, or as to the relationships between the Regional Training Networks and their core institutions, or as to the intended relationship between Regional Training Networks.

‘No attempt was made to describe the activities of those institutions, except indirectly, by indicating those areas of work for which the Methodist Training Forums would account to the Methodist Council...The 2007 report did not seek to establish a class of institution (‘core institutions’) whose activities can be defined and whose financial viability is guaranteed by the Methodist Council.’

3.24 Mr Swanney went on to say that

‘it may be unhelpful to see the future of Wesley College, Bristol, exclusively through the prism of its role as a core institution. The major impact of the acceptance of the 2007 report on the College is the decision that the College would not normally receive full-time, bursaried ministerial students...[The] future of the College may be appropriately dependent on a determination of what magnitude of Methodist Training Fund investment in the College site amounts to good stewardship of its limited resources. This determination should precede a determination by the South & South-West Methodist Training Forum about which medium- and long-term regional training needs are to be met by the College’.

3.25 We also contacted the Revd Ian White, Chair of the 2007 Review Group. We are grateful to Mr White for his explanation that the expression ‘core institution’ was intended to be

‘a way of identifying those centres which would resource the Training Regions - a development of the term [learning centres] which would also operate within a given region. This was to be seen in terms of administering the finance for the Region and allocating it as agreed by the Training Forum and the Connexion; allocation of staff including any Training Officers who would be deployed around the Region as agreed by the Forum. The intention being that resources - human and financial - would be made available to the various centres for training for programmes such as EDEV; Local Preacher Training and Development; Worship Leaders; Lay Ministry; Pre Ordination...and such other areas as the Forum had agreed upon.’

3.26 For the purpose of this review we proceed on the basis that the expression ‘core institution’ is to be understood as including the role and structure of a ‘learning centre’, as described in the 2006 report but subject to the refinements indicated by the Chair of the 2007 Review Group (see paragraph 3.25 above).

3.27 It is important to note that, like the 2006 report, the 2007 report also emphasises the importance of the provision of training for the whole people of God. Paragraph 2.1 of the report is of particular importance. It states that the review group’s remit

‘covered a much wider range than the question of full-time pre-ordination training – wider even than the provision of pre-ordination training in all its forms. The institutions through which the Church trains people for ordained ministry already make a significant contribution to learning for the whole people of God and have the potential to do more. The ‘theological colleges and courses’ that used to be regarded as the preserve of those training for ministry are already providing courses followed by people wanting to develop their discipleship and explore their vocation, ministers and local preachers seeking continuing development, members of partner churches training for a variety of ministries and much more...’

3.28 The Chair of that review group has said to us that

‘The report of 2007 needs to be set in context in that we were asked to work to the proposed reduced budget for ‘training’ which included the number of institutions which would provide Full Time Training. Whilst we were looking at ‘pre-ordination training’ we did also focus on training for ‘The Whole People of God’ and that became a key factor in our thinking’.

### **The impact of the 2006 and 2007 reports on Wesley College**

3.29 The combination of the change from block grant to core funding (it having been made clear, as we noted earlier, that the latter is ‘not intended to finance the maintenance of buildings’) and the decision not normally to place full-time ministerial students at the College, has had a significant adverse impact on the College’s income and therefore on its ability to achieve a balanced and sustainable budget.

3.30 In a report prepared by the former General Secretary of the Methodist Church for the Joint Secretaries Group dated 2<sup>nd</sup> March 2008 he said that

‘The 2007 Conference agreed a policy of core funding to ensure the provision of staff in each network, and in particular at the core institutions in those networks...Despite this, the Conference decision not to guarantee a cohort of full-time pre-ordination students at Wesley College means that, from 2008, there is a major reduction in the assured income from the Connexion for Wesley College.’

This was a foreseeable consequence of the recommendations contained in the 2006 and 2007 reports.

3.31 A report prepared for the April 2008 meeting of the Methodist Council, *Nuancing and Implementing the Proposals of the Training Institutions Review Group Report (2007)* acknowledged that there would be a time of transition for some of those institutions adversely affected by the decisions of the 2007 Conference. It made the point that

‘There will...be a need to support those institutions which may experience a sharp drop in pre-ordination student numbers while they adjust to the new situation. This is particularly true of those which previously received students for full-time pre-ordination training and will do so no longer. The 2007 Report, while calling for institutions to be entrepreneurial and responsive to the needs of the Church, did not adopt a “sink or swim” attitude...There will be a need to support existing institutions in the short term while the new shape of things emerges.’

3.32 For a transitional period following the implementation of the decisions taken by the 2007 Conference, compensation was provided to the affected institutions. That compensation was to be provided on a tapering basis over a three-year period. However, it was clear that those additional resources alone would not be sufficient to alleviate the problems experienced by Wesley College.

3.33 A report by the Connexional Team for a meeting of the Methodist Council in October 2008 noted that

1. Wesley College Bristol has suffered a severe drop in the level of its connexional funding for two reasons. (1) Its block grant of £179k in 2007-8 has been replaced by core funding of £72kpa (2) Its average student fee income is likely to fall compared with the last three years by around £65kpa because of the loss of full-time students.
2. In the light of this, SRC in March 2008 agreed extra funding of £21k spread over three years (2008-11), over and above the forms of compensation agreed for other colleges...This was accepted by the April Council...However, at the May SRC...it was reported that there had been confusion about the amounts that were supposed to have been requested from the SRC and it was...felt that, after the background had been checked, the appropriate outcome would probably be to agree a grant of £100k for 2008-9 but no further grants for 2009-11.
3. SRC confirmed on 17<sup>th</sup> September 2008 that a £100k grant should be paid and that this funding was in addition to the funding the college would receive under the standard formulae applied to all Methodist Training Institutions. It was also on the understanding that a review of the college would be undertaken during this Connexional year.

3.34 The College continues to reap the whirlwind of the wind of change<sup>49</sup> blown in by the decisions taken by the 2007 Conference. The present financial position of the College is set out in detail in Section 6 of this report.

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<sup>49</sup> Hosea 8:7

## SECTION 4: WESLEY COLLEGE TODAY

- 4.1 The Review Group's terms of reference require it to bring to the Methodist Council 'a proposal for the future of Wesley College which ... (c) recommends the key partnerships which are to be sustained, developed or initiated for the College to fulfil its mission.' In this Section we outline the College's key partnerships, its mission and its present resources.<sup>50</sup>
- 4.2 The College is situated on a ten acre site to the north of Bristol, five miles from the city centre.<sup>51</sup> The South & South-West Regional Training Network extends from Penzance to the Oxford/Northampton border. The College is located within the most population-dense area of the region. It lies close to the intersection of the M5 and M4 motorways and is therefore served by excellent road links. It is also situated close to Bristol Parkway station and within only 30 minutes of Bristol International Airport.
- 4.3 During the course of this review the Review Group has been reminded on a number of occasions that Bristol is not easily accessible from the more distant parts of the South and South-West Region.<sup>52</sup> That said, relocation of the College to, say, Exeter would lead to it becoming almost exclusively a regional institution since Exeter is more remote from other parts of England. Moreover, travel to Exeter from the Eastern periphery of the South & South-West Regional Training Network would be no easier than travelling from Penzance to Bristol.

### **Context**

- 4.4 As we have already noted, Wesley College, Bristol is now the only theological college for initial ministerial learning under the immediate governance of the Methodist Council and whose site is under the exclusive ownership of the Methodist Church in Great Britain.
- 4.5 The city of Bristol has been designated by the World Methodist Council as a World Methodist Heritage City.<sup>53</sup>
- 4.6 The present work of the College needs to be understood in the context of the Connexional Training Strategies described in the previous section. The implementation

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<sup>50</sup> This is inevitably no more than an overview. More comprehensive information is available on the College's website at [www.wesley-college-bristol.ac.uk](http://www.wesley-college-bristol.ac.uk)

<sup>51</sup> The Review Group has obtained a written informal valuation of the site and buildings from Lambert Smith Hampton, Chartered Surveyors. This will be considered in Section 7.

<sup>52</sup> Bristol to Penzance is a distance of around 185 miles. By comparison, Bristol to Liverpool is a distance of around 180 miles. By rail, the journey time from Penzance to Bristol is around 4¾ hours. By comparison, the journey time by rail from Bristol to Newcastle is around 5 hours. An Ordnance Survey map of the area covered by the South & South-West Regional Training Network appears at Appendix 2.

<sup>53</sup> The College is one of three designated heritage sites in Bristol, the other two being the New Room (the oldest Methodist Chapel in the world) and Charles Wesley's House.

of those strategies has impacted both positively and negatively upon the day to day life of the College.

- 4.7 The positive impact has been the impetus to expand the courses on offer at the College in order to provide training for the whole people of God. Although there has been a reduction in the number of full-time ministerial students as a result of the Conference decision not normally to send such students to the College, there has been an increase in the number of students attending other courses (see paragraph 4.10 below).
- 4.8 The negative aspect of the current Connexional Training Strategies has been their impact on the financial position of the College.<sup>54</sup> The process of attempting to replace the funding lost to the College as a result of the decision of the 2007 Conference by expanding its educational portfolio is an ongoing process. That process has been handicapped by the planning blight referred to in the 2007 report (see paragraph 3.17 above).
- 4.9 In the wider world, Government policy with regard to Equivalent Level Qualifications in the Higher Education sector and the introduction of a points based system (Tier 4) for students coming to study in the UK from outside the EU<sup>55</sup> affect what the College delivers, to whom and how.

### **Student numbers**

- 4.10 Since the academic year 2005-06 the College has sought to extend the range of courses offered and has increased the number of students by over 50%, as the following tables and charts demonstrate. The courses listed and the numbers of students given in the table represent diverse groups, with many variations in the academic demands of the course, the time committed to the course, the duration of the course, the ecumenical background of the students and the fee income generated<sup>56</sup>:

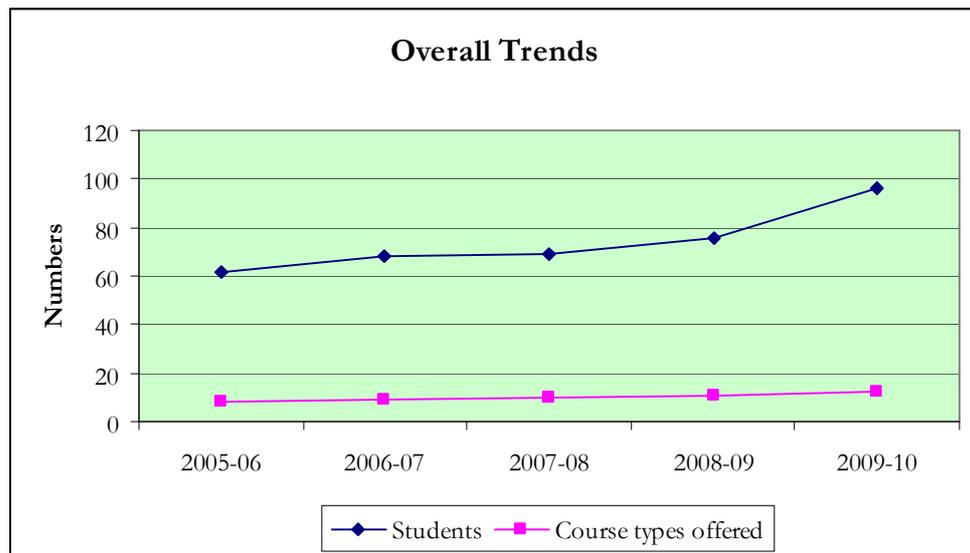
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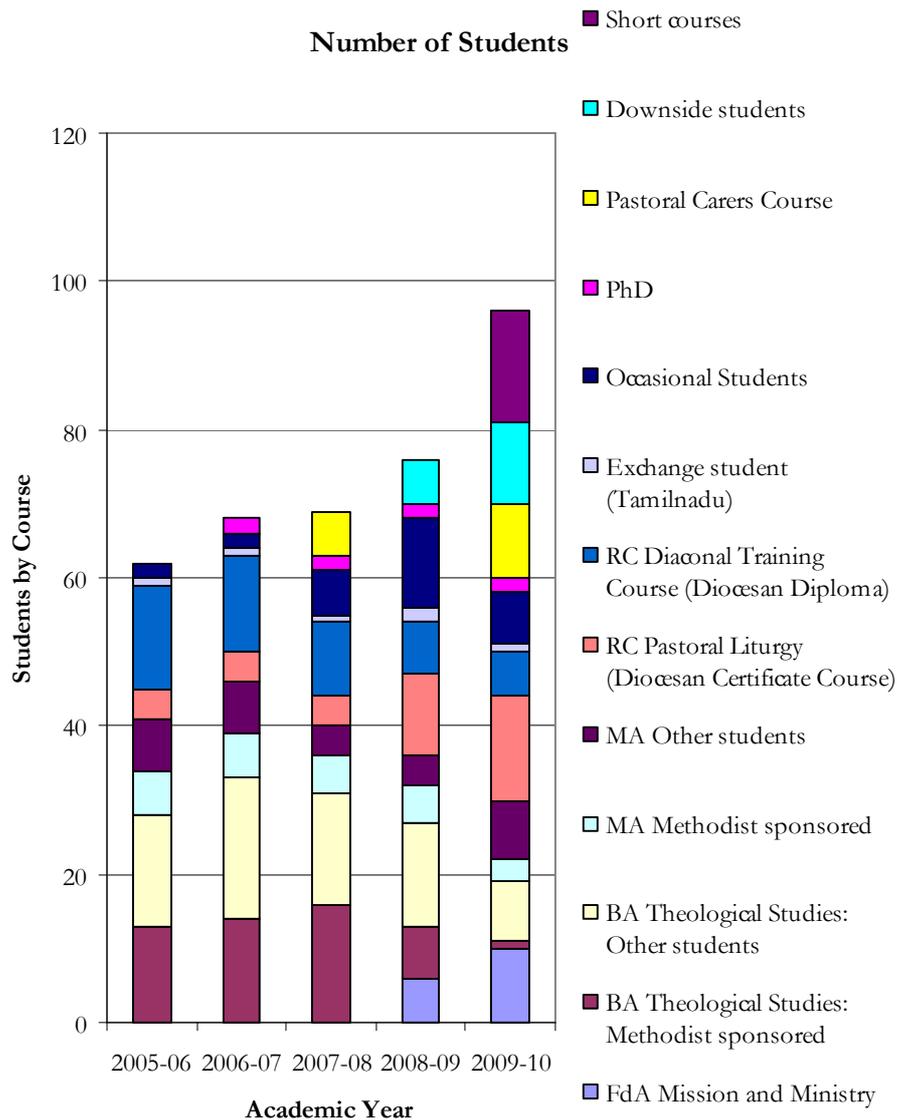
<sup>54</sup> The financial position of the College is considered in detail in Section 6.

<sup>55</sup> This is discussed further at paragraph 5.22 below.

<sup>56</sup> See paragraphs 6.21 and 6.23 below for detailed information on fee income. The former shows how fee income from connexionally-financed students has fallen dramatically, whilst fee income from self-financed students has broadly been maintained. The table at paragraph 6.23 shows these changes as a proportion of total income (that for self-funded students increasing) whereas the chart reveals how dependent the College has become on income other than from fees as a result of the withdrawal of full-time ministerial students. *Prima facie*, these presentations appear inconsistent, but are actually totally consistent. It merits mention that the new (non-degree) courses attract less income per course, so to maintain income the College has to attract proportionately more students.

Course	2005-06	2006-07	2007-08	2008-09	2009-10
FdA Mission and Ministry				6	10
BA Theological Studies: Methodist sponsored	13	14	16	7	1
BA Theological Studies: Other students	15	19	15	14	8
MA Methodist sponsored	6	6	5	5	3
MA Other students	7	7	4	4	8
RC Pastoral Liturgy (Diocesan Certificate Course)	4	4	4	11	14
RC Diaconal Training Course (Diocesan Diploma)	14	13	10	7	6
Exchange student (Tamilnadu)	1	1	1	2	1
Occasional Students	2	2	6	12	7
PhD		2	2	2	2
Pastoral Carers Course			6		10
Downside students				6	11
Short courses					15
	62	68	69	76	96





### Academic partnerships

4.11 The College offers a range of degree courses from first degree through to PhD. These courses are validated by the University of Bristol.<sup>57</sup> The College’s partnership with the University of Bristol is well-established (it began around 30 years ago) and is secure. The

<sup>57</sup> An *Institutional Agreement between the University of Bristol and Wesley College* was executed in July 2007. This is a legally binding Agreement between the College and the University. The Agreement provides that it shall ‘remain in force for five financial years in the first instance’ with a review in the third year. The Agreement sets out the circumstances in which either party may terminate the Agreement. The Agreement states that ‘Arrangements for termination must include provision by the College and the University for existing registered Students to complete their studies...’ The Agreement provides for annual payments from the College to the university, increasing annually and totalling a little over £100,000 over the life of the Agreement. The College is contractually obliged to pay that sum.

academic achievements of the College's students match, and in some cases exceed, those of students at the University at all levels.

- 4.12 In 2008 the College extended its educational portfolio with the addition of a new Foundation Degree (FdA) in Mission and Ministry. This is essentially a vocational, rather than a purely academic, award. A strategic decision was taken to seek a validator with experience of this kind of educational provision. This degree is validated by St. Mary's University College, Twickenham.<sup>58</sup> St Mary's University College has its roots as a Roman Catholic Training College. This is of particular significance in light of the College's own unique relationship with the Roman Catholic Diocese of Clifton (see paragraph 4.14 below).

### **Ecclesiastical and theological partnerships**

- 4.13 The College has a number of ecclesiastical and theological partnerships which are being maintained and developed. Anglican and Baptist partners within the Bristol Federation for Theological Education stand alongside the College's links with local Dioceses (for example, the Church Leadership Course, which is co-badged with the Diocese of Bath and Wells). The College is also developing close relationships with the black-led churches within the Pentecostal and Holiness traditions.
- 4.14 The College is working in formal partnership with the Roman Catholic Diocese of Clifton, providing academic training for clergy within the diocese through the Certificate in Pastoral Liturgy and the Certificate and Diploma in Diaconal Studies. This is a pioneering and unique relationship between a Methodist education provider and the Roman Catholic Church.
- 4.15 The College is in the process of extending its work through the establishment of distance partnerships within the Region. The first of these, with the Benedictine Downside Abbey at Stratton-on-the-Fosse, has already been established and further teaching bases are intended in the North and East of the region.
- 4.16 Alongside these courses stand nationally validated courses such as the Pastoral Carers Course (Wesley College and the Methodist Church) and the Mission Shaped Ministry Course (Wesley College and national Fresh Expressions) as well as a range of day and occasional courses. All courses may be taken in either part-time or full time mode and

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<sup>58</sup> A Memorandum of Agreement between St Mary's University College and Wesley College, Bristol was executed in 2008. This is a legally binding agreement. The Agreement requires that a minimum cohort of 10 students will be provided by the College. The College is required to pay a one-off fee per student together with a validation fee. The agreement is for a period of five years. In the event that either party withdraws from the agreement, one year's notice must be given to allow students to complete their programme.

teaching takes place on both evenings and Saturdays to accommodate students in full-time employment or with other commitments.

- 4.17 In collaboration with the Bristol District and the South & South-West Regional Training Network, the College is developing a broad-based programme with regard to EDEV and CdiM provision, including short courses, and is exploring the provision of further vocational postgraduate awards (M.Div. and D.Min.) to supplement current CdiM and CME provision offered to the Methodist Church and the Church of England.
- 4.18 In 2008-09 the College began to develop the concept of 'Wesley on the Road'. This concept was devised to enable the College to take its short courses out into the community rather than always expecting people to come to them. Its partnership with Downside Abbey is part of this process. It is also seen as a platform on which to deliver on-line courses which, in turn, could lead to 'Wesley on the web'.
- 4.19 The College is committed to the provision of training for the ministry of the whole people of God. In consequence, all of its courses are flexible and open to both lay and ordained.

### **International partnerships**

- 4.20 Over recent years the College has established various types of formal educational partnerships with other theological education providers around the world.<sup>59</sup> The College has developed significant links with the Korean Methodist Church. A Graduate Research Agreement between the College and Hyupsung University, South Korea, was signed in 2008.<sup>60</sup> The Methodist History and Heritage Course, a course offered annually by Wesley College and now sponsored by the Korean Methodist Church, attracts some 20 students per year. The course is a bi-lingual course and leads to a Wesley College Certificate in Methodist Heritage (or Diploma for postgraduate students). The viability of this course depends upon the College's capacity for residential provision for students and also its location within a World Methodist Heritage City.<sup>61</sup>

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<sup>59</sup> Discussions have been taking place between the College and the Perkins School of Theology in the USA (the United Methodist Church seminary which is part of the Southern Methodist University). These discussions are currently suspended because of this review. The College believes that there is a real possibility of obtaining international capital for development. That possibility, too, has presently stalled because of this review. These are illustrations of the blight caused by the review process (see paragraph 3.17 above).

<sup>60</sup> Hyupsung is one of three Methodist Universities in South Korea. The agreement commits both institutions to the sharing of research and good practice at both staff and research student level, to collaborative working (especially in the area of Methodist theology) and to staff and student exchanges.

<sup>61</sup> This year the course had a representative from the South African Methodist Church. There is a possibility of the course being offered more widely to the Methodist Church in Southern Africa and this will be explored in 2009/10.

- 4.21 The College has established exchange programmes with the Tamil Nadu Theological Seminary in South India, the UCZ Theological College in Zambia and the Reutlingen Methodist Seminary in Germany. Exchange programmes include both student and staff exchanges and a number of staff at the College have experience of the World Church.
- 4.22 The College draws widely from the international community. In the academic year 2008 - 09 it has received students from countries both within and beyond the EU, including Germany, India, Zambia, Zimbabwe, the Republic of South Africa, Korea, Pakistan, Jamaica and the USA. The College's extensive theological library and its unique Heritage Collection also attract Methodist scholars from around the world, notably from the USA, Australia and South Korea.
- 4.23 On 23<sup>rd</sup> July 2009 the College was awarded a 'Certificate of Accreditation' by the British Accreditation Council.<sup>62</sup> Accreditation is an essential pre-requisite for any institution wishing to provide higher education to non-EU migrants who want to come to the United Kingdom to study.

#### **Other partnerships**

- 4.24 The College has well-established partnership-working with organisations and agencies within the city of Bristol. These include: SARI (Support against racist incidents); NILAARI (Drug and alcohol support primarily within the Afro-Caribbean community); Bristol Drugs Project; The Methodist Centre (Working with the homeless); Ashfield Young Offenders Institution; the One-2-Five project – support for sex workers (drop in and night bus); work with the elderly (including St Monica's Trust and the Methodist Homes in Bath); schools (including schools for children with special needs); nurseries; Methodist International House;<sup>63</sup> the Salvation Army (St Paul's); and a Roman Catholic Project working with the Indian Community in the South West. These partnerships offer ministerial students a broad range of experience through placements, teaching provision and supervision.

#### **Multicultural and inter-faith engagement**

- 4.25 As a city, Bristol offers a broad multi-faith context. The College is developing both informal and formal relationships with other faith communities, especially the Islamic

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<sup>62</sup> The accreditation lasts for a period of four years and is expected to cost £4,000 for a four-year period together with an annual fee of £1100. Accreditation also entitles the College to include in its publicity material: '*Accredited by the British Accreditation Council for Independent Further and Higher Education as an independent higher education institution*'.

<sup>63</sup> Methodist International House is owned and managed by the Bristol District. The District has decided that MIH should be sold. The Review Group has considered the possibility of the College taking over some of the work presently undertaken by MIH. This is addressed in Section 8.

community. Members of other faith communities teach on some college courses, including the Foundation Degree and the Masters Degree Programme which includes a unit on the History and Culture of Islam. Parkway Methodist Church is situated in the Afro-Caribbean Community, whilst Totterdown Methodist Church is situated within a growing Asian Community and both are used as a placement Churches for students.

### **Academic resources**

- 4.26 The College is regarded by its partners as having exceptional library resources in-house. The library contains over 30,000 volumes and subscribes to nearly 70 academic journals. The College is also home to an extensive Methodist Heritage Collection (see paragraphs 2.18 and 2.19 above), the Methodist Music Society library and the Clifton Diocesan library which was transferred to the College in 2007 - 08. The College is a major provider of library facilities to the University of Bristol and to other partners within the Bristol Federation for Theological Education..
- 4.27 Wesley College students on courses validated by the University of Bristol have full access to and rights in the University of Bristol library as well as departmental and other affiliated libraries (e.g. those at Trinity College and Bristol Baptist College).
- 4.28 In addition to the library and Heritage Collection available on site, and the reciprocal sharing of library resources with other institutions, college students have full internet facilities in-house. ATLA<sup>64</sup> on-line is provided through a joint network project with the Department of Theology and Religious Studies at the University of Bristol. The College is a full participating member of IAMSCU.<sup>65</sup> The College is pursuing membership to THUGCAT<sup>66</sup> and other on-line catalogues.
- 4.29 The College staff at present comprises two core academic tutors, two half-time tutors, fourteen associate tutors, an ecumenical chaplain, a librarian, a resource centre manager, an academic secretary, a college secretary, a bursar and a receptionist. Students may also relate to academic and non-academic staff at the University of Bristol and the Bristol Federation for Theological Education. Both members of the College's core staff are recognised teachers within the University of Bristol and the College.<sup>67</sup>

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<sup>64</sup> American Theological Libraries Association

<sup>65</sup> The International Association of Methodist Schools, Colleges and Universities

<sup>66</sup> Theological Heritage Users Group Catalogue

<sup>67</sup> The College Principal, the Revd Dr Jonathan Pye, is also a recognised doctoral supervisor within the University of Bristol, Honorary Research Fellow in The Centre for Ethics in Medicine and a member of the University Court, all of which promotes wider engagement between the College and the academic community.

## Site resources

- 4.30 The Main Building contains 23 single study bedrooms and a fully furnished two-bedroom family flat. The Main Building also has kitchen and restaurant facilities (the College Dining Room provides breakfasts, lunches and evening meals) and two kitchens for the use of self-catering students. The former chapel (also part of the Main Building) now houses the College library. There is ample on site car parking, a fully equipped play area for children, a football pitch and woodland walks within the College Grounds.<sup>68</sup>
- 4.31 The College has a purpose built, registered<sup>69</sup> Hall of Residence, Frances Greeves House, comprising 23 one and two bedroom flats which are currently let to students of the Bristol Theological Federation and to postgraduate students from the University of Bristol and the University of the West of England.
- 4.32 The Headingley Building provides a tutorial block comprising classrooms, seminar rooms, a vestry and two chapels.
- 4.33 The Heritage Collection is housed in a separate and modified building which is attached to the Main Building. The building is temperature and humidity controlled and has appropriate safeguards to secure the collection against fire, water damage and theft.<sup>70</sup>
- 4.34 The College owns dwellings in the locality, some of which are used as staff dwellings, and others of which are let.<sup>71</sup>

## Entrepreneurial activity

- 4.35 For a number of years the College has endeavoured to make full use of the site in order to maximise its income. The decision of the 2007 Conference not normally to place full-time ministerial students at the College has meant that the commercial exploitation of the site and its facilities has now become an imperative.<sup>72</sup>
- 4.36 In October 1999 the College entered into a lease with O2. The lease relates to a small parcel of land and also gives permission to O2 to install aerials on a number of chimney stacks. O2 obtained planning permission for the installation.

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<sup>68</sup> The Review Group has obtained professional planning advice. This is discussed in Section 7.

<sup>69</sup> Registered with the University of Bristol and Bristol City Council for the purpose of council tax exemption

<sup>70</sup> The building which houses the archives is internally monitored by CCTV. The College has also recently installed state of the art infra-red digital CCTV which monitors the building externally.

<sup>71</sup> These comprise two staff dwellings (8 Ridgeway Court and 70 Northover Road, both of which are houses) and four dwellings which are let (two houses at 17 Northover Road, 19 Northover Road, and two maisonettes at 46a Northover Road and 67 Westover Road). The income received from the dwellings which are let is set out at note 4 to the table at paragraph 6.21 below.

<sup>72</sup> Relevant financial information is given in Section 6.

- 4.37 In February 2003 the College entered into a lease with Network Counselling, an independent Christian counselling and training organisation. Network Counselling has exclusive occupation of a wing of the Main Building.
- 4.38 The leases referred to represent only part of the income-generation activities undertaken by the College. Over the last decade the College has offered conference facilities, accommodation and catering. This has developed into a significant commercial enterprise. Around a third of its clients are purely commercial organisations (e.g. the Freight Transport Association). The remainder of its clients reflect the College's engagement with social provision. Clients include the National Centre for Social Research, the NHS (which runs from the College both the Assist Programmes for Stopping Smoking and Healthy Eating for school children), the local Primary Care Trust, Bristol City Council (which trains for Special Educational Needs, Adult Community Care and other community programmes at Wesley College), the Environment Agency, MIND, Marie Curie Cancer Care, Alcoholics Anonymous and Bristol Bereavement Forum.
- 4.39 In addition to the above, the College is used by schools and church groups of all denominations for quiet days or retreats (many of which are led by members of the College staff). Other clients include the Diocese of Bristol, the Roman Catholic Diocese of Clifton, the Chinese Church, the Korean Church, the Society of Friends and the Sakya Buddhist Institute. Wesley College also hosts a major Language Project each summer and a Finnish Language School throughout the year. All these activities provide not only income for the College but also a wider ecumenical, inter-faith and community engagement. They are an integral part of the College's missiological outlook.

#### **Wesley Conference Centre Ltd**

- 4.40 The combined effect of the activity described above and changes in charity law necessitated the setting up of an independent trading company to deal with the commercial element of the College's activity. The company is a separate legal entity whose sole aim is to generate income for the College. Wesley Conference Centre Ltd (WCC Ltd) was registered as a private limited company in July 2007. The TMCP owns 90% of the share capital. Governance of the company rests with its Board of Directors. Responsibility for the day to day management of the company rests with a full-time General Manager.

## **SECTION 5: RESPONSE TO CONSULTATION**

- 5.1 Our terms of reference state that the Review Group ‘is required to consult widely and especially to include in their consultations the College Principal, the College staff, the Wesley College Council, the S & SW Training Forum, the University of Bristol and other existing ecumenical and educational partners, the Chair of the TSRE and the relevant staff in the Connexional Team’. We list at Appendix 3 the names of those who have responded to the consultation. In addition to those written responses the Review Group has met with three of the consultees. All of the responses received have been taken into consideration in arriving at our final conclusions.
- 5.2 It is, perhaps, unsurprising that the responses from those consulted do not provide a consensus of opinion on what the outcome of our review should be or on the key issues that should inform that outcome. In this section we outline the main themes arising out of this process of consultation, not shrinking from those views which question whether the College has a future as well as making reference to those which support its continued existence as a resource for Bristol, for the South & South-West Region, and for the Connexion. We undertake this exercise by categorising the responses in accordance with the various aspects of the College’s network of relationships.

### **As the core institution in the South & South-West Regional Training Network**

- 5.3 The College’s position as the ‘core institution’ for the South & South-West Regional Training Network is central to this review. It is appropriate, therefore, that we should begin this overview of the results of our consultation by setting out the views of those directly involved with the College through the Regional Training Network.
- 5.4 The 2007 report recommended that there should be five Regional Training Networks in England and that in each there should be a Methodist Training Forum. Until November 2009 Russell Buley was the chair of the Methodist Training Forum<sup>73</sup> in the South & South-West Regional Training Network (‘the Forum’). We have received a written submission from Mr Buley. Mr Buley has also met with the full Review Group.
- 5.5 The Forum took up its full responsibilities in September 2008. The College is represented on the Forum. The College also provides administrative support for the

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<sup>73</sup> Standing Order 340 sets out the role and membership of a Methodist Training Forum. Each Methodist Training Forum is required to produce an annual report containing specified information. That specified information includes a requirement to ‘report on the distribution of funding and training work carried out through the forum’. In his written submission Mr Buley told us that this aspect of their work had consumed a disproportionate amount of time ‘because of a shortage of information and guidance’ from the TSRE.

Forum. Mr Buley told us that the Forum ‘looks to Wesley as the only Methodist training institution in our region’. The College is, in reality, the only serious contender for the role of core institution. Mr Buley told us that ‘Neither SWMTC nor STETS (see paragraph 3.12 above) is able or ambitious to fulfil that key role for our network’. He also went on to tell us that despite the infancy of these new arrangements he ‘can already attest to the appreciation of both STETS and SWMTC for their now being in closer co-operative relationships with Wesley through the work of the Regional Training Network’.

5.6 Mr Buley stressed the importance of the College as a resource for the Regional Training Network. He said that ‘To have a concentration of Conference-appointed ordained theological tutors, a leading theological library and extensive archives at Wesley for us to publicise and to draw upon as a resource in our network is a reason for us to feel encouraged in our new work as a forum’. Mr Buley went on to say that because of what the College has to offer he believes that the Forum will be well-supported in its efforts to fulfil its responsibility to co-ordinate learning and training for the whole people of God across the area served by the Regional Training Network.

5.7 In addition to identifying the positives, Mr Buley did not shy away from a negative. He made the point that from his perspective the location of the College is not ideal. He told us that as someone privileged to live in Cornwall he has had to accept the reality that ‘far’ in Cornwall ‘is a different experiential notion from other regions in England that enjoy a better transport network’. He noted the reluctance of some people to undertake the long journey to Bristol from some parts in the extreme south of the region. He acknowledged that so far as the Cornwall District and the Plymouth & Exeter District are concerned, if one were to take a vote then it was likely that the Methodists and others in those two districts would vote in favour of the College being relocated closer to them. However, he also said that he was ‘presently encouraged by what I believe are Wesley’s intentions to support the work of our Training Officers and EDEV co-ordinators by making its human resources more accessible for the Methodist people throughout the region...’ He went on to say that the College ‘is now more than ever a regional resource for Methodists, even if many of them are yet to realise the significance of that description’.<sup>74</sup>

5.8 The Revd Dr Stephen Dawes is the Methodist Oversight tutor on the South West Ministry Training Course (SWMTC). We noted earlier the lack of clarity concerning the role of a ‘core institution’. Dr Dawes expressed a clear opinion about one particular area

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<sup>74</sup> Since the beginning of September 2009 the College has had a quarter-time appointment of a tutor based in Truro.

for which the core institution for the South & South-West Regional Training Network should accept responsibility. He notes that, as the core institution, the College is to receive funding for the equivalent of two full-time teaching staff and that SWMTC and STETS would between them share the funding for one full-time member of staff. He then goes on to say: ‘This meant, in my understanding, that Wesley would undertake the “regional” work, namely the management of the new Regional Oversight Committee and of all the other “regional” stuff the Regional Training [Network] might envisage for ordination students. This central and resourcing work will need to be done somewhere and somehow by the “core institution”.’

5.9 Like Mr Buley, Dr Dawes highlights the problems that arise as a result of the College’s location in Bristol.<sup>75</sup> He says that ‘The simple fact of geography in this region means that Wesley College Bristol is not well-located for a “core institution” role. Its superb library and reasonable teaching facilities are simply not usable by most SWMTC students or by SWMTC for any teaching purposes because of distance...Without wishing to teach my granny to suck eggs I have found over many years, not least in the nine when I was Chair of the Cornwall District, that the geography of the South West is simply not understood by most of the Connexion...The geographical centre of the South & South-West Regional Training Network is unquestionably Exeter, or to be precise Cullompton, ten miles north of Exeter on the M5.’ However, he very properly balances that point by also noting that the population of Cornwall is less than the population of the city of Bristol. He says that ‘To have the Regional core-institution in Exeter, with minimal buildings (the main one of which would be the library), would be pretty obviously...the best way to resource the whole region, but only if it were decided that this kind of core institution style of things were deemed to be necessary at all’.<sup>76</sup>

5.10 Dr Dawes laments the decision of the Conference to opt ‘for the priority of maintaining three building-based institutions’. He also laments what he regards as the failure to bring to an end ‘an out-dated and college-based system of training for ministerial students’ and replace that system with a ‘universal and accessible context-based part-time system’. However, he balances those statements by making the point that ‘whatever happens,

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<sup>75</sup> The same point has been made by Revd Preb Dr Graham Dodds, Principal of the Bath & Wells School of Formation, who said that ‘perhaps unlike Bristol diocese we do not have too many people wanting to use Wesley College because of the distance and time it takes to travel. Wesley has always remained a college that we promote for its courses, library and environment, but we have found that many parishes tend to want education delivered where they are, not in a central institution’.

<sup>76</sup> Whilst relocation to Exeter would benefit Methodists in Devon and Cornwall, travelling times from other places in the South & South-West Regional Training Network would increase.

Methodism will need some facility to cover students in the Bristol catchment area' which is now covered by the College.

- 5.11 The South & South-West Regional Training Network covers all or part of five Methodist Districts. The Revd Alison Tomlin, now President Designate, was Chair of the Northampton District until the end of the 2008/9 connexional year. Ms Tomlin notes that the South & South-West Regional Training Network is one of three Regional Training Networks to which the Northampton District relates. She says that she believes that the Northampton District 'is a key partner in the work that Wesley College exists to do for Methodism' and says that the District 'would hope to be able to contribute to ideas about future courses and activities'.
- 5.12 The Revd Andrew Wood is Chair of the Southampton District. He notes that the College 'has performed a useful role as enabler for the Forum as the named body for holding and distributing finances and providing administrative resources'. He also acknowledges that the College 'has made itself available both to host and plan training resources for the Forum and as a base for training officers to meet and collaborate.'

#### **As an academic partner**

- 5.13 Professor Gavin D'Costa is Professor of Christian Theology in the Department of Theology and Religious Studies at the University of Bristol. He is also the Programme Director in charge of the Educational Partnership Agreement entered into between the university and the College in 2007 (see paragraph 4.11 above). We received a written submission from Professor D'Costa. Professor D'Costa also met with the full Review Group.
- 5.14 Professor D'Costa spoke very positively not only of the link between the university and the College but also of the quality of the teaching provided by the College. He told us that the College offers 'first rate educational programmes with excellent pastoral support and care'. He said that the learning environment and resources provided by the College 'are entirely up to the task'. He informed us that the university is very pleased with its association with the College.
- 5.15 Professor D'Costa was asked about the possible implications for the relationship between the university and the College if the College were to relocate to a different part of the South & South-West Regional Training Network. On a personal level he told us that in light of the good personal relationships that had been developed there would be both regret and sadness. As for the university's response, he recounted that the university had turned down another institution which had wanted to enter into a similar kind of

relationship because of the location of that institution. He said that the university was not willing to consider validation from a long distance since this would make it difficult for it to undertake adequate quality assurance. If, in the near future, the College were to relocate to a different part of the region then that would not be acceptable to the university.

- 5.16 We also received a response from Professor Esther Reed, Associate Professor of Theological Ethics in the University of Exeter and external examiner for St Mary's University College, Twickenham. Professor Reed has also served as an External Examiner for STETS. In her response, Professor Reed makes the point that she is herself a Methodist who was born and brought up in the South West.<sup>77</sup>
- 5.17 Professor Reed told us that based on a recent visit to the College, discussion with the Principal and, as she puts it, with a 'general "ear to the ground" over recent years', it is her assessment that the College 'seems to have sprung into life. It exudes a certain liveliness and an aura of good management, a sense of "going somewhere" and of being cared for by a team of able personnel'. She says 'It was a matter of considerable joy to me that the building and staff spoke of a strong sense of purpose and of work to be done'.
- 5.18 We referred earlier (see paragraph 4.12 above) to the Foundation Degree course in Mission and Ministry offered by the College and validated by St Mary's University College. Professor Reed told us that 'all the current indications are favourable'. Having met with relevant members of staff from the College, Professor Reed said that she had been 'impressed...with their enthusiasm, commitment to the programme, efficiency, and care for students on the course.'
- 5.19 Professor Jennifer Bone is Pro-Vice Chancellor Emeritus of the University of the West of England and was also a member of the Training Institutions Review Group which reported to the Conference in 2007. Professor Bone has considerable experience of theological education both locally in Bristol and more widely. She makes the point that the link between the College and the University of Bristol 'is of immense value, given the University's international prestige'. This link must not be taken for granted. Were the College to relocate, then that 'would involve substantial revalidation implications, and there would need to be very good reasons for taking the risk that a university might instead choose to end the link'.

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<sup>77</sup> Conscious of the importance of its decision-making being set within an appropriate theological and missiological framework, the Review Group invited Professor Reed to prepare a short paper reflecting on the theological and missiological principles relevant to the task in hand. That paper can be found at Appendix 4.

- 5.20 Professor Bone goes on to speak of the College's strengths as including 'the Methodist inheritance in Bristol together with its strong Methodist archive, and a theological library which I judge is the best in the region, and probably ranks highly nationally'.
- 5.21 As Professor Bone rightly observes, the College's future 'depends upon what the Methodist Church is prepared to permit'. She notes that 'A regional role alone seems unlikely to offer more than a limited future, and there is no shortage of competition for some forms of training, both lay and ministerial'. Professor Bone then goes on to offer the following suggestion. She says that 'What might be timely is to look at Wesley's future from a national perspective, in particular in terms of lay training which takes seriously the intellectual and ethical challenges of contemporary circumstances and engages with them. As a Church, we seem to be in danger of talking only among ourselves or with those whom we think are like-minded'.
- 5.22 Professor Bone ends her response with a word of warning, making the point that 'Wesley is now the only theological college wholly within Methodism's control. The Church can ill afford to lose its strength and potential; but the only way of protecting them for the longer term may be to take a big risk'.
- 5.23 It was clear to the Review Group that Professor Bone had a vision of what the College could become. We invited Professor Bone to develop her thesis and are grateful to her for so readily agreeing to do so. Professor Bone's additional response appears in full as Appendix 5 to our report.

#### **As an ecumenical partner**

- 5.24 We received a written submission from the Rt Revd Declan Lang, Bishop of the Roman Catholic Diocese of Clifton. Bishop Lang told us that there are two areas in which the Diocese values its partnership with the College. Firstly, in recent years the College 'has provided the location and the opportunity to form our students for the Permanent Diaconate. This link has proved very valuable and is something we would wish to continue for the future'. The second area is to do with liturgy and spirituality. Bishop Lang says that one of his priests, Father Michael Fortune, 'is on the staff at Wesley lecturing in liturgy. The College provides the opportunity for Roman Catholics to undertake courses and formation in liturgy matters'. This is something which has been appreciated by those who have participated in these courses.
- 5.25 The Revd Dr Stephen Finamore is the Principal of Bristol Baptist College. In his submission he says that the Wesley College, Bristol, 'is a key partner of the Bristol Baptist College' and that 'Bristol Baptist College greatly values and appreciates its colleagues at

Wesley and Wesley as an institution'. He goes on to make the point that 'A move of Wesley from its existing premises would have a detrimental effect on its partnership with the Federation Colleges<sup>78</sup>' and that a move away from Bristol 'would be an enormous loss to Wesley's partners, to ecumenical cooperation in theological education in the city and to the churches which rely on the expertise within the Federation'.

- 5.26 In terms of the options which this review group should consider as part of its terms of reference, it is appropriate to note that Dr Finamore raises the possibility of closer links, and perhaps a sharing of premises, between the two colleges. He suggested the possibility that 'the two Colleges could share the Baptist building on Clifton Down; the two Colleges could share the present Wesley premises; both institutions could move from their existing sites and move to a new shared site in north west Bristol...The Baptist College would be pleased to talk about its present and projected needs'. These possibilities are discussed in Section 8.
- 5.27 The Revd Canon George Kovoor is the Principal of Trinity College, Bristol. Trinity College is part of the Bristol Federation for Theological Education. According to Canon Kovoor, Trinity College considers itself to be 'open evangelical...a generally hospitable form of the evangelical movement.' The ethos of Trinity College is said to be 'international and gently charismatic'. Canon Kovoor sees these emphases as a reason why 'it has not been possible for us to work with Wesley as closely as we have worked with the Bristol Baptist College'. He says that although Trinity College 'share a few courses with the Methodist College through the Federation', Trinity 'is not able to engage more fully for our theological integrity'. Despite this last point, Canon Kovoor expresses his 'deep appreciation' of the College's Principal, who he acknowledges has 'worked hard to keep the morale high at Wesley' and who 'has developed some very interesting and innovative schemes'. He acknowledges, too, that the College 'has played a very positive part' within the Federation.
- 5.28 Canon Kovoor also acknowledges that Dr Pye 'has been very successful in bringing non-Methodists and international [students] to either use the College as a hall of residence or to study on some of the College programmes'. However, he suggests that 'the question that needs to be addressed is whether this is the purpose for which the Methodist Church established this college'.

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<sup>78</sup> The reference to 'Federation Colleges' is a reference to the Bristol Federation for Theological Education.

- 5.29 The Revd Canon Dr Mike Parsons is the Principal of the West of England Ministerial Training Course (WEMTC). WEMTC was part of the Bristol Theological Centre until it had to close its Bristol centre in 2007 because of lack of Anglican ordinands from the region. Dr Parsons expresses the opinion that ‘The Anglican regional cooperation in the Bristol area has been dogged with lack of enthusiasm, special agendas and personality clashes’.
- 5.30 Dr Parsons makes the point that ‘The Wesley library is excellent in general theological terms and unique in its Methodist material’. He expresses the view that ‘It is both a strength and a weakness that Bristol has a Methodist, an Anglican and a Baptist college’. In his opinion, ‘Wesley has the better plant and facilities’. He also expresses the opinion that ‘Wesley models a broader and more inclusive ecclesiology and approach to mission than either of the other colleges. To lose it would make some from non-evangelical backgrounds feel they have nowhere to go’.
- 5.31 The Review Group has received a very detailed submission from the Revd Canon Dr Peter Sedgwick, Principal of St Michael’s College, Llandaff. At the time when Dr Sedgwick was appointed as Principal, St Michael’s faced similar problems to those faced today by Wesley College, Bristol, in terms of securing its future. Dr Sedgwick outlines the steps taken as an illustration of what can be achieved with appropriate support from the sponsoring body – in the case of St Michael’s, the Anglican Church in Wales. He says that ‘The position of St Michael’s is slightly different from Wesley. We managed in the summer of 2004, when I arrived as the new Principal, to obtain from the bishops of the Church in Wales a guarantee that all students training residentially for ordained ministry would come to the College. There has also been a block grant over the last few years, and a commitment to refurbish the College, which we are beginning to do this summer.’
- 5.32 It is clear that under Dr Sedgwick’s stewardship the fortunes of St Michael’s have been turned around. He says, for example, that St Michael’s ‘now have a capital grant of £650,000 from the Church in Wales to refurbish the building, and make it a church conference centre. We also have a subvention of £150,000 per annum for three years to allow us to break even, while we attract new business. We have appointed a business manager of great commercial experience, *and are following the lead of Wesley College [emphasis supplied]*...in providing good catering and conference facilities’. He goes on to say that ‘The support of the Church in Wales has given us a lifeline. The Methodist Church in Wales has also been supportive’.

### **As a training institution under the governance of the Methodist Council**

- 5.33 We noted earlier the requirement in our terms of reference that we should consult with the Chair of the TSRE and the relevant staff in the Connexional Team. With respect to the latter, we invited Mr Doug Swanney, as Head of Discipleship and Ministries, to consult with relevant members of staff in the Connexional Team and put in a single response. This he has done.
- 5.34 Mr Swanney has made it clear that the Connexional Team does not consider it appropriate to indicate any particular view on the issues that are central to this review. He says that ‘As employees of the Council and servants of the Conference it will be our role to support whatever decision is made about the College...The [Connexional] Team will be able to advise SRC when the review is complete and will then do whatever SRC and the Methodist Council decides. Once a decision has been made about the future of Wesley College Bristol we will of course play a significant role in how this is best able to be delivered...’ He also assured us that ‘no *a priori* judgment about the future of Wesley College has been made by any member of the Connexional Team’.
- 5.35 We have also received a response from Revd James Booth, Chair of the TSRE.<sup>79</sup> Mr Booth highlights a concern referred to earlier in our report with respect to the meaning of ‘core institution’. He says, ‘My problem is that I am unaware of any definition of what the Methodist Church understands by the term “core institution”. In consequence, it is difficult to speak other than in general terms about what it might mean in any particular regional context to function as the “core institution”.’
- 5.36 Against the background of that uncertainty, Mr Booth goes on to say that ‘Each core institution is challenged to be and become a kind of hub holding together a network within a particular geographic region. Thus the key to its functioning effectively is not the more obviously institutional elements (plant, building, place to gather) but the relationships and partnerships that are established and which will feed and nurture the Network’
- 5.37 As stated earlier, other respondents to the consultation have noted the quality and importance of the Wesley College library. Mr Booth says that he believes ‘that access to library provision has to be a vital component of any effective learning provision’.

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<sup>79</sup> Mr Booth was Chair of the TSRE at the time when it produced the *Future Use and Configuration of Training Institutions* report in 2006.

### **As a college community**

- 5.38 Our terms of reference required us to consult with the College Principal, the College staff and the Wesley College Council. We also considered it appropriate to consult with the present student body.
- 5.39 The College Principal, the Revd Dr Jonathan Pye, has made a written submission. Dr Pye has also met with the full Review Group. The Review Group is grateful to Dr Pye for providing a great deal of information about the present shape and work of the College. Much of that information has informed the writing of Section 4 of our report.
- 5.40 Not surprisingly, Dr Pye was concerned about the loss of income resulting from the decision of the 2007 Conference not normally to send full-time ministerial students to the College. The College has had to try to find ways to replace that money. Dr Pye said ‘What we’ve been able to do is to meet the money that’s fallen off the cliff by raising local money to maintain the College. I would love to say that we’d met in the middle. We haven’t. But we’re working towards it. And I still believe that this can be a self-sustaining entity.’
- 5.41 Dr Pye talked about development that has taken place at the College, in terms of new partnerships and new courses. He told us that ‘The opportunities are limitless. If we have more students, we can afford more staff; if we have more staff, we can have more courses. And almost month by month we are setting off on new partnerships’.
- 5.42 We asked Dr Pye about the impact of relocating the College to a different part of the region. He made the point that ‘The nearer you move to one place, the further you move from somewhere else. So we could move to be much more accessible to our colleagues in the Cornwall District, and they would love that, because for them Bristol is a suburb of Birmingham. And if you live the other side of the Tamar, it does feel like that...But if you push us further into the peninsula, you move us away from the east/west axis. The Bristol District goes to places like Chippenham and Swindon. We could be pushed further towards Devon and Cornwall, but the danger if you do that is that you’re pushing us towards smaller and smaller population groupings.’
- 5.43 Although Dr Pye accepted the need for a review of the College, the point was also made very forcibly that the timing of this present review has been debilitating. He noted that ‘The 2007 report said: “Part-time training; look at the way in which you train, look at the constituency you train.” We do that, we set up a foundation degree, but less than three months into that degree we’re told there’s to be another review. We’re not being given enough time to respond to one review than we’re being pushed into another review.’ It

was his understanding that this is not what the 2007 Conference had intended. He said ‘The sense of Conference was that we were going to be given a period of calm water in which to make transition, to reconfigure, to set up new ways of working, which we’ve done. But we’re the one institution that’s been catapulted into [a further review]. And that feels unfair on the staff...It’s like being caught on a beach, and being knocked over by a wave, and the next wave comes before you’re able to stand up again, and it’s that constant sense of being knocked down every time, and we haven’t even had time to evaluate and assess.’

- 5.44 During the course of this review Dr Pye has been on sabbatical. In his absence the Revd Dr John Emmett was Acting Principal. Dr Emmett is also the Director of Programmes and Research at the College. Dr Emmett’s response to this review echoed that of Dr Pye. He, too, is convinced that the College needs to remain on its present site. He is also concerned that the College is ‘given time...to be allowed to develop our strategies and our buildings and to get our new staff in place’. He, too, considers that ‘this review is untimely and inconsistent with another connexional policy that gave us funding for a transitional phase. Given that we are being reviewed, I would urge that we are allowed to develop our strategies and relationships without the threat of major upheavals that will damage [the College] as well as affect the morale of existing and soon-to-join staff.’
- 5.45 Dr Mervyn Davies, formerly a full-time member of the College staff and now an associate tutor with the College, also lamented the problems for the College that have been created by what he describes as the ‘doubt...as to whether the Methodist Church was committed to the College’s continuance at all’. He spoke of the ‘planning blight and loss of credibility for the College that has severely affected its ability to market itself as a theological resource.’ Dr Davies went on to express the opinion that if the College were to close or relocate ‘Its loss to Bristol would be a catastrophe’.
- 5.46 In his very thoughtful and detailed response, Dr Davies set out a range of models of how the College might be developed and also made some very specific proposals. Whilst we do not consider it necessary to set out those very detailed proposals in our report, we do wish to make it clear that in arriving at our decision we have given those proposals very careful consideration.
- 5.47 We have also received submissions from the College’s 2008/9 cohort of ministerial students. The work of collecting and collating the response of the students has been undertaken by Charity Hamilton. The Review Group wishes to express its thanks to her for undertaking that piece of work. Ms Hamilton says that the views of the students were

obtained by questionnaire. There had been a 100% response to the questionnaire. That, in itself, is impressive.

- 5.48 In their response, the students highlight what they consider to be the ‘spacious and suitable’ accommodation provided at Frances Greeves House. They make the point that this building ‘is spacious, quiet, safe, in close proximity to the College, with communal areas and is good value for money’. They also make the point that these flats are in a peaceful area ideal for studying. They consider the accommodation to be ‘of good standard although some of the things in the flats could do with being updated’.<sup>80</sup> As with other respondents to this consultation, the students speak very positively about the quality of the College library which they consider to be superior to the other library resources available to them in Bristol (e.g. at the University). The catering and dining facilities were also the subject of praise. As with other consultees, the students described the Headingley Building as ‘tired’.
- 5.49 The analysis of the responses to the questionnaire ends by stating that ‘Students felt that their experience on this site had been incredibly positive. Students felt that the nature of the site and the resources within the physical environment had greatly enhanced their training...Students felt that the relationship between student body and conference centre was important and that “sharing” the site enhanced the student experience as it meant interacting with a wider variety of people. Students felt that the site had a great deal of potential’

#### **As a partner with Wesley Conference Centre Ltd**

- 5.50 At paragraph 4.40 above we explained the role of Wesley Conference Centre Ltd. Mr Peter White is the Chair of Wesley Conference Centre Ltd. We considered it appropriate to invite Mr White to respond to the consultation process.
- 5.51 Mr White notes that Wesley Conference Centre Ltd was set up in order to comply with Charity Commission regulations in order ‘to manage its non-core income as this has grown so large in relation to the income earned through theological training’. He makes the point that the only way that the College can survive ‘is to find outside business, either theological/other training courses, or through alternative uses of the building’.
- 5.52 In the light of the breadth of the services now provided by the College, Mr White’s assessment of the premises is rather different from that of some of the current users of the building (including the students). He expresses the opinion that in the context of the modern environment the College buildings, whilst being in a reasonable state of

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<sup>80</sup> The College has a programme to upgrade the flats as funds permit.

repair...do not satisfy the needs of most external users. The acoustics are poor in most meeting rooms. The dining room is noisy. The Headingley Building is dark and dingy, and the layout inappropriate for multiple lettings...The bedrooms do not have en-suite facilities, which everybody now expects. The customers providing the largest income are the language schools which come because we can turn single bedrooms into multiple dormitories...' He goes on to make the point that 'we [Wesley Conference Centre Ltd]<sup>81</sup> have no money to invest in transforming the premises into a more acceptable offering...'

5.53 Having brought the negatives sharply into focus, Mr White also makes a positive suggestion for future development. He says that 'the development of a Methodist Conference Centre on the Wesley College site with an emphasis on offering Methodist heritage, Methodist ethics, Methodism in the modern world, might provide a viable exciting business opportunity. This could then satisfy the theological training requirements too...'

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<sup>81</sup> Wesley Conference Centre Ltd was established with a share capital of £100 and no working capital.

## **SECTION 6: THE FINANCIAL POSITION OF THE COLLEGE**<sup>82</sup>

- 6.1 The Review Group's terms of reference require it 'To bring to the Methodist Council...a proposal for the future of Wesley College which...enables it to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network, *in an affordable and sustainable form*' [emphasis supplied]. To be able to comply with that requirement it is necessary to understand the present financial position of the College.
- 6.2 This section will address the current finances of the College in the context of (i) the College's historic funding and (ii) the impact on the College's viability of the recent Conference decisions referred to earlier in this report. It will also seek to assess the financial potential of the College as it is currently funded. It will amplify one aspect of the financial history of the acquisition of the site and buildings referred to in Section 2 of our report.

### **Sources and methodology**

- 6.3 In addition to the sources of information already referred to in the previous sections of our report, other sources of information relied upon in the preparation of this section of our report are:
- (i). the disclosed accounts of the College and of WCC Ltd;
  - (ii). supplementary financial information provided by the College Bursar, the College Librarian, and the General Manager of WCC Ltd; and
  - (iii). an informal professional valuation of the complex by Lambert Smith Hampton.<sup>83</sup>
- 6.4 Two methodologies have been adopted for this analysis: firstly, a financial equivalent of a standard academic contextual analysis; and, secondly, the application of standard financial analytical techniques and modelling tools. The analyses will consider income, capital and revenue expenditure; and current and potential commercial operations.

### **Financial status of Wesley College**

- 6.5 Since 1946, the College complex has been held on trust by the TMCP as Custodian Trustees with the Methodist Council acting as Managing Trustees.<sup>84</sup> The day to day discharge of the latter responsibility has been delegated to the College Council. In recent years the process of gaining authorization for *ad hoc* disposals of parts of the site in order to fund essential capital expenditure may have caused the underlying financial situation

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<sup>82</sup> Thanks are due to the College Bursar, Mr David Tucker, for his assistance in the preparation of this section of the report.

<sup>83</sup> Issues relating to the valuation of the site are discussed in Section 7.

<sup>84</sup> The historic cost of Wesley College is included in The Methodist Council Consolidated Financial Statements within the Restricted Fund for Training.

of the College to have escaped conscious scrutiny by the Managing Trustees. The process has served to obscure the fact that essential facilities for the College were funded not from connexional budgets, but from the sale of parcels of the College estate.

- 6.6 Changes to the connexional ministerial training policy and to the funding of training institutions have had an adverse impact on the College. These changes have resulted in Frances Greeves House (built expressly for occupation by ministers-in-training) and study bedrooms in the Main Building becoming surplus to requirements and to other facilities at the College being under-used. The consequential shortfall in income has required the College to cover a proportion of current account expenditure by commercial activities. It has been possible to assure a steady stream of income by letting the Frances Greeves House accommodation to students of the colleges of the Bristol Federation for Theological Education and the University of Bristol. However, exploitation of the other not fully utilized resources necessitated, under charity law, the establishment of an independent company, WCC Ltd.<sup>85</sup> As a subsidiary company set up by a charity, WCC Ltd has entered into a Gift Aid arrangement with the College.<sup>86</sup>

### **Historic capital expenditure**

- 6.7 As recorded at paragraph 2.4 above, a decision was taken not to re-open Didsbury College after the war, but to transfer it 'with its name, endowments<sup>87</sup> and traditions' to Bristol. Consequently the 'New Didsbury Fund' was established as a sub-set of the Ministerial Training Fund to record the proceeds of sale of Didsbury College, donations, interest earned on balances, and a transfer from the 'General Reserve of the Ministerial Training Fund' towards the venture, together with expenditure on the new College buildings etc at Bristol. The following analysis has been constructed from the archive records of the Ministerial Training Committee:

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<sup>85</sup> It is believed that WCC Ltd is ineligible to claim relief from business rates.

<sup>86</sup> This is scheme whereby a subsidiary company agrees or contracts to pay to the charity a sum of money equivalent to some or all of their taxable profits (sometimes referred to as 'profit shedding') which is not treated as a distribution of profit, but as a qualifying donation under the company Gift Aid rules relievable as a charge on income.

<sup>87</sup> TMCP has confirmed that there are currently no such endowments.

NEW DIDSBURY FUND	
<i>Income</i>	£
Sale of Didsbury College	86692
Sale of furniture	2295
Donations	338
Donations: local appeal	4881
Head Office Appeal	11746
Interest	8021
	<u>113973</u>
Transfer from General Reserve	40000
	<u>153973</u>
<i>Expenditure</i>	
Purchase of Henbury Hill House	15000
Contract Price of Wesley College	117500
Other Expenditure	17674
	<u>150174</u>
Balance (application not known)	<u>3799</u>

6.8 One way of viewing this summary is that the proceeds of the disposal of the College building and accoutrements of Didsbury College funded the purchase of the Henbury Hill house and grounds and, with interest and gifts, the greater part (86%) of the cost of the new college built in 1953. Indeed by use of (i) the ‘endowments’ from founding colleges and (ii) the sale of over half of the original estate<sup>88</sup> the College has largely met capital expenditure without call on Connexional finances, as shown in the following table of the costs and sources of funding of the current complex.<sup>89</sup>

<sup>88</sup> Supplementary financial information supplied by the Bursar.

<sup>89</sup> Sales to fund Frances Greeves House:

		£
1982	80 Henbury Road	22000
1982	College Park Drive	212000
1983	82 Henbury Road	30000
1983	Ridgeway	120000
1984	Didsbury House	224000
	Total	608000

		£	
Purchase of Site and 'Didsbury House'	1944	15000	Proceeds of sale of Didsbury College, Manchester
Construction of Wesley College	1953	117500	Mostly from the proceeds of sale of Didsbury College, see above table.
Tutorial block and new chapel	1968	42700	MTF's College and Building Extensions Fund*
Conversion of old chapel to library	1968	14500	MTF's College and Building Extensions Fund*
Construction of Frances Greeves House (self-contained flats for married students)	1985	600000	Sale of 5 parcels of the Henbury Hill site, 'Didsbury House', and one dwelling house.
Historic cost of complex		789700	

*\* This Fund was set up using the proceeds of sale of Wesley College, Headingley (see paragraphs 2.9 & 6.9 above). In effect, therefore, this item of capital expenditure was funded from those proceeds of sale.*

6.9 In addition, since 1999 the College has invested over £0.5m in a substantial programme of work recorded in detail in Appendix 6. The schemes include the installation of a lift and ramp access to the Main Building in order to comply with the Disability Discrimination Act 1995. The costs of the schemes may be classified thus:

	£
Capital schemes	132,000
Major programmes of a capital nature	213,600
Refurbishment	68,900
Repairs and renewals	97,000
	<u>511,500</u>

On this basis, the historic capital cost of the College complex is a little over £1.1m.:

	£
College complex as at 1985	789,700
Capital schemes	132,000
Major programmes	213,600
	<u>1,135,300</u>

6.10 Those items of expenditure shown in italics in Appendix 6, together with (i) the creation of an Estate Property Reserve<sup>90</sup> and (ii) making good deficiencies on current account expenditure for the years 1998-99 & 1999-2000, were met from the sale of four properties<sup>91</sup>:

		£
1999	15 Northover Road	142,445
2000	12 Westover Rise	62,650
2000	69 Westover Rise	62,990
2001	69A Westover Rise	70,913
	Total net proceeds	<u>338,998</u>

The remaining costs were funded by careful husbanding and budgeting.

<sup>90</sup> Subsequently and successively re-designated as the 'New Property Fund' and the 'Improvement and Maintenance Fund' but intended to be spent on something substantial, an improvement or addition.

<sup>91</sup> Supplementary financial information supplied by the Bursar.

- 6.11 The policy of ‘living off capital’ is at best a short-term practice which obscures the underlying financial position. It can lead to the sale in a depressed market of an asset with inherent scope for substantial appreciation in value. In the case of Wesley College, it has meant that wholly necessary upgrading of the College facilities, including substantial amounts to meet new legislative standards, were met without the cost appearing explicitly as such in the Church’s financial statements. It has also meant that because there was no call on connexional funds, the Managing Trustees were not necessarily made aware of the financial needs of the College for which they were responsible. To all intents and purposes Wesley College, Bristol, was seemingly costing the Connexion nothing and this may well have led to it being undervalued by the Methodist Council. Had the Council been required to ensure that provision was made in the connexional budget for capital expenditure at the College, or had the Conference been required to authorize the sale of parts of the College estate to fund such expenditure, the Council might have had a fuller understanding of the value of its one remaining theological college. Indeed, that knowledge might have informed other decisions which have impacted upon the College.
- 6.12 The practice of selling parcels of the estate to fund essential capital expenditure has had another impact which can be said to be both beneficial and dis-beneficial: it made it possible for essential capital building work to proceed without impact upon the connexional budget and thus made possible connexional expenditure in other areas. However, it did so without proper prioritization between expenditure on the College and the alternative uses of capital. This is not good practice, especially when resources are scarce.

### **Current Account (Revenue) Expenditure**

- 6.13 The College Bursar maintains the accounts for the College and also those for WCC Ltd. The following financial documents for the College were available for scrutiny:

Management Accounts	Financial Accounts	Budget
2005 - 06 2006 - 07 2007 - 08 2008 - 09	2006 - 07 2007 - 08	2007 - 08 2008 - 09 2009 - 10

- 6.14 This period is notable in that it covers the transition precipitated by the implementation of the new training policy and changes to the funding of training institutions agreed by the 2007 Conference and the consequential ‘hiving-off’ to WCC Ltd of the College’s non-core, non-charitable activities required to generate income to subsidize core activities.

- 6.15 The management and financial accounts differ only in degree of detail: the management accounts are the more detailed and include allocations of income and costs to cost centres. Those were:
- (i) Tuition (*including the costs of the Director of Studies' manse*)
  - (ii) Library and Heritage Collection
  - (iii) Resource Centre
  - (iv) Lettings
  - (v) Central Services (*i.e., Administration, costs of the Principal's manse, and unallocable costs*)
  - (vi) Conference & Catering (WCC Ltd)
- 6.16 The year 2005-06 was the first in which cost centre accounting was adopted and it is still in its infancy, with only direct cost allocations. Costs that cannot with certainty be allocated to other cost centres were posted to Central Services. Ideally, all costs which could not be so allocated should be apportioned on reasonable and specific bases. Similarly, the total of residual central services costs are best apportioned to the other costs centres so as to give a clearer idea of the overall costs of each activity.<sup>92</sup> Apportionment and re-apportionment of costs introduces imprecision into cost centre results, but these are preferable to *circa* 40% of the combined costs of the College and WCC Ltd, or 60% of the College costs, being attributed to Central Services.
- 6.17 Since the beginning of the Connexional year 2008-09 *SAGE* accounting software has been used, and additional 'departments' have been set up for each manse and for Frances Greeves House, but not WCC Ltd nor Network Counselling which are part of the 'Lettings Dept.' to which 30% of gas and electricity, 20% of water, and 10% of ground maintenance and insurance costs are apportioned. Since the O<sub>2</sub> installation has an independent mains electricity supply, and Network Counselling pays variable service charges proportionate to the area occupied, the case for extending the range of cost centres is not overwhelming and is not pressed.
- 6.18 The service charge for Network Counselling<sup>93</sup> was £8,905 in 2007-08 and £9,000 in 2008-09 and will remain so for 2009-10. It was intended that WCC Ltd should pay rent and service charge under a formal lease, but has in its first two years of trading instead paid £25,000pa under what is intended now to be a licence. This is addressed further at paragraph 6.28.
- 6.19 The *unaudited* accounts of the College are submitted annually to the Connexional Team for consolidation into the Church's accounts prior to them being audited. Its accounts

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<sup>92</sup> SORP 2005, note 169 (b).

<sup>93</sup> Assessed as 15% of the cost of gas and electricity, 10% of water and grounds maintenance, and 5% of insurance

are not otherwise audited. In 1975 the College Council resolved<sup>94</sup> to establish a New Property Fund (now known as the ‘Estates Property Reserve’) with a ‘Reserves Policy Limit’ of £100,000. The balance in this fund was never large. It amounted to £20,545 as at 31 August 2008, of which £14,925 was accrued interest since 1998. However, since the college accounts are consolidated into those of the Church, and there appears to be no requirement for the College to adopt any college-specific accounting policies, those of the Church also apply to the College and the College has, for some time, not sought to establish resilience<sup>95</sup> (including reserves) within its balances.

6.20 The College complement is eight full-time equivalent posts and WCC Ltd employs 19 people, one of whom is unpaid but has the use of a flat free of charge.

### Income

6.21 These are the summarized results for the College for the years 2005-06 to 2008-09, together with the budget for the year 2009-10:

		2005-06	2006-07	2007-08	2008-09	2009-10
		£	£	£	£	£
Income:						
Fees	MCF	74048	87273	65431	47623	13446
	Other	34892	59495	40686	45082	39600
Grants		173519	173753	185356	260405	137000
Rents	Students	35433	33617	38416	26614	15600
	WCC Ltd	0	0	25000	25000	25000
	O2	6958	6958	6958	7800	7870
	Other	138442	146897	144167	140493	169478
Service Charge	NC	4620	4620	4620	9000	9000
Sales		5549	3051	3342	3461	3000
Donations		751	4990	4403	924	1000
Interest		2479	3271	2590	2723	1500
Total Income		476692	523926	520970	569124	422494
College Expenditure		503537	555359	505760	500607	486233
Surplus/Deficit (-)		-26846	-31433	15210	68517	-63739

### Notes:

1. The years 2008-09 & 2009-10 reflect current connexional advice to licence the use of part of the College to WCC Ltd at a cost of £25,000 pa, rather than lease it at c£30,000 pa and to levy a service forgone of £10,000 pa as originally intended.
2. The connexional grant for 2008-09 includes a **one-off** amount of £100,000 without which the deficit for the year would have been £31,500.
3. The results would be less favourable if the College Council were to comply with the Managing Trustees’ advice to Treasurers about employees’ remuneration: College staff are paid rather lower college-specific rates.
4. Other Rents include income from Frances Greaves House, Leases, and from four dwellings which are let. The budget for 2008-09 was:

	£
FGH: Federation Students	78960
17 Northover Road	14400
19 Northover Road	14400
46a Northover Road	7200
67 Westover Road	6900

<sup>94</sup> See the 1975 College Council minutes, minute 7(b)(ii).

<sup>95</sup> In this context ‘resilience’ means the availability of reserves sufficient to cover unexpected costs, and periodically recurring costs.

<i>Network</i>	28400
<i>Bristol Methodist District</i>	<u>1500</u>
<i>Total</i>	<u>151760</u>

6.22 The weakness in this analysis is that of attribution of costs to ‘Central Services’ which are a rather large proportion of the total college costs. If the net costs after the offset of service charges were to be apportioned to other costs centres and these ‘overheads’ were chargeable to WCC Ltd and Network Counselling, the financial outturn of *the College* would have been somewhat healthier. However, since the profits of WCC Ltd are gifted to the College, even if a proportion of the ‘overheads’ had been charged to WCC Ltd, the *combined result* would have been different only to the extent that they were chargeable to Network Counselling. Indeed, had WCC Ltd been required to bear a proportion of the ‘overheads’, WCC Ltd would have either:

- (i) traded even more unprofitably or,
- (ii) been forced into a downward price/profit spiral (where an increase in prices to cover additional costs would have resulted in a reduction in the number of customers and thus lower income).<sup>96</sup>

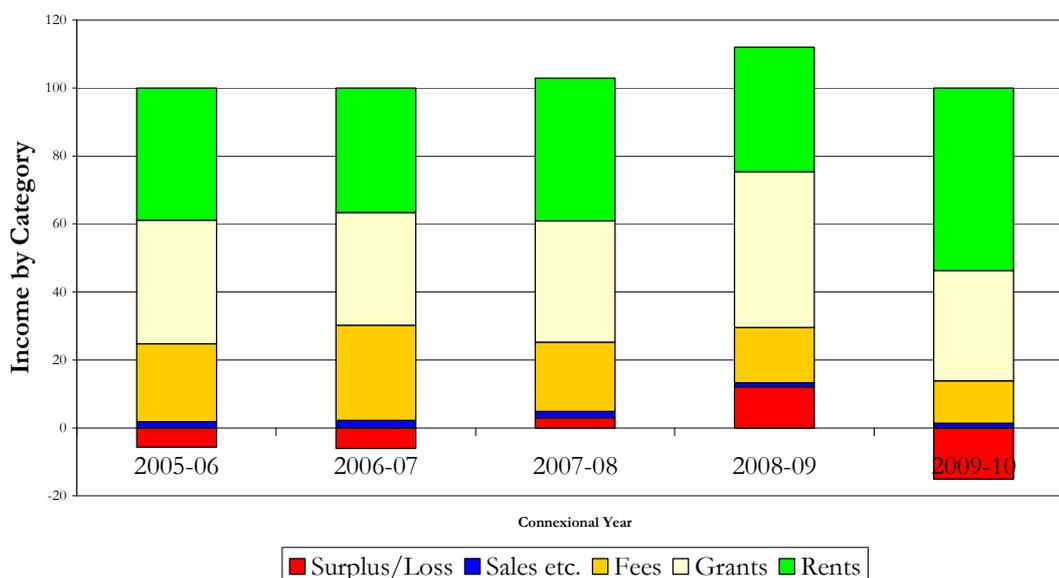
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<sup>96</sup> In 2007-08, on a turnover of £294,518 (including rent of £25,000), WCC Ltd reported a loss of £9,783. A similar result is expected in 2008-09.

6.23 Analysed as a percentage of total income, sources of income are shown in the following table and chart:

		2005-06	2006-07	2007-08	2008-09	2009-10
Income:		%	%	%	%	%
Fees	MCF	15.5	16.7	12.6	8.4	3.2
	Other	7.3	11.4	7.8	7.9	9.4
Grants		36.4	33.2	35.6	45.8	32.4
Rents	Students	7.4	6.4	7.4	4.7	3.7
	WCC Ltd	0.0	0.0	4.8	4.4	5.9
	O <sub>2</sub>	1.5	1.3	1.3	1.4	1.9
	Other	29.0	28.0	27.7	24.7	40.1
	NC	1.0	0.9	0.9	1.6	2.1
Sales		1.2	0.6	0.6	0.6	0.7
Donations		0.2	1.0	0.8	0.2	0.2
Interest		0.5	0.6	0.5	0.5	0.4
Total Income		100.0	100.0	100.0	100.0	100.0
Income as %age of Expenditure		94.7	94.3	103.0	113.7	86.9
Surplus/Deficit (-) as %age of Expenditure		-5.3	-5.7	3.0	13.7	-13.1

**Financial Results as Percentage of Income**

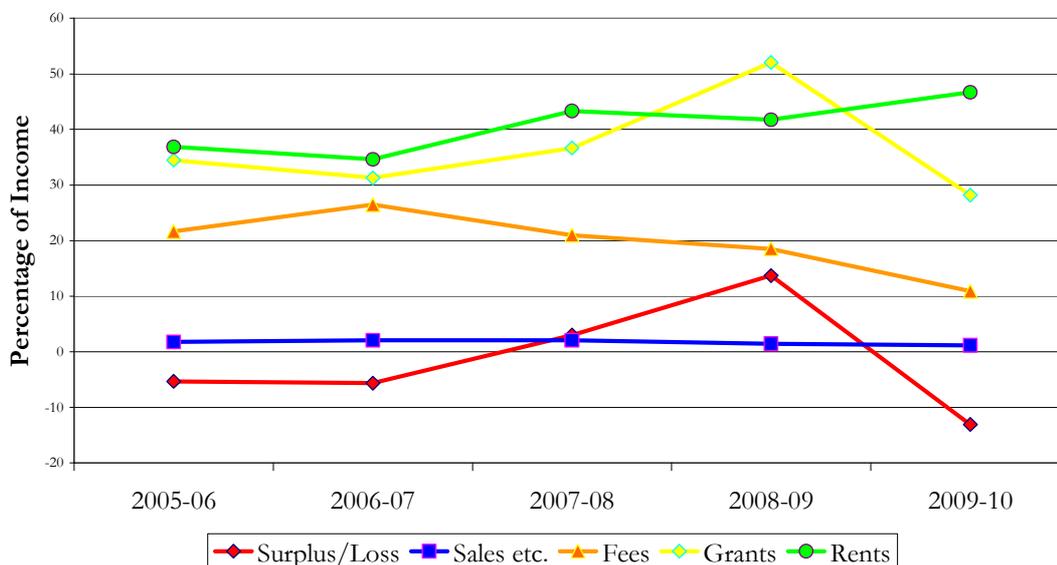


6.24 In these analyses, income from ‘Grants’ is principally connexional funding in the form of block grants in the years up to the end of the year 2007-08 and thereafter ‘core funding’ as proposed in the report of the Training Institutions Review Group. For the years reviewed, the connexional grant was respectively £167,240, £170,585, £176,566, and for 2008-09, £256,000 which includes a one-off amount of £100,000. The connexional budget proposes a grant of £137,000 for 2009-10. The reduction in student fees and

students rents is in large part<sup>97</sup> attributable to the cessation of full-time initial ministerial learning at the College. The following table demonstrates the effect of the loss of fee and grant income in the years 2005 - 06 (the year before the changes in the policies for initial ministerial learning and grant-funding of theological colleges) and the year 2008 – 09;<sup>98</sup> and the graph and chart reveal (i) how the reduction in grant income is mirrored by an increase in the operating loss, and (ii) the extent to which rents are assuming an even greater importance in bridging the gap between income and expenditure.

	2005-06		2008-09		Reduction	
	No	£	No	£	No	£
Pre-ordination students, full-time	10	44830	0	0	-10	-44830
Pre-ordination students, part-time	3	8175	<3	5000	0	-3175
Foundation student, full-time	4	12240	0	4600	-4	-7640
Foundation student, part- time	2	3633	0	0	-2	-3633
Probationers	5	4600	0	0	0	-4600
		73478		9600		-63878
Core Funding		0		74000		74000
Fixed Cost Support		0		20000		20000
Block Grant	0	167240		0		-167240
<b>TOTAL</b>	<b>24</b>	<b>240718</b>	<b>8</b>	<b>103600</b>	<b>-16</b>	<b>-137118</b>

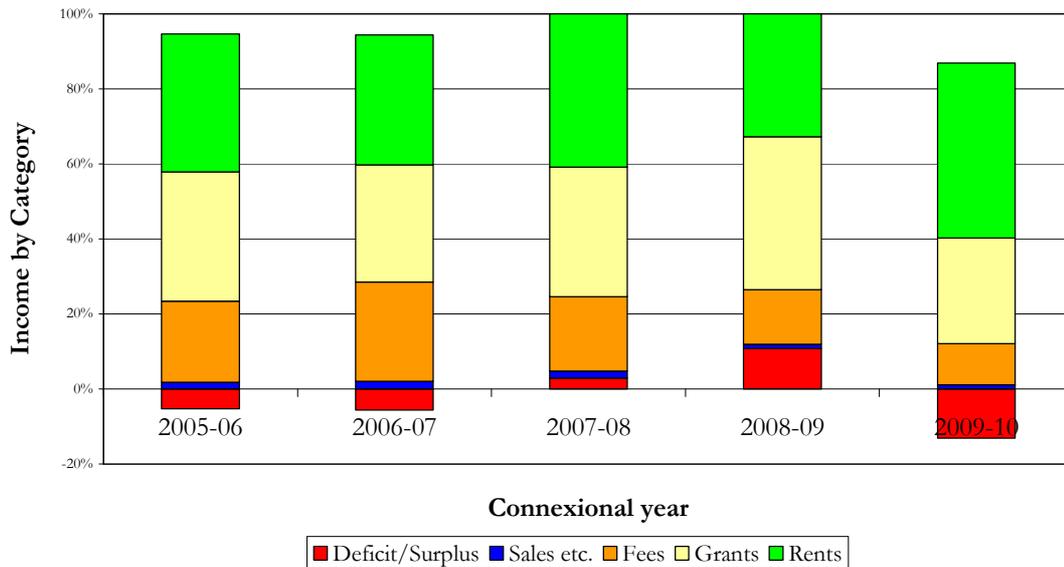
**Income as a Percentage of Expenditure**



<sup>97</sup> The cessation of Foundation Training is also a factor.

<sup>98</sup> Additional financial analyses provided by the Bursar.

### Financial Results as Percentage of Expenditure



6.25 In summary, a reading of the accounts reveals the finances of the College to have been finely balanced until changes in training policy resulted in reduced income from the Connexion. Even though transitional financial provision was made, and the college has actively and successfully marketed itself, these policy changes have resulted in the College having an uncertain financial future with scant reserves to cope with variations in income. In order to make good the shortfall, the College Council has sought to develop a broader commercial outlook so as to maximize the use of the College by undertaking non-core activities in addition to the provision of training for the whole people of God.

#### Wesley Conference Centre Ltd ('WCC Ltd')

6.26 As a result of the changed connexional training policy the budgeted Connexional grant for the College is to be £134,000<sup>99</sup> for 2010-11 and £112,000 for 2011-12<sup>100</sup>. The new policy has also meant that Frances Greeves House is no longer required for occupation by full-time ministerial students and so, to maximize occupancy and income whilst retaining its 'Hall of Residence' status,<sup>101</sup> flats are rented to students of the other Bristol Colleges with which the College is federated and to students of the University of Bristol, thus preserving eligibility as a charity for rate relief. However, the costs of operation of

<sup>99</sup> There is a £3,000 difference between the connexional and college budgets which is attributable to the dates on which the budgets were fixed. The difference does not invalidate the conclusion to be drawn from the progressive reduction in the level of support.

<sup>100</sup> Figures extracted from information supplied by the Connexional Team in a statement entitled *Connexional Level Funding for Wesley College Bristol excluding fees*.

<sup>101</sup> A charitable status that is accorded both the 80% mandatory and the 20% discretionary relief from council tax.

the College are largely fixed in nature so there remains a need to maximise income from those facilities no longer required for core purposes. Since the budgeted connexional grant is to be reduced by £20,000 pa in each of the next two years, in order to balance the books commercial activities must generate a similar cumulative amount. This is in addition to existing income from Network Counselling<sup>102</sup> which occupies one wing of the Main Building, and O<sub>2</sub> which has a microwave mast on the roof.<sup>103</sup> Network Counselling pay rent of £26,600 pa and a service charge of c£9,000, and O<sub>2</sub> rent of £7,800 pa. Masts like O<sub>2</sub>'s are understood to be susceptible to business rating (c£1,000 pa).

- 6.27 The imperative<sup>104</sup> to maximize income from the use of the College complex<sup>105</sup> and changes to charity law have prompted the incorporation of WCC Ltd, and has exposed that company to business rates and corporation tax, the latter avoided by a Gift Aid arrangement with the College. In its budget for 2008-09 WCC Ltd projected a profit of £16,458 on a turnover of £349,000 after paying a service charge of £10,000 and rent of £40,000 (which last sum was on professional advice reduced in agreement with the College to £30,000). However, in its first year of operation, WCC Ltd declared a loss of £9783,<sup>106</sup> 3.3% of turnover, after paying the lease<sup>107</sup> fee of £25,000.
- 6.28 As its name suggests, WCC Ltd promotes the College facilities for residential and day conferences; the catering facilities for delegates, residents, and to the public; and short-term letting of spare accommodation. WCC Ltd occupies a substantial part of the Main Building and has use of the Headingley Building when it is not being used for tuition.

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<sup>102</sup> The lease was for a period of six years with a rent review after three years. The lease contained a break clause, at the option of the tenant, after three years. The initial rent was £22,600 pa. The original lease has now expired and the tenant is holding over under the terms of that lease. Negotiations for a new lease are ongoing.

<sup>103</sup> The lease is for a period of twelve years with a rent review every three years. There was a mutual break option in the sixth year. The initial rent was £6,000pa.

<sup>104</sup> We use the word 'imperative' advisedly. Minutes of a visit to the College by a sub-group of the Training Institutions Review Group on 11<sup>th</sup> January 2007 records that 'The Connexion encouraged the College to diversify to make itself into a thoroughly viable operation; this has been carried out with considerable success. Over half the College's income comes from outside Methodism, and over a third is from non-educational activities (e.g. conferences). Wesley College is now in the process of establishing a trading company to ensure that its business ventures do not compromise its charitable status as an educational institution.' The TMCP owns 90% of the share capital of WCC Ltd (see paragraph 4.40 above). It is clear to the Review Group that the College's entrepreneurial activity has been encouraged and approved by the Connexion.

<sup>105</sup> This is no marginal venture, but is over 35% of the combined turnover of the College and WCC Ltd and yielded c£15k in 2007-08.

<sup>106</sup> Wesley Conference Centre Ltd Report & Accounts for the year ended 31<sup>st</sup> August 2008.

<sup>107</sup> A formal basis for WCC Ltd's occupancy has yet to be negotiated. A payment of £25,000 was made in 2007-08 and described as a lease fee. The College budget for 2008-09 initially included a lease fee of £40,000 which was subsequently reduced to £30,000 on receipt of professional advice. Ultimately WCC Ltd paid £25,000 by way of a licence fee.

During the course of this review, the nature of the financial arrangements between WCC Ltd and the College was under review. When WCC Ltd was established it was envisaged that the arrangement would reflect the practice at Methodist Central Hall, Westminster. However, WCC Ltd does not enjoy exclusive use of a defined part of the College but uses and lets rooms temporarily unused by the College, which means that a licence arrangement is more appropriate than a lease. Initially it was intended that WCC Ltd would pay both a lease fee and a service charge amounting together to £40,000 pa. Current plans (which have yet to be approved by the SRC) are to allow WCC Ltd free use of spare accommodation and utilities, and for WCC Ltd to pay only a licence fee of £25,000 per annum, or 10% of the turnover of the business of WCC Ltd, whichever was the greater. The trading results of WCC Ltd for the year 2008-09 were not available at the conclusion of the Review, but were expected to be comparable with the previous year, a loss of *circa* £10,000.

- 6.29 The Review Group notes that although the College stands to benefit from the profits of WCC Ltd via Gift-Aided donations, WCC Ltd has no working capital and thus its losses during the first two years of operation are eating into the Colleges' cash balances. Indeed, if WCC Ltd were to be wound up now, the College (or more precisely, the Methodist Council) would bear a loss of c£20,000.
- 6.30 The occupants of most rooms share bathroom facilities but two single rooms are en-suite. Occupancy is about 40%<sup>108</sup> and could be increased to 70% without impact upon staffing levels. If this could be achieved at present tariffs, the marginal income would be *circa* £38,000 pa.<sup>109</sup> Accommodation tariffs seem very reasonable and are considered to be competitive for the area and type of accommodation. The General Manager does not think there is scope to increase them. The cost of weekend lunches seems to be very reasonable, and probably reflects a marginal cost approach to pricing.<sup>110</sup> The Review Group's view of WCC Ltd's trading position is that although its target profit on turnover is not quite 5%, there is only marginal scope for increasing income from commercial activities. For example, upgrading a number of single rooms to two-thirds that number

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<sup>108</sup> 43% in the last twelve months

<sup>109</sup> This is the assessment of the General Manager of WCC Ltd.

<sup>110</sup> A marginal cost approach is usually adopted when direct costs and overheads have been covered by core business, but the recurring question in this analysis is whether WCC Ltd is being relieved of a proportion of the fixed costs of the College allocated to Central Services. If Central Service costs were apportioned in part to WCC Ltd, the resulting fully-allocated costs would drive a different pricing policy resulting in fewer customers for both meals and accommodation. On the other hand, it is the case that WCC Ltd subsidises the College by maintaining in existence the catering and accommodation facilities which would otherwise be much more difficult to sustain.

of en-suite bedrooms solely for WCC Ltd use is superficially attractive, but recovery of the capital cost of conversion through increased tariffs would probably take a number of years. Indeed, against the backdrop of WCC Ltd's first two years trading results, attainment of additional surpluses of £20,000 in each successive year is doubtful for it implies substantially increasing utilisation and/or prices during an economic downturn.

### **Summary**

6.31 The finances of the College were finely controlled throughout the period reviewed but the policy changes regarding initial ministerial learning and the funding of theological colleges fundamentally altered the viability of the College. Moreover, the implicit challenge, recognised initially by the College and endorsed by the Governance Scrutiny Review team on 14<sup>th</sup> March 2005<sup>111</sup>, to make good the resultant deficit by undertaking non-academic commercial activities, reveals at best a misapprehension as to the extent of necessary income generation, especially as the connexional grant is progressively reduced. Realistically there is little scope for increasing marginal income from current commercial activities in the short-term.

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<sup>111</sup> The minutes of that meeting indicate that the College was encouraged to be '*entrepreneurial*'.

## SECTION 7: LAND AND BUILDINGS

7.1 The Review Group's terms of reference require that we should identify 'in general or specific terms the geographical location and context of the College and its institutional form [e.g. buildings, assets, staffing, resource-facilities] – having thoroughly reviewed and costed a range of reasonable options'. Fulfilling this part of our terms of reference requires us to consider the value and marketability of the land and buildings. That, in turn, required us to investigate relevant planning issues and to undertake an appraisal of the state of the buildings.

### **Ownership of the land and buildings**

7.2 The land and buildings occupied by the College are owned by the Methodist Church. The purchase of the present site was completed in 1945. Under the terms of a Trust Deed executed on 8<sup>th</sup> January 1946, the land and buildings are held on trust by the TMCP as Custodian Trustees with the Methodist Council acting as Managing Trustees. The Trust Deed makes it clear that in the event of a sale of the site and building the Methodist Council would hold the proceeds upon trust 'to apply the same as income for the general purposes of the Ministerial Training Fund<sup>112</sup> in such manner as the committee<sup>113</sup> shall from time to time direct'.

7.3 Our enquiries<sup>114</sup> lead us to believe that in the event that the College were now to be sold the proceeds of sale would *not* be available for unrestricted Methodist Church purposes. Upon sale the proceeds of sale may only be applied by the Methodist Council for the general purposes of the Methodist Fund for Training.<sup>115</sup>

### **Planning Appraisal**

7.4 The Review Group has commissioned a Planning Appraisal from Lambert Smith Hampton ('LSH').<sup>116</sup> In the course of preparing their advice LSH have consulted with the relevant Area Planning Coordinator for Bristol City Council ('the Planning Authority').

7.5 The site occupied by the College is in a Conservation Area. In consequence, all new development and additions/alterations to existing buildings must both protect and

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<sup>112</sup> The Ministerial Training Fund is still in existence and is known as the 'Fund for Training'. The Methodist Council Consolidated Accounts for the year ended 31<sup>st</sup> August 2007 show a balance of £2.149m. A note to the accounts says that 'Since training costs have been paid centrally since September 2000, this fund now represents mainly the fixed assets belonging to the restricted Fund for Training.'

<sup>113</sup> The relevant committee today is the Methodist Council which acts as Managing Trustees.

<sup>114</sup> The Review Group is grateful to Miss Elizabeth Ovey, Chancery barrister, for providing an informal opinion on the interpretation of the Trust Deed.

<sup>115</sup> The purposes of the Methodist Fund for Training are set out in Standing Order 362(4).

<sup>116</sup> The Planning Appraisal is reproduced in full at Appendix 7.

enhance the character or appearance of the Conservation Area. The site includes a woodland area and this is protected not only by virtue of it being within a Conservation Area but also as a result of Tree Preservation Orders. The site is also the subject of a number of policies of a landscape protection nature. As a result of those policies the woodland, the recreation ground<sup>117</sup> and all other green spaces on the site are protected open spaces.

7.6 The built up area of the site (i.e. the Main Building, the Headingley Building and Frances Greeves House) is excluded from the ‘open space’ policy. As a result, the Planning Officer has confirmed that the extension of these buildings (by filling in the gaps in and around the existing buildings) or new build within the existing footprint of these buildings is, in principle, acceptable.

7.7 The Conservation Area designation does not prohibit demolition, though Conservation Area consent would be required in order to demolish any of the existing buildings. So far as the Main Building is concerned, LSH has sounded a note of caution about the prospects of obtaining consent to demolish. In a supplemental e-mail LSH state that in appraising any application to demolish, the Planning Authority would look at

- The contribution the existing building makes to the character of the Conservation Area and the impact of its loss on the Conservation Area;
- If the existing building is deemed to contribute strongly to the character of the Conservation Area, its potential for other beneficial use and potential for retention/repair/conversion will be assessed; and
- Whether there is a replacement proposal and the suitability and quality of the replacement.

7.8 LSH also discussed with the Planning Officer the possibility of change of use of the site. The Planning Officer was of the opinion that a proposal for change of use to a residential/care home or a retirement village or perhaps a medical facility were likely to be the most favoured re-use options given the site’s location and the nature of the surrounding land uses. LSH go on to say that

‘It was acknowledged that the College currently had an ancillary office function and that would not rule out the acceptability of a scheme that had an office element to it, but a primarily office/business use was unlikely to be favourably viewed. Retail and hotel use were likely to be ruled out on the basis that the site is sequentially out of

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<sup>117</sup> i.e. the football pitch referred to at 4.30 above.

town and would fail policy tests such as distance from city centre services when judged against other central sites.’

- 7.9 It is clear from LSH’s advice that if the site is to be developed even within the limitations set out above, then a range of professional expertise will be required in preparing a design concept and seeking the necessary planning consents. This is likely to include the need for a Character Appraisal by a conservation architect with input from a landscape architect. Planning, Building Surveying, Mechanical and Electrical engineering and Architectural design input will also be required in order to prepare a concept design. All of this would be an essential preliminary to the eventual submission of a full planning application. The Review Group has not obtained estimates of the likely cost of such work.

### **Property Appraisal**

- 7.10 The Review Group has also obtained an informal Property Appraisal from Mr John Lee, a Chartered Architect.<sup>118</sup>
- 7.11 The Main Building was built in 1953. Mr Lee advises that the fabric and structure of this building appear sound. He notes that the most recent Quinquennial Report lists a number of essential minor repairs and maintenance requirements over the next five years with a total estimated cost of less than £20,000. However, he goes on to identify a number of significant issues which need to be addressed. He notes, for example, that the building is poorly insulated and that none of the windows are double glazed; that the heating boilers are in urgent need of replacement and that the heating system is likely to have come to the end of its life; that the lighting throughout the building is in need of replacement; that the fire alarm system is in need of upgrading; that the main rooms are dated and utilitarian; and that the library (housed in the original chapel, converted for this purpose<sup>119</sup>) is totally inappropriate for its use<sup>120</sup> and in very poor decorative order. Mr Lee also makes the point that the expected life of a tiled roof is normally 60 years. The Main Building is now approaching 60 years of age and re-roofing is likely to be required within the next 5 to 10 years.

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<sup>118</sup> Mr Lee is the Estates Manager for Methodist Homes. The Review Group expresses its appreciation to Mr Lee for the work he has undertaken. His report appears as Appendix 8.

<sup>119</sup> See paragraph 2.9 above.

<sup>120</sup> Mr Lee says that ‘The large uninsulated windows give rise to unacceptable solar gain in summer and heat loss in winter’ and goes on to express the opinion that ‘Given the historic significance of some of the books and documents stored in the library this is a matter of considerable concern’. It is important to be clear that Mr Lee’s concern relates to the library and *not* to the Heritage Collection which is stored separately and in appropriate climatic conditions.

- 7.12 The floor area of the Main Building is approximately 2,600 square metres. The cost of full refurbishment is likely to be in the range of £800 - £1,000 per square metre. Together with fees and VAT this puts the total estimated costs for full refurbishment at between £2.679m and £3.483m.
- 7.13 With respect to the Headingley Building, built in 1968, Mr Lee advises that it ‘exhibits many of the disadvantages of institutional buildings constructed in the late 60s’. He goes on to say that it is difficult to see how this building has a sustainable future. He advises that it has an economic and operational life of no more than five years. If demolished and replaced Mr Lee advises that the cost of replacing it with a two storey building within a similar footprint would be around £2.329m. The alternative would be for the building to be demolished and landscaped.<sup>121</sup>
- 7.14 The third building on the site is Frances Greeves House. This was built in 1985. Mr Lee advises that this is a relatively modern building in good condition. He says that with careful planned maintenance Frances Greeves House should continue to provide an acceptable standard of accommodation for the next 20 years. However, the building is in need of some significant expenditure over the next five years. Some of the kitchens need to be replaced. None of the windows is double-glazed. Mr Lee advises that towards the end of the next five years consideration should be given to upgrading the bathrooms.
- 7.15 In his capacity as Estates Manager for Methodist Homes, Mr Lee has significant experience of dealing with planning applications. He agrees with the advice received from LSH that it is likely that the Main Building will have to be retained. He says that
- ‘It should be recognised that the approval of a planning application in a Conservation Area such as this is especially difficult, expensive and time consuming. In my experience a planning application of any substance would take a minimum period of 18 months to prepare and obtain and a more realistic expectation is that it will take between 24 and 36 months.’

### **Current market value of the estate**

- 7.16 In addition to undertaking a full Planning Appraisal, LSH has also provided an informal valuation of the land and buildings. In the light of that advise the Review Group proceeds on the basis that the open market valuation (for existing use) of the College estate with vacant possession is in the region of £8.64m<sup>122</sup>:

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<sup>121</sup> If the Main Building were fully refurbished it is doubtful that the Headingley Building would need to be replaced.

<sup>122</sup> The informal valuation is reproduced in full as Appendix 9. In the process of agreeing the final version of our report it was noticed that, in error, LSH had been asked to give an approximate current market

	£
Main Building	3,360,000
Headingley Building	600,000
Frances Greeves House	2,280,000
Staff dwellings (houses) (2)	1,000,000
Dwellings which are let (houses) (2)	1,000,000
Dwellings which are let (maisonettes) (2)	400,000
	<u>8,640,000</u>

7.17 The informal valuation is heavily qualified. LSH highlight in particular:

- its informality;
- its lack of consideration of planning issues;
- the lack of research into potential demand;
- the scarcity of property finance;
- the fact that potential buyers with the wherewithal to purchase are driving hard bargains;
- that values have been 20-30% higher; and
- that ‘the rate of decline in market values has certainly slowed down, albeit [LSH] have yet to see any rise’.

7.18 In addition to advising on open market value, LSH was also invited to advise on the possibility of a sale and leaseback arrangement. LSH advise that a sale and leaseback arrangement, for a lease period of between ten and twenty years, would attract a rent of between £520,000 and £620,000 pa.<sup>123</sup>

7.19 It should be noted that sale and leaseback agreements are designed essentially to permit entities which are short of working capital and cannot otherwise raise it, to realise the capital appreciation of an asset so as to maintain a current level of activity. Unlike a bank loan attracting onerous conditions (and which can be repaid early, perhaps at a discount), a sale and leaseback arrangement ties the vendor into a lease agreement for a specific term (say, 20 years), and with specific conditions. Conditions can be varied, but always at additional cost. Sale and leaseback can restrict future use, since the owner’s permission has to be gained for anything that changes the nature of the property. However, the key point to note is that sale and leaseback increases the cost of occupation overall, since the

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valuation of only three of the four houses owned by the College (see Appendix 9, page 123 below). The Review Group has calculated the valuation of the fourth manse on a pro-rata basis.

<sup>123</sup> LSH considers a rental value of between £10 and £20 per square foot to be appropriate for this period. By way of comparison, the lease payment charged to Network Counselling for exclusive occupation of one wing of the Main Building is £26,000 pa, which sum is based upon a formal professional valuation by Chartered Surveyors, Easton Bevens. On a similar basis, the O2 rental from 2008-09 was fixed at £7,800 pa. Easton Bevens has also advised that an appropriate rent for WCC Ltd to pay to the College would be £30,000pa from 2008-09.

purchaser extracts a profit and recovers from the transaction what the capital might otherwise have earned.<sup>124</sup>

### **Selling the land and buildings**

7.20 The informal valuation suggests that the sale of the site and buildings (the Main Building, the Headingley Building and Frances Greeves House) could possibly achieve a price of £6.24m. There are a number of points which must be borne in mind when considering the possibility of selling the site.

7.21 Firstly, it is important not to be seduced by a professional valuation. The land and buildings are worth not what a professional valuer says they are worth but what a ready and willing purchaser is prepared to pay.

7.22 Secondly, both LSH and Mr Lee advise that if the decision be made to dispose of the site, current market conditions are such that now is not the time to sell.

7.23 Thirdly, as is plain from the Planning Appraisal and the property Appraisal, any purchaser wishing to develop the site and/or change the use of the site will be faced with a potentially lengthy, difficult and expensive planning application. Mr Lee makes the point that

‘There are essentially two routes which can be followed should the decision be made to dispose of the site. The first would be for planning permission for a change of use to be obtained by the Church/college prior to marketing. This would provide prospective purchasers with some assurance at the time they make their offer and is therefore likely to enhance the value. Alternatively, if no permission is in place, prospective officers are likely to be on a “subject to planning” basis such that completion of the sale could not take place until a satisfactory permission was in place. Clearly in the first case the Church puts resources at risk in the expectation of receiving a higher value and in the second the developer places resources at risk.’

7.24 Fourthly, whether a sale of the site were to occur as a result of a decision to relocate the College to a new site or as a result of a decision to close the College, it is probable that there would be a gap in time between the College vacating the site and the site being sold. During that period of time the Methodist Council (as Managing Trustees) would be responsible for preserving, maintaining and securing the site and buildings. Mr Lee has

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<sup>124</sup> The possibility of imputing the rental commanded by a sale and leaseback agreement as a notional cost of operating the College was considered and discounted as inappropriate. The use of a ‘Test Discount Rate’ or measuring the ‘Internal Rate of Return’ of schemes is a recognised methodology for evaluating and comparing *new* projects competing for scarce resources but neither of those approaches is of relevance to the situation which the review addresses, that is, discerning a way to make the College viable.

advised that this would be likely to cost in the region of £180,000 in the first year. He goes on to say that

‘It is reasonable to assume that these costs will be sustained or exceeded in subsequent years until the sale was completed. These do not take account of anything other than building-related costs and other costs will depend upon operational decision eg the storage or transfer of the library and archives elsewhere, the disposal of furniture and other loose assets.’

7.25 Having explored in detail the backdrop to this review, we are now in a position to consider what options there may be for the future of the College.

## **SECTION 8: OPTIONS**

- 8.1 Our terms of reference require us to bring a proposal for the future of the College which enables the College ‘to fulfil its Conference-agreed vocation as the core institution in the S & S W Regional Training Network, in an affordable and sustainable form’ and which ‘identifies in general or specific terms the geographical location and context of the college and its institutional form [e.g. buildings, assets, staffing, resource-facilities] – having thoroughly reviewed and costed a range of reasonable options. The terms of reference also require us to recommend ‘the key partnerships which are to be sustained, developed or initiated for the College to fulfil its mission’.
- 8.2 As we noted earlier (see paragraph 2.11 above) the Commission on the Future of Wesley College, Bristol, which reported in 1971, considered four possible schemes for the future of the College but came to the conclusion that none of those schemes would be effective and viable. It concluded, with evident regret, that the College should be closed and sold. We also noted earlier (see paragraph 2.14 above) that in 1998 the college itself undertook a review of its future. It considered eight options. Closure and sale was one of the options considered.
- 8.3 Our terms of reference appear to be premised upon an acceptance that the college should continue to exist and that it should continue to be the core institution for the South & South-West Regional Training Network.<sup>125</sup> It therefore seemed to us that consideration of the possibility of closing the college could not be amongst the ‘range of reasonable options’ we were entitled to consider. We have no doubt that there are those who believe that the College should be closed. We are equally in no doubt that if we do not consider that option then some will argue that our report is incomplete and therefore flawed. With that in mind, we have sought and obtained the agreement of the SRC to our terms of reference being widened to enable us to consider the option of closure.
- 8.4 The review group has revisited the schemes considered in 1971 and 1998. It has also considered a range of alternative options. In total, the review group looked at twenty-five

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<sup>125</sup> It is important to make the point that our terms of reference do not suggest that the purpose of the review is to consider whether closure of the College may be appropriate. Indeed, notes of a meeting held on April 9<sup>th</sup> 2008 between the then General Secretary of the Methodist Church, the Principal of the College and the Secretary of the Wesley College Council expressly confirm that ‘The sole objective of the Review is to ensure that the College can fulfil its core purpose as the lead institution in the South West Regional Training Network...as established by the Methodist Conference, in an affordable and sustainable form in the future’.

options. This was reduced to eight. These eight options are considered in the remainder of this section.

### **Option 1: relocation of the College to an alternative site in Bristol**

8.5 We noted earlier the difficulty we faced in understanding what is expected of the College as the ‘core institution’<sup>126</sup> for the South & South-West Regional Training Network. It is clear from the 2007 report of the Training Institutions Review Group that the core institution is to have a teaching responsibility. The report said that ‘Core funding will be allocated to each network with the aim of supporting two teaching staff members (full-time equivalent) at the core institution to resource a Methodist community of scholarship’.<sup>127</sup> It is clear that that teaching responsibility is not confined to initial ministerial learning but is much wider than that and is intended to include teaching for the whole people of God.<sup>128</sup> It is equally clear that a ‘core institution’ has administrative responsibilities towards both the Regional Training Network and the Methodist Training Forum.<sup>129</sup>

8.6 We noted earlier (see paragraph 3.25 above) that the Chair of the Training Institutions Review Group has indicated to us that the role of a core institution includes responsibility for

‘administering the finance for the Region and allocating it as agreed by the Training Forum and the Connexion; allocation of staff including any Training Officers who would be deployed around the Region as agreed by the Forum.’

The intention of this was to ensure that resources, human and financial

‘would be made available to the various centres for training for programmes such as EDEV; Local Preacher Training and Development; Worship Leaders; Lay Ministry; Pre Ordination...and such other areas as the Forum had agreed upon.’

8.7 The College’s fulfilment of those responsibilities is not the Review Group’s only concern. We must also consider the College’s relationships with the South & South-West Regional Training Network, the South & South-West Methodist Training Forum and the five Methodist Districts served by those bodies, all of which is part of its remit as the core institution for this Region.

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<sup>126</sup> See paragraphs 3.22 to 3.26 above.

<sup>127</sup> 2007 Conference Agenda p. 162 para. 3.1.9

<sup>128</sup> See, e.g., p. 162 para. 3.1.6, p. 163 para 3.1.14 and p.166 para. 4.2

<sup>129</sup> See, e.g., p.163 para. 3.1.12

- 8.8 The question of which ‘key partnerships’ are to be maintained is a more difficult issue. We have no doubt that the college regards all of the partnerships described in Section 4 of our report to be ‘key partnerships’. We bear in mind the very positive comments made by those with whom we have consulted (see Section 5) and the significant contribution which those partnerships make to theological education in the South & South-West Region. However, we consider that the practical reality is that any claim for a partnership to be a ‘key partnership’ must be based in no small part upon the extent of the financial contribution which that partnership can make to the College and (the opposite side of the same coin) which the College can afford to maintain.
- 8.9 Notwithstanding the work that might be expected of the College as described in the preceding paragraphs, the Review Group accepts that as a result of the decision of the 2007 Conference not normally to send full-time ministerial students to the College, the accommodation available on the Henbury Hill site now exceeds the College’s present requirements. Removal to an alternative location within Bristol requires a determination to be made of the accommodation required to enable the College to fulfil its present core activities while also allowing scope for expansion of that work.
- 8.10 On its present ten-acre site the College has available to it 28,000 square feet of accommodation in the Main Building, 5,000 square feet of accommodation in the Headingley Building, together with the residential accommodation available in Frances Greeves House. For the purpose of investigating the feasibility of relocating to a new site, the Review Group makes the assumption that in any new premises the College would not require
- (a) residential accommodation<sup>130</sup>; or
  - (b) full kitchen and catering facilities.
- 8.11 For the purposes of this exercise, the College has indicated to the Review Group that it considers that it would require alternative premises with a minimum of 11,500 square feet of accommodation available. This includes 6,600 square feet for teaching and for tutors’ offices, 500 square feet for central services offices and reception and 4,400 square feet to accommodate the present library and Heritage Collection.<sup>131</sup>
- 8.12 In Section 7 of our report we set out the advice we have received concerning the land and buildings presently occupied by the College. In the event that the decision were

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<sup>130</sup> That assumption is not accepted by the College. The College points out, for example, that residential accommodation is necessary for students undertaking the Foundation Degree in Mission and Ministry.

<sup>131</sup> The Review Group accepts that a case needs to be made out for retention by the College of the library and Heritage Collection. This issue is considered in Section 9.

taken that the College should relocate to another site, a number of issues would arise concerning the logistics of such a move:

- (a) The purchase of new premises would involve capital expenditure. Given the uncertainties relating to the sale of the existing land and buildings<sup>132</sup> the Review Group foresees difficulties in arranging for the synchronisation of the sale and purchase. That may mean that the Connexion would have to provide bridging finance to enable the purchase of the new premises to be completed in advance of the sale of the existing premises.
- (b) Even if new premises were leased rather than purchased, the Review Group considers it likely that there would be some capital expenditure involved in acquiring, converting and equipping those new premises. It is likely that that expense would have to be funded prior to completion of the sale of the existing site.
- (c) We have noted that the impact of the decisions of the Conference to move from block grant to core funding and not normally to send full-time ministerial students to the College has adversely impacted upon the financial viability of the College in its present form on the present site. If the College were to relocate to a new site it would be essential that sufficient revenue funding were made available to sustain the College on the present site until such time as the move to new premises could take place.<sup>133</sup>
- (d) If the College moved to new premises in advance of the sale of the existing site, the Methodist Council (as Managing Trustees) would have to accept full responsibility for managing the existing site until such time as it could be sold. This would involve the run-down, 'moth-balling' and security costs referred to at paragraph 7.24 above.

8.13 Appendix 10 of our report contains a financial impact assessment of the proposals considered in this section. It can be seen from the first table in that Appendix that whereas the budgeted income and expenditure account for 2009/10 shows a shortfall of

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<sup>132</sup> See Section 7.

<sup>133</sup> This is a crucially important point. The SRC approved an additional £100,000 of funding for the College for the Connexional year 2008-09 in addition to the transitional tapering relief made available to those colleges adversely affected by the decisions of the 2007 Conference. The Review Group has invited the SRC to consider further additional funding for the College until decisions about its future are finalised. That request was refused by the SRC at its meeting on 25<sup>th</sup> August 2009. The Minutes of that meeting (Minute SRC/09/37) record that 'There was also a more general question about whether there should be further transitional funding for the College agreed at this point in time. The SRC declined this request, on the basis that the Methodist Council had been clear about the terms of the current funding'.

around £64,000 if the College remains on its present site, that shortfall would be likely to rise to in excess of £334,000 if the College were to relocate to an alternative site<sup>134</sup> in Bristol. In other words, the figures currently available to the Review Group indicate clearly that the relocation of the College in a reconfigured form at an alternative site in Bristol could not be achieved ‘in an affordable and sustainable form’.<sup>135</sup>

8.14 Having concluded that Option 1 is not a viable option, the Review Group decided that it would be inappropriate to invest either time or money in a search for a suitable alternative site.

### **Option 2: relocation of the College to an alternative location within the South & South-West Region**

8.15 It is clear that our terms of reference intended us to consider the possibility of relocation of the College to an alternative location outside Bristol. In Section 5 of our report we have noted the views of some of those with whom we consulted that, from their perspective, the College is not ideally situated in the South & South-West Regional Training Network. For example, the Revd Dr Stephen Dawes expressed the opinion that ‘The simple fact of geography in this region means that Wesley College Bristol is not well-located for a “core institution” role’. He went on to make the point that ‘The geographical centre of the South & South-West Regional Training Network is unquestionably Exeter, or to be precise Cullompton, ten miles north of Exeter on the M5’. However, he also acknowledged that the population of the whole of Cornwall is less than the population of Bristol.

8.16 It is also clear from the results of our consultation that in terms of the College’s existing partnerships, some of the most significant of them would not survive relocation to a different part of the region. That would not only be the case with the College’s relationship with the University of Bristol but also with its membership of the Bristol Federation for Theological Education and its pioneering relationship with the Roman Catholic Diocese of Clifton.

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<sup>134</sup> i.e. an alternative site providing a minimum of 11,500 square feet of accommodation. The Appendix shows that even if there were an exceedingly minimalist approach to the configuration of a re-located college limiting it to accommodation (6,600 square feet) simply for two tutors, an administrator and some teaching space, there would still be a shortfall of in excess of £62,000.

<sup>135</sup> The Review Group discussed the possibility of seeking a radically reduced cost base for the College by entering into a partnership with another education provider resulting, for example, in shared reception and teaching space. This is considered at paragraphs 8.18 and 8.19 below.

8.17 The Review Group is satisfied that even if relocation to a different part of the South & South-West Regional were a viable option financially, the negative consequences of such a move far outweigh the positive consequences. However, for the reasons set out in paragraph 8.13 above, the Review Group is satisfied that relocation to a different part of the South & South-West Region is not financially viable.

**Option 3: that the College should be incorporated within an already existing university or centre of theological education**

8.18 The Review Group does not consider this option to be feasible.<sup>136</sup> The only serious possibility for such an outcome would be with the University of Bristol. Though such a merger would preserve the wholly academic aspects of the College's present work, it would also have the effect of leaving the Region without a 'core institution' able and willing to undertake the requirements of a core institution as described earlier in this section of our report.

8.19 Notwithstanding this last point, an informal approach has been made to the University of Bristol. The Principal of the College, the Revd Dr Jonathan Pye, has consulted with Professor Gavin D'Costa<sup>137</sup>. Professor D'Costa has indicated that the University 'would not be inclined to have Wesley as a Centre within the Department in physical and intellectual terms for all sorts of reasons, not per se, because of Wesley but to do with internal issues'. The Review Group considers it unlikely that any other educational institution would take a different view. In any event, as we have already indicated, such a solution would not enable the College 'to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network' but would simply be a means of preserving the College's academic business as a provider of university-validated theological education.

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<sup>136</sup> That is the view of six of the seven members of the Review Group including all of those with local knowledge.

<sup>137</sup> Professor D'Costa is one of those with whom the Review Group has consulted – see paragraphs 5.13 to 5.15 above.

**Option 4: that the work of Methodist International House, Bristol, should be merged with the work of the College**

- 8.20 Methodist International House, Bristol is a hall of residence situated in the Clifton area of the city. It accommodates mainly international postgraduate students and attracts students from over 25 countries each year. The building is owned by the Bristol District of the Methodist Church.
- 8.21 The Bristol District Trustees have already taken the decision to close Methodist International House as it currently operates from its present site, to sell the property and to invest the proceeds of sale in future support of students within the area served by the District. Current estimates suggest that the proceeds of sale are likely to be in the region of £1m. The District Trustees have been charged by the District Synod to bring forward recommendations about the future use of the proceeds of sale.
- 8.22 The Revd Ward Jones, Chair of the Bristol District and Chair of the Bristol District Trustees, has informed us that the District Trustees are willing to explore the possibility of a formal arrangement which would link the work currently being undertaken at Methodist International House with that currently undertaken by the College. The College would be willing to consider making Frances Greeves House available for students who would otherwise have stayed at Methodist International House.<sup>138</sup> As part of any such arrangement the District Trustees would be able to make the proceeds of sale of Methodist International House available to the College.
- 8.23 In Section 7 of our report we outlined the advice contained in a Property Appraisal. It is clear from that advice that £1m would be insufficient to meet the cost of undertaking necessary refurbishment of the Main Building. The Review Group is satisfied, therefore, that this arrangement on its own would not be sufficient to enable the College to continue to operate from its present site ‘in an affordable and sustainable form’.

**Option 5: that the College should share its site with the Bristol Baptist College**

- 8.24 Bristol Baptist College is part of the Bristol Federation for Theological Education. Its Principal is the Revd Dr Stephen Finamore. We noted earlier (see paragraphs 5.25 and 5.26 above) Dr Finamore’s very positive comments about Wesley College and his

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<sup>138</sup> We have indicated elsewhere in our report that Frances Greeves House is currently used by students of colleges belonging to the Bristol Federation for Theological Education and to students of Bristol University.

expression of interest in the two colleges working closer together and perhaps sharing a site.

- 8.25 At the request of the Review Group, Dr Pye has held preliminary conversations with Dr Finamore to establish whether there may be a basis for entering into formal discussions about sharing a site. We are advised by Dr Pye that Bristol Baptist College is willing to enter into formal discussions concerning the possibility of shared provision, the preferred site being the site currently occupied by Wesley College, with significant investment in the development of new learning and teaching facilities.<sup>139</sup> It has been made clear to Dr Pye, however, that a precondition for a move to a shared site must be that the Methodist Church nationally<sup>140</sup> can demonstrate that it would be a reliable partner with a commitment to Wesley College<sup>141</sup> and theological education in Bristol and that adequate protection could therefore be given to any Baptist investment.
- 8.26 Bristol Baptist College operates from premises in Clifton, Bristol, which it owns but which no longer provide adequate teaching space or resources to meet current and projected needs. In the event that agreement could be reached about the sharing of premises, it is likely that the premises at Clifton would be sold. It is understood that in addition to making additional revenue available as a part of any such sharing arrangement it is likely that there would also be a capital investment of somewhere in the region of £1m.
- 8.27 The Review Group is of the opinion that further exploration of a sharing of the present site by Wesley College and the Bristol Baptist College has much to commend it. It is ecumenical. It would strengthen the provision of theological education not only in Bristol but in the South & South-West Region. It would provide opportunities to develop new courses, to strengthen existing partnerships and to initiate new ones. It would not only enable the College to fulfil its Conference-agreed vocation as the core institution in the South & South-West Regional Training Network but would be likely to enhance the services and support it could offer to the Regional Training Network and to the Methodist Training Forum.
- 8.28 Whilst such a development would have much to commend it, the projected inflow of capital (£1m) would not be sufficient to enable the College to undertake the

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<sup>139</sup> Although any commitment at this stage would be to a sharing of premises, Bristol Baptist College is willing to explore future organic union within an agreed timescale as a serious possibility.

<sup>140</sup> The necessary assurance would need to be given by the Methodist Council as Managing Trustees of the site and the body with responsibility for oversight and governance of the College.

<sup>141</sup> Such commitment would need to be for a minimum of 5 years. There would need to be appropriate safeguards to protect the Baptists' investment.

refurbishment of the Main Building which, as Section 7 of our report makes clear, is much needed. The Review Group is satisfied, therefore, that this arrangement on its own would not be sufficient to enable the College to continue to operate from its present site ‘in an affordable and sustainable form’.<sup>142</sup>

### **Option 6: that the College should continue on the present site and should develop the Conference Centre**

8.29 We noted earlier in our report the setting up in 2007 of Wesley Conference Centre Ltd. That company was set up to take legal responsibility for the commercial element of the College’s activities. Part of that commercial element is the occasional use of the College’s surplus capacity as a Conference Centre. As a contribution to our review, a sub-committee of the College Council<sup>143</sup> has explored the possibility of expanding the Conference Centre facilities at the College. The full report of that sub-committee is set out at Appendix 11.

8.30 The sub-committee’s proposal highlights the unique material contained within the Methodist Heritage Collection held by the College and suggests that ‘Their potential is particularly significant with Bristol also containing the New Room, the oldest Methodist chapel in the world, and Charles Wesley’s house’. The sub-committee’s report envisages the utilisation of the Heritage Collection, together with the College’s library, in partnership with the New Room and Charles Wesley’s House, as a basis for expanding the current Heritage courses already offered by the College and for exploiting the potential for Heritage tours and weekends and other Heritage ‘markets’. As part of this vision it would be necessary to undertake the refurbishment of the facilities currently available in the Main Building.

8.31 In the course of its work the sub-committee took professional advice in order to assess whether this option has any real commercial potential.<sup>144</sup> The advice received was sufficiently positive to persuade the sub-committee to prepare the report which appears as Appendix 11 and to seek to persuade the Review Group to explore the matter further.

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<sup>142</sup> Without detailed information concerning the financial position of the Bristol Baptist College it is not possible to consider in detail the financial viability (in revenue terms) of Wesley College and Bristol Baptist College moving to a completely new site (purchased or leased). However, we consider it likely that such a move would face similar revenue difficulties to those set out in Appendix 10.

<sup>143</sup> The sub-committee has been chaired by Christine Stones, a member of the Review Group

<sup>144</sup> That advice was obtained from Ms Jo White, Executive Director of Co-Operative Futures.

8.32 The Review Group accepts that there are likely to be significant as yet untapped marketing possibilities for the College given its possession of the Heritage Collection and the fact that it is situated in a World Methodist Heritage City. However, the Review Group is satisfied that this proposal on its own would not be sufficient to enable the College to continue to operate from its present site ‘in an affordable and sustainable form’.

### **Option 7: that full-time ministerial students should be trained at the College**

8.33 The Review Group accepts that the process of reviewing training institutions in 2006 and 2007 was a painful process. We also accept that the Conference would be unlikely to welcome the suggestion that its decisions concerning the future of training institutions should be re-visited quite so soon. However, having undertaken a thorough and detailed review of the College and of the factors which led to the decision that the College should be subjected to further review, we consider that it would be remiss of us if we failed to highlight steps which could have been taken by the Conference which would not only have enabled the College to continue to play a key role as a provider of training for the whole people of God – in Bristol, in the South & South-West Regional Training Network and nationally – but which would also have reduced the current burden on the connexional training budget.

8.34 It is demonstrably the case that the present financial predicament of the College – and thus its need for supplementary support from the Connexion – is the direct result of the adoption of a policy which provided that full-time ministerial students should not normally be trained at the College and which also replaced the block grant with core funding.

8.35 During the year 2009-10, 104 students distributed over 14 institutions, will be undertaking initial ministerial learning at an overall cost of £1,469,614. This includes core grants amounting to £804,429, £149,000 towards fixed costs, and compensation to four institutions (including Wesley College) amounting to £100,000. Had preference in assigning full-time ministerial students been given to Methodist Institutions, namely Wesley House, Cambridge, Wesley Study Centre, Durham and Wesley College, Bristol (which has suitable accommodation for 27 residential students), and funding restricted to only those institutions allocated students for initial ministerial learning, the cost of initial

ministerial learning in 2009-10 could have been as little as £975,393.<sup>145</sup> The average cost per student would have fallen from £14,131 to £8,632.<sup>146</sup> Such a policy would not preclude placing students at colleges owned by ecumenical partners but would demonstrate intent to maximize the use of Methodist assets.

- 8.36 Although this would reduce student choice, we consider that in times of decreasing numbers of students offering for training for ordained ministry and increasing pressure on connexional budgets, the need to be sensitive to student choice must be balanced against the need to be good stewards of the Church's limited resources. We have firmly in mind the understanding of stewardship outline by Professor Reed in Appendix 5. We also note the observation made in the 2005 Conference report *The Nature of Oversight* that 'Good stewardship entails the wise use of resources, material and human. It may not always mean choosing the cheapest option. It involves seeking effective and efficient ways of working. It means minimizing waste...'<sup>147</sup> The corollary implies maximizing the use of assets, and not favouring other external providers of services.

### **Option 8: that Wesley College be closed**

- 8.37 We have already noted the assurances given to the College both generally within the 2006 report and specifically by the former General Secretary of the Methodist Church<sup>148</sup>, that there was no proposal that the College should be closed.
- 8.38 Having made that point, the Review Group also wishes to acknowledge that in evaluating whether the time has come when the College should be closed, sentimentality has no place. In Section 2 of our report we describe occasions in the past when the Conference has been invited to consider whether the College should be closed. The fact that on those occasions the Conference was not persuaded that closure was appropriate does not mean that we should not recommend closure now if the evidence we have gathered points unerringly in that direction.
- 8.39 Both the 2006 and 2007 reports saw a future role for the College, albeit that that role did not include the training of full-time ministerial students. The Conference has decided that there has to be a core institution in the South & South West Region. It has decided

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<sup>145</sup> The detailed calculation of these figures is set out in Appendix 10.

<sup>146</sup> We accept that this saving is not immediately achievable as it disregards existing commitments. It is also accepted that the averages can be criticised for covering both full-time and part-time students, but the error is consistent.

<sup>147</sup> 2005 Conference Agenda p.110 para 4.5.2

<sup>148</sup> See footnote 121 above.

that Wesley College, Bristol, should fulfil that role. The evidence we have gathered makes it clear that the College is fulfilling that role conscientiously and ably. Importantly, the evidence we have gathered also makes it clear that there are no other institutions in the South & South West Region ready, able and willing to take on this role. Closure of the College would leave a vacuum. The Review Group is not immediately clear how that vacuum would be filled.

- 8.40 Despite the last few years of uncertainty and planning blight, the College has been able to launch new courses, initiate new partnerships, develop existing partnerships and generally enhance its reputation as a centre of excellence for theological education in the region. In the past, concerns have been expressed about the consequences of complete withdrawal from a particular region.<sup>149</sup> Notwithstanding the changes in training strategies approved by the Conference, it is the judgment of the Review Group that those past concerns are still valid concerns.
- 8.41 Furthermore, in evaluating the option of closure it is important to bear in mind the likely difficulties that would be faced in achieving an early sale of the site (see paragraphs 7.20 to 7.24 above) and the management responsibilities involved achieving an orderly run-down of the work of the College. There is a real risk that closure of the College could leave the Methodist Council with a millstone around its neck.
- 8.42 Having said all of that, we recognise that in the absence of a change of direction by the Conference so far as its training strategies are concerned, the options for securing the financial future of the College are limited.

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<sup>149</sup> See, for example, the 1998 Connexional Training Strategies report, *Implementing the Making of Ministry Report and Concept 2000*.

## SECTION 9: THE REVIEW GROUP'S RECOMMENDATIONS

- 9.1 Our terms of reference require us 'To bring to the Methodist Council...*a proposal* for the future of Wesley College' and 'To outline an implementation process once the review report has been approved by the Methodist Council, to be completed no later than August 2011.' In this section we set out our proposal. Before doing so, we seek to draw together the many threads that have been woven together to form this report in order not simply to justify our proposal but also to contextualise it.

### **Drawing the threads together**

- 9.2 As Professor Reed has reminded us (see Appendix 4) John Wesley knew the importance of good stewardship of resources. In Sermon 51, 'The Good Steward' he wrote
- 'Before all these, even the whole human race, before the devil and his angels, before an innumerable company of holy angels, and before God the Judge of all, thou wilt appear, without any shelter or covering, without any possible disguise, to give a particular account of the manner wherein thou hast employed all thy Lord's goods!'
- 9.3 The Methodist Church has a duty to exercise responsible stewardship of its resources. That is a duty owed to the whole of the Church and not simply to one part of it. Our connexional life requires no less. As we consider the future of Wesley College it is important, therefore, to have regard to the wider picture and not just to local needs.
- 9.4 The reference to 'resources' should not automatically prompt us to think of financial resources. The land and buildings occupied by Wesley College do, of course, have a monetary value; and yet they are also a resource in themselves. Historically, they began as a base from which to provide theological education for those training for ordained ministry, yet that is not necessarily the only purpose (indeed, today it is not even the main purpose) to which they can be put in order to support and enhance the working out of the mission objectives of the Methodist Church.
- 9.5 Moreover, the resources of Wesley College are not confined to its land and buildings. They include a Heritage Collection which is one of the treasures of the Methodist Church; a theological library which is one of the finest in the country; and a network of partnerships that have helped to foster and enrich the provision of theological education in the South & South West Region and an existing lively programme of theological education and a role in vocational discernment from which many continue to benefit. The duty to exercise responsible stewardship applies to all of the resources located at and collectively referred to as 'Wesley College, Bristol'.

- 9.6 We have earlier set out in some detail the history of Wesley College (see Section 2). That story, too, is part of Methodism’s rich heritage and deserving of responsible stewardship. It bears testimony to the dedication of the many men and women who over the course of more than sixty years have committed themselves to the task of providing good quality theological education for the benefit not only of the hundreds of students who have passed through their hands but also for the benefit of the whole Church.
- 9.7 Understanding the story of Wesley College is also important in the context of catching a vision for the future, for the story of the rise and development of Wesley College is not the result of chance but of the leading of the Spirit. The task for the Church today is to discern where the Spirit is leading now. We need a new vision.

**A new vision**<sup>150</sup>

- 9.8 In her supplemental report (see Appendix 5) Professor Jennifer Bone sets out a radical and challenging vision of what Wesley College might become.
- 9.9 Professor Bone notes that our terms of reference require us to bring forward ‘a proposal for the future of Wesley College which...enables it to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network...’ She expresses her personal opinion that ‘it seems highly improbable that Wesley can have a secure long term future in this capacity alone’. The Review Group agrees with that assessment.
- 9.10 Professor Bone moves on from that proposition to set out her vision for the future of Wesley College. The whole of her paper needs to be read in order fully to appreciate the rationale that underpins her vision. However it is appropriate to repeat here the helpful summary with which she begins her paper. She says that:
- (1) In the contemporary educational, cultural, social and policy environment in the UK, the Churches will need to give increasing attention to nourishing faith-based theological education, at a level and in a manner commensurate with the norms and standards of higher and further education.
  - (2) The staff of our theological colleges have worked tirelessly and magnificently in recent years to cope with uncertainty and implement change, to achieve results with diminishing resource, to incorporate skills’ training in ministry, in accordance with Methodism’s in-house agenda. There has been much attention to nurturing the strength and identity of Methodism.

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<sup>150</sup> This sub-section of our report (paragraphs 9.8 to 9.19) represents the views of six of the seven members of the Review Group

- (3) At the same time, ‘the people of God’ find themselves living in a world in which their faith, belief and all that flow from them are increasingly under question and too readily assumed to lack intellectual credibility, on the assumption that their faith has not been subject to rigorous inquiry nor has met the demands of impartial analysis. There is an urgent need for the Churches to give as much weight to the needs of lay people in this respect as to those in ministry.
- (4) This is essentially a matter of providing appropriate educational opportunity. Universities and colleges today are well versed in this type of ‘short course’ provision for both specialists in a field and for the wider community in a way which enables them to keep pace with a fast changing knowledge environment. It can be done.
- (5) The proposal embodied in this paper is that the circumstances of Wesley College now offer the potential for the Church to address this need. It could only be done by an institution with the university links to keep its feet on the academic ground, as it were; to be practicable its work would need to be offered nationally, and to all churches, and indeed it would necessarily become involved in international links. The Methodist Church would need to trust it educationally, and guarantee it sufficient operational freedom. On the first of these, the Church has a proud record.
- (6) This is not primarily a matter of seeking to sustain public influence (although, arguably, only the laity operating within their various spheres can now do this). It is primarily a matter of using the Church’s resources to offer lay people depth in understanding of their faith and of the educational riches which have been, and continue to be, brought to bear upon it.

9.11 This vision raises four fundamental questions which must be faced honestly, critically and fairly. Although the Review Group considers it to be within its terms of reference to provide tentative answers to those questions, we accept that these questions can only be answered definitively by the Conference.

9.12 The first question is: is there a need for a national centre for theological education such as that proposed by Professor Bone? Professor Bone has eloquently argued the case for such a centre. The Review Group considers her reasoning to be persuasive and convincing and is content to adopt it. The creation of such a centre would be a radical departure for the Methodist Church. However, it should not be ruled out on that basis.

Before coming to a concluded view on the first question it is important to consider the second.

- 9.13 The second question is: is a national centre for theological education consistent with the Methodist Church's current training strategies? In Section 3 of our report we set out an overview of the reports *Future Use and Configuration of Training Institutions* (2006) and *Talking of God, Acting for God: Report of the Training Institutions Review Group* (2007). We noted that both of those reports underline the importance of the learning and development of the whole people of God and recognise the increasing importance of providing training opportunities more widely for the whole people of God. Although it is undoubtedly true that the 2006 and 2007 reports did not propose the creation of a national centre such as that now proposed by Professor Bone, we regard that as unsurprising given the context in which those two reports were written. As we noted earlier, one of the key drivers leading to those reports was the need to reduce the cost of training. However, as we have already noted, those reports clearly, repeatedly and, in our judgment, properly underline the importance of providing training opportunities for the whole people of God. We consider that the creation of a national learning centre is, therefore, consistent with current training policies.<sup>151</sup>
- 9.14 The third question is this: if the creation of a national centre for theological education is consistent with existing training strategies, why should that centre be located at Wesley College, Bristol, rather than at one of the other training institutions supported by the Methodist Church?<sup>152</sup>
- 9.15 Professor Bone herself identifies some answers to this question. She points to the quality of its library which she says 'must now be one of the best theological libraries in the country'. She notes that it has 'extremely valuable Methodist archive material' and says that it would be 'a tragedy if this was lost to a less accessible environment'. She points to the College's conference capacity. She also points to the College's ecumenical links and expresses the view that 'it seems very possible that such a focus on lay education would meet with a co-operative response from other church bodies'. She points to the College's

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<sup>151</sup> We have already noted references in the 2007 report to the important role that Regional Training Networks have within the general scheme of connexional training strategies (see, for example, paragraphs 3.20 and 3.25 to 3.28 above). We also note that the 2006 report referred to 'an opportunity to make learning resources available to the whole Church at district and circuit level in a more widespread and systematic way than before...' (paragraph 3.4.6). The Review Group considers that the kind of national centre now proposed would not stand in conflict with those regional and local training strategies but would provide opportunities to enhance and underpin them.

<sup>152</sup> We considered it to be outside our terms of reference to undertake a comparative exercise involving the other training institutions currently funded and supported by the Methodist Church, our terms of reference requiring us to 'bring a proposal...for the future of Wesley College...'

excellent links with the University of Bristol. So far as this point is concerned it is appropriate to bear in mind the very positive comments received from Professor Gavin Da Costa during the course of our consultation process (see in particular paragraphs 5.13 to 5.15 above). She refers to Bristol's Methodist heritage and makes the point that 'In British Methodist history, Bristol is second only to Oxford (and many would argue equal to, or ahead of it!); the point is the potential for generating research and conference interest internationally.' So far as this point is concerned we have noted the efforts the College has already made to foster and develop international interest (see paragraphs 4.20 to 4.23 above).

- 9.16 We agree with Professor Bone's analysis. There is one additional point which we regard as fundamental. We have noted several times throughout our report the fact that Wesley College is now the only theological college for initial ministerial learning under the immediate governance of the Methodist Council and whose site is under the exclusive ownership of the Methodist Church in Great Britain. This provides the Methodist Church with what is probably an unrepeatable opportunity to be creative and innovative in the provision of theological training for the whole people of God. We say 'probably an unrepeatable opportunity' since if Wesley College were to be closed and the site sold and if the membership of the Methodist Church in Great Britain continues to contract, it is highly unlikely that the Church would in the future be able to consider such a venture as that now proposed
- 9.17 At paragraph 3.18 above we noted that the 2006 report had considered the possibility of establishing a single institution as the only training institution designated to receive full-time residential students but had discounted that possibility on the basis that it 'would be too risky a step to take. It would amount to putting all our future educational resources into one basket.' The report did not attempt to describe or analyse that risk. It is therefore difficult for us to evaluate whether the same concerns would apply to the kind of national centre proposed by Professor Bone. However, the key risk is likely to be financial and that is a risk which can be robustly assessed as part of any implementation process. The initial financial impact assessment undertaken in Appendix 10 of our report suggests cause for optimism on this issue.
- 9.18 During the course of the Review Group's deliberations an issue arose as to whether the College's mission is to be understood as having been confined by the Conference to its 'Conference-agreed vocation as the core institution in the S & SW Regional Training Network' or whether its mission may properly be regarded as being wider. If it is so

confined then we accept that the proposal for a national centre of theological education is outwith the College's vocation as presently defined. However, we do not consider that in identifying the College as having a vocation as the core institution in the South & South West Regional Training Network the Conference was in fact seeking to confine the mission of the College.<sup>153</sup> Appendix 10 demonstrates clearly that to confine the mission of the College to that single vocation would inevitably be to consign the College to early closure since if that were its only vocation it could not be financially viable. We have noted at various points throughout our report the assurances that have been given confirming that that was never the intention. In our judgment, in allocating to Wesley College the role of 'core institution' in the South & South West Regional Training Network the Conference was simply bestowing upon the College an additional vocation.<sup>154</sup>

- 9.19 The fourth question is: how is the duty to exercise responsible stewardship to be balanced against the apparent calling to pursue a new vision? Responsible stewardship of resources may properly lead to caution and a conservative approach to the commitment of those resources to new work. Yet the reality is that to accept the challenge of the Gospel is to accept the call to take risks – not recklessly or speculatively but responsibly and judiciously in response to the prompting of the Spirit. In this case, the proposal we are about to make is likely to involve the taking of risks. However, an important part of the task of an Implementation Committee will be to undertake a detailed assessment of that risk in order to determine whether, in the exercise of responsible stewardship, it is a risk worth taking.

#### The Review Group's Proposal

- 9.20 In Section 8 we outlined and, in most cases, discounted a number of possible options. We accepted that there is merit in option 4 (that the work of Methodist International House, Bristol, be merged with the work of the College), option 5 (that the College should share its site with the Bristol Baptist College) and option 6 (that the College should continue on the present site and should develop the Conference Centre) but concluded that none of those three options, taken individually, would provide a viable

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<sup>153</sup> One member of the Review Group disagreed, believing that the Conference had effectively established a regional vocation and mission for the College.

<sup>154</sup> We noted earlier that at a meeting held on April 9<sup>th</sup> 2008 between the then General Secretary of the Methodist Church, the Principal of the College and the Secretary of the Wesley College Council expressly confirm that 'The sole objective of the Review is to ensure that the College can fulfil its core purpose as the lead institution in the South West Regional Training Network...as established by the Methodist Conference, in an affordable and sustainable form in the future'.

option for the future of the College. However, Appendix 10 demonstrates clearly that when combined together ('the combined option'), these options merit further consideration.

- 9.21 Appendix 10 of our report contains a financial impact assessment of this combined option. Though inevitably based upon provisional figures and best estimates, the assessment appears to demonstrate that there is good reason to believe that this option could prove to be financially viable. The assessment shows an excess of income over expenditure to an extent which suggests some resilience. The assessment also provides good grounds for believing that the capital required to undertake necessary works of modernisation and repair to the existing structures could be found without putting pressure on already overstretched budgets.
- 9.22 This combined option has ecumenism at its heart. It would enable our two churches (Methodist and Baptist) not only to continue to offer the theological training which they already provide but to expand the scope of that training. It would enable the College to continue in its role as the 'core institution' in the South & South West Regional Training Network. It would also provide a sound base upon which to build the kind of national centre for theological education proposed by Professor Bone. The new college would continue to provide initial ministerial learning for Methodist ministerial students, though, as now, it is likely that this would account for only a small proportion of its work. There would also be provision of initial ministerial learning for Baptist ministerial students. This would form a larger proportion of the work of the College. The new college would also provide other learning programmes for partner denominations and for 'the whole people of God' in accordance with the vision outlined above. This would have the objectives of equipping Christians in the region for discipleship and mission, safeguarding, developing and utilising the Heritage Collection and library and providing resources and learning opportunities to local, regional, national and international students. This is likely to lead to an expansion of the number of courses currently offered by the College and would together form a large proportion of its work.
- 9.23 The combined option would enable the development of the existing Conference Centre facilities. This would enable the College not only to exploit the benefits of its location at the heart of a World Methodist Heritage City but would also enable it to extend the College's existing programmes in the way described in Appendix 11. This would be an important part of the mission of the College.

- 9.24 The work of Methodist International House has been fruitful over many years. Each year it offers accommodation to postgraduate students from over 25 countries. It has provided a much needed resource to international students coming to the City to study. The continuation of that work as part of the combined option would not simply be a means of income generation for the College but would enable the continuation of a valuable work that is undertaken in the name of the Methodist Church
- 9.25 For all of these reasons the Review Group is satisfied that the combined option has merit as a practical and feasible plan for the future of the College and that it would be appropriate and proportionate for an Implementation Committee to be appointed to further explore the viability of this option with a view to bringing to the Methodist Council a coherent and costed plan for its implementation.
- 9.26 The composition of the Implementation Committee will need to be multi-skilled. It will in particular require skills in finance, property, business, project management and theological education. The Principal of the College should be a member of this Committee. The Committee should be ecumenical and must in any event have within it a representative of the Bristol Baptist College or their nominee. It will need good administrative support. This will amount to more than the provision of someone to convene and attend Committee meetings and take minutes. It will require someone with the skill and experience to take forward the work of the committee, for example in liaising with professional advisers. If this Committee is under-skilled or under-resourced the overwhelming likelihood is that it will not be able to complete its task. The final requirement for members of the Committee is that they should understand the vision and that they should come to their task with an open mind.
- 9.27 The work of the Implementation Committee should be time limited. It should be allowed twelve months to complete its work. During that time it should be required to report on progress quarterly to the Methodist Council. The time limit of twelve months should only be extended by the Methodist Council if the Committee is able to demonstrate that there is some positive and compelling reason for doing so.
- 9.28 The Review Group considers that the combined option meets fully the aim of this review set out in our terms of reference and recommends that option to the Conference.

**And finally**

- 9.29 The Review Group believes that it has considered all reasonable options. We also believe that the combined option is the only credible option that it is appropriate to pursue. If our recommendation is not accepted by the Conference, or if the proposed

Implementation Committee is unable to bring this option to fruition, the Review Group concedes that in those circumstances the closure of the College would be the only other alternative. In the event that that should be the ultimate outcome it is the hope of the Review Group that closure would be handled sensitively and compassionately, with due regard to the legitimate interests and concerns of all of those who work at the College (both academic and other staff), to the entitlements of those who are then enrolled on courses run by the College, and to the partnerships from which the College would have to withdraw. In the event of closure of the College we consider that the provision of appropriate pastoral care for those principally involved would be an essential and absolute requirement.

## Appendix 1: Terms of Reference for the Review Group

### 1. Aim of the Review

- 1.1 To bring to the Methodist Council in April 09 a proposal for the future of Wesley College which:
- (a) enables it to fulfil its Conference-agreed vocation as the core institution in the S & SW Regional Training Network, in an affordable and sustainable form;
  - (b) identifies in general or specific terms the geographical location and context of the College and its institutional form [e.g. buildings, assets, staffing, resource-facilities] – having thoroughly reviewed and costed a range of reasonable options.
  - (c) Recommends the key partnerships which are to be sustained, developed or initiated for the College to fulfil its mission.
- 1.2 To outline an implementation process once the Review report has been approved by the Methodist Council, to be completed no later than August 2011.

### 2. The Method of the Review

- 2.1 A Review Group to be formed, constituted as follows:

An independent chair

3 members appointed by the SRC

3 members appointed by the Wesley College Council.

[The formation of the Review Group will proceed in a consultative manner between the SRC and the Wesley College Council to ensure that among the membership of the Group there is an appropriate range of skills and expertise]

- 2.2 The Review Group shall be responsible for the Review and shall report to the Methodist Council via the SRC.
- 2.3 The Review Group will be offered appropriate administrative and research support by the Connexional Team.
- 2.4 The Review Group is required to consult widely and especially to include in their consultations the College Principal, the College staff, the Wesley College Council, the S & SW Training Forum, the University of Bristol and other existing ecumenical and educational partners, the Chair of the TSRE and the relevant staff in the Connexional Team.
- 2.5 The Review Group is requested to consult the SRC and the Wesley College Council on emerging significant themes at any point during the Review.

3. The College during the period of the Review and its implementation

- 3.1 The College will be sustained in its present form and functions, to a level to be negotiated, from the Training Designated Fund, during the period of the Review and its implementation.
- 3.2 The College is expected to continue its processes of course development and course delivery (in response to emerging needs in the S & SW Training Region) and to manage existing agreements with users of the premises during the period of the Review and to transfer and adapt its responsibilities, as required, during the transitional period of implementation.
- 3.3 The Methodist Council and the Wesley College Council (through the District Chair or someone appointed by the Chair) will have a special responsibility for the care and support of staff at Wesley College.

**Appendix 2: Area covered by the South & South-West Regional Training Network**



Area covered by the South West Regional Training Network

Reproduced from Ordnance Survey map data by permission of the Ordnance Survey © Crown copyright 2001

### **Appendix 3: List of Consultees**

Revd Dr Jonathan Pye, Principal, Wesley College, Bristol  
Dr John Emmett, Director of Programmes and Research, Wesley College, Bristol  
Dr Mervyn Davies, Associate Tutor, Wesley College, Bristol  
Mr Russell Buley, Chair of the Methodist Training Forum, S & SW Regional Training Network  
Revd Dr Stephen Dawes, Methodist Oversight Tutor, South West Ministry Training Course  
Revd Preb Dr Graham Dodds, Principal, Bath and Wells School of Formation  
Revd Alison Tomlinson, President Designate and Chair of the Northampton District  
Revd Andrew Wood, Chair of the Southampton District  
Ms Susan Graham, Training Officer, Bristol District  
Professor Gavin D'Costa, Professor of Christian Theology, University of Bristol  
Professor Esther Reed, Associate Professor of Theological Ethics, University of Exeter  
Rt Revd Declan Lang, Bishop of the Roman Catholic Diocese of Clifton  
Revd Dr Stephen Finamore, Principal, Bristol Baptist College  
Revd Canon George Kavoor, Principal, Trinity College Bristol  
Revd Dr Mike Parsons, Principal, West of England Ministerial Training Course  
Revd Canon Dr Peter Sedgwick, Principal, St Michael's College, Llandaff  
Mr Doug Swanney, Head of Discipleship and Ministries in the Connexional Team  
Revd James Booth, Chair, Training Strategy and Resources Executive  
Professor Jennifer Bone, Pro-vice Chancellor Emeritus, University of the West of England  
Ms Charity Hamilton, Student Officer (Church Life), Wesley College, Bristol  
Mr Peter White, Chair, Wesley Conference Centre Ltd  
Revd Dr Wendy Kilworth-Mason, Training Officer, Cornwall District

## **Appendix 4: Theological Reflections**

*Professor Esther Reed*

Section 3 of the report *Future Use and Configuration of Training Institutions*, presented to the Conference in 2006, spoke of ensuring that Methodist students in training ‘have opportunity to reflect on all aspects of their training from a Methodist perspective’. It recognized the need for ordinands to understand ‘not merely Methodist history, theology and polity, but what it means for them to live as a representative people within that tradition’ (para 3.6.3). There was an emphasis on education for the whole people of God as well as ordinands. How to meet this imperative together with the exercise of responsible stewardship is a major challenge for British Methodism today. This paper attempts to assist the Review by articulating these challenges as integral to what it means to live as a Church with mission at its heart.

### **Good stewardship of resources**

John Wesley knew the importance of good stewardship of resources. In Sermon 51, ‘The Good Steward’ he wrote:

‘Before all these, even the whole human race, before the devil and his angels, before an innumerable company of holy angels, and before God the Judge of all, thou wilt appear, without any shelter or covering, without any possibility of disguise, to give a particular account of the manner wherein thou hast employed all thy Lord's goods!’<sup>155</sup>

Good stewardship entails the appropriate use of money, talents, bodies, faculties of the mind, etc. Regarding money, which, says Wesley, is unspeakably precious, we are to ‘employ every part of it for such purposes as our blessed Lord has commanded us to do’. Far from dismissing money as ‘filthy lucre’ and the agonizing of decision-makers about financial prudence as ‘worldly’, Wesley regards money as a primary issue in our corporate life; a means through which fellowship and mission are realized.

Recognition that responsible use of money is more than incidental to our ecclesial life together does not, of itself, guarantee wisdom on the part of decision-makers. It does, however, offer a word of encouragement to all in authority who seek to develop ‘the right kind of relation

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<sup>155</sup> John Wesley, ‘The Good Steward’, Sermon 51 (1768). Text from the 1872 edition - Thomas Jackson, editor. Available at: <http://new.gbgm-umc.org/umhistory/wesley/sermons/51/2/> (accessed 19 Sept. 2009).

between discourse about money and Christian life'.<sup>156</sup> Stewardship of resources that is practically and intelligently Christian will be founded on the generosity of God's engagement with creation and his purposes for salvation. The Christian calling is to follow after God's own 'logic' for his glory and the benefit of others (2 Cor. 8:7).

### **Learning and the Formation of Leaders**

Recent years have seen much discussion about models of Christian learning and formation: 'accredited learning versus more flexible formation; professional discharge of duty versus inhabited wisdom; and learning for all versus the equipping of the ordained'.<sup>157</sup> Most churches in the UK are demonstrating a laudable desire for a 'both/and' rather than 'either/or' approach to training. Even so, the many and complex pressures on colleges, courses and schemes, not to mention the pressures on those bearing high-level institutional responsibilities, make this a difficult time in which to exercise discernment about how best to share educational resources across the Connexion.

Tension between different models of learning is not a new phenomenon. David Kelsey's book *Between Athens and Berlin* describes a familiar tension in Christian tradition between the 'Athens' model which focuses on the formation of character consonant with Greek notions of *paideia* (education as formation) and the 'Berlin' model based more on critical scholarship and professional training.<sup>158</sup> This is not the place to pursue issues that arise from this contrast. Suffice it to say that the time is ripe for those with responsibility for the training/formation of Methodist students to find a proper interwovenness of the diverse aspects of training in order to reflect the integrity of the gospel, and to dig deep in our tradition for wisdom to contribute to ecumenical debate. Recent – and, we believe, welcome – questioning of the modern 'Berlin' model emphasizes that a good education in any discipline equips students to think critically within a tradition; critical reasoning is learned within a given context or grammar, and hence can never be understood in an abstract, neutral or instrumental sense.<sup>159</sup> Learning to speak a foreign language requires immersion in its grammar and vocabulary; living in the country that speaks this language entails deep learning of its customs and virtues, and not merely the acquisition of knowledge.

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<sup>156</sup> Daniel W. Hardy, 'Theology of Money' in *Finding the Church* (London: SCM, 2001), p. 114.

<sup>157</sup> Helen Burn, 'Learning and Formation' as yet unpublished mss to be submitted on the PhD programme the University of Exeter.

<sup>158</sup> David Kelsey, *Between Athens and Berlin* (Grand Rapids, MI.: William B Eerdmans Publishing Co, 1993).

<sup>159</sup> E.g., Bernd Wannewetsch, *Political Worship: Ethics for Christian Citizens* (Oxford: OUP, 2004).

In other words, today's post-liberal alternatives to the 'Athens' versus 'Berlin' debate remind us that a theological education requires formation in a particular tradition; to think theologically is to reason in a tradition. This is not to imply that it is never appropriate to depart from what has been learned. 'Innovation is necessary because no stone is the same nor is any significant story finished'.<sup>160</sup> The point is rather that leading theological voices today are urging those with responsibility for education and ministerial learning to take seriously why and how the formation of critical, innovative and visionary leaders demands learning rooted in a history and tradition. Citing this seam of scholarship rather than another is not of itself neutral. The context in which this review finds itself is one in which the many benefits of accredited and inter-denominational training in our various colleges, courses and schemes, have been seen by some to have been delivered at the cost of exposure to the richness of our theological witness and heritage. The 'Methodist bit' of the course is seen by some to be squeezed into the syllabus where space permits. Of course, formation as a Methodist minister as distinct from an Anglican deacon and priest or Baptist pastor is not to learn an entirely different language. Yet neither is it to be trained *in abstracto*. 'A child' said Wittgenstein, 'has much to learn before it can pretend'. A Methodist minister has much to learn before he or she can assume wise leadership in this peculiar tradition.

### **Being in Connexion**

An emphasis on tradition should not be equated with conservatism. Change is not something that Christian people need necessarily fear; at their best, tradition and innovation are not in conflict but comprise a creative interplay between that which is given and the promptings of the Holy Spirit in and for a particular time and place. Paradoxically, the great innovators are often those inculcated most richly in a tradition. Attempts to discern God's will are always, of course, undertaken amidst particular circumstances and in particular contexts. For a connexional, Methodist people, the challenge of discernment bears a certain character and takes a particular form: How are we to conceive of connexional life in the Methodist Church of Great Britain as the condition for the realization of the purposes of God? What about *being in connexion* enables the Methodist people to discern and embody both the extensity and intensity of God's purposes for our particular situation(s)? What is our vision for embodying 'our calling' locally, regionally, nationally and internationally?

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<sup>160</sup> Stanley Hauerwas, *The State of the University: Academic Knowledges and the Knowledge of God* (Oxford: Blackwell, 2007), p. 115. He uses the image of stone carving to speak of the education process.

The rhetoric of ‘connexionalism’ can become so generalized that it becomes simply a covering for every decision and practice. Warning notes must be sounded against any idealization of connexional life. A further danger is to point to what are thought to be ‘true’ characteristics of connexional life and require all who would call themselves Methodist to agree. This narrow and dogmatic approach is rarely found in British Methodism today though was common in the early years.<sup>161</sup> More common is the wide and fuzzy approach that remains vague about how we are accountable one to another. We drop to the level of ‘getting on together as best we can’ which is far from the wisdom that allows us as a people to be moved forward by the life and purposes of God.<sup>162</sup>

Yet our connexional life requires accountability to one another for the various dimensions of our life together; the ‘bonds of connectedness’ by which we are joined can entail difficult decisions.<sup>163</sup> Analogous to the selection criteria for ordained ministry,<sup>164</sup> it is arguable that we need to keep certain key considerations in mind when thinking about the future use and configuration of training institutions. The following recommend themselves as especially pertinent to this Review:

- ‘Education has been characteristic of the Methodist movement from the beginning and continues to be vital for effective ministry’.<sup>165</sup> Is every region of the Connexion provided for adequately such that ministerial students and ordained ministers engaging in continuing ministerial learning have ready access to biblical scholars and theologians, library resources and tutors, who will share with them as people of faith?
- God has called our ministerial students and lay people to serve as leaders in the Church of Jesus Christ. Does their training give ample opportunity for access to Methodist tradition and the cutting edge of Methodist theology today, as well as to the richness of ecumenical exchange?
- Training institutions are vital parts of the Methodist Connexion. Are there opportunities for co-operation between the colleges, courses and schemes – e.g., on-line access to the

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<sup>161</sup> See Stephen Tomkins on John Wesley’s authoritarianism: ‘Joining Wesley’s Connexion was very much like being bought out by a national corporation’. *John Wesley: A Biography* (Grand Rapids, MI.: Eerdmans, 2003), p. 141.

<sup>162</sup> Drawn from Hardy, *Finding the Church*.

<sup>163</sup> Brian E. Beck, ‘Some Reflections on Connexionalism’ in *Epworth Review* 18(2) 1991, pp. 48ff.

<sup>164</sup> *Selection Criteria for Ordained Ministry in the Methodist Church* available at: [www.methodist.org.uk/downloads/can\\_Selection\\_Criteria\\_for\\_Ordained\\_Ministry280808.doc](http://www.methodist.org.uk/downloads/can_Selection_Criteria_for_Ordained_Ministry280808.doc) (accessed 20/09/09).

<sup>165</sup> Citing from *The United Methodist Guidelines: The Board of Ordained Ministry Handbook: Guidelines for Continuing Education*, Chapter 22. Available at: [http://www.gbhem.org/site/c.lsKSL3POLvF/b.4127839/k.A1EE/Standards\\_\\_Guidelines\\_for\\_Use\\_of\\_CEUs.htm](http://www.gbhem.org/site/c.lsKSL3POLvF/b.4127839/k.A1EE/Standards__Guidelines_for_Use_of_CEUs.htm) (accessed 20/09/09).

Heritage Collection and possible teaching resources at Wesley College, Bristol – that could exemplify mutual accountability and support?

Mindful that ministerial training is not to be treated as an autonomous subject but as an integral part of Trinitarian theology and ecclesiology, we conclude by recalling that the Church's ministry is Christ's ministry. In the ancient Liturgy of St John Chrysostom, the prayer before the Great Entrance acknowledges: 'Thou art the offerer and the offered, the acceptor and the distributed; Christ our God'. Even today, the Spirit of God constitutes the body of Christ by realizing Christ's ministry *as* the Church's ministry. Mindful of this conviction, and with our ecumenical partners, the Methodist Church is still called to exercise the ministries of Christ, to increase awareness of God's presence in the world, to celebrate God's love in services of worship, and to call all who will hear to become followers of our Lord.

## **Appendix 5: Supplemental report of Professor Jennifer Bone**

### **Review of Wesley College, Bristol, Paper 2<sup>166</sup>**

This paper amplifies an initial earlier note and should be read in conjunction with it. It remains a personal ‘vision’ paper, without benefit of the logistical, financial, property and church policy considerations which the review group will have at its disposal. It is an attempt to outline how the assets of Wesley College might be renewed for the benefit of the Christian community, through a brief exploration of:

- a) national need
- b) Wesley’s assets and potential
- c) a note on implementation

### **South and South-West Regional Training Network.**

The Review Group’s terms of reference relate to the College’s future as the core institution of a regional training network. As my initial paper indicated, it seems highly improbable that Wesley can have a secure long term future in this capacity alone. Within a short time it would be facing further review, the last in a succession of such assessments, which have put a considerable strain on Wesley’s ability to plan, or to have its plans taken seriously by outside bodies and potential partners.

What follows does not preclude the intended RTN role, but it would set it in a much larger operation, and should considerably enhance it.

### **The case in summary:**

1. In the contemporary educational, cultural, social and policy environment in the UK, the Churches will need to give increasing attention to nourishing faith-based theological education, at a level and in a manner commensurate with the norms and standards of higher and further education.
2. The staff of our theological colleges have worked tirelessly and magnificently in recent years to cope with uncertainty and implement change, to achieve results with diminishing resource, to incorporate skills’ training in ministry, in accordance with Methodism’s in-house agenda. There has been much attention to nurturing the strength and identity of Methodism.
3. At the same time, ‘the people of God’ find themselves living in a world in which their faith, belief and all that flow from them are increasingly under question and too readily assumed to lack intellectual credibility, on the assumption that their faith has not been subject to rigorous

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<sup>166</sup> Paper 1 is not reproduced but is referred to at paragraphs 6.19 to 6.23 above.

inquiry nor has met the demands of impartial analysis. There is an urgent need for the Churches to give as much weight to the needs of lay people in this respect as to those in ministry.

4. This is essentially a matter of providing appropriate educational opportunity. Universities and colleges today are well versed in this type of 'short course' provision for both specialists in a field and for the wider community in a way which enables them to keep pace with a fast changing knowledge environment. It can be done.
5. The proposal embodied in this paper is that the circumstances of Wesley College now offer the potential for the Church to address this need. It could only be done by an institution with the university links to keep its feet on the academic ground, as it were; to be practicable its work would need to be offered nationally, and to all churches, and indeed it would necessarily become involved in international links. The Methodist Church would need to trust it educationally, and guarantee it sufficient operational freedom. On the first of these, the Church has a proud record.
6. This is not primarily a matter of seeking to sustain public influence (although, arguably, only the laity operating within their various spheres can now do this). It is primarily a matter of using the Church's resources to offer lay people depth in understanding of their faith and of the educational riches which have been, and continue to be, brought to bear upon it.

### **Contextual factors: national**

#### **Theological education within higher education**

Historically, the Christian churches have linked the theological training of their respective ministries to the work of university theological faculties, which in turn have been dominated by the fields of Biblical studies, the development of doctrine, church history, and the implications for Christian thought of the work of related disciplines. This was possible, not because theology was in any way exempt from the established canons of academic practice – indeed the reverse is true – but because the faculties themselves were predominantly staffed by those who started from a Christian premise. This is no longer the case; there has been substantial change as recently as the past decade.

In an article published in *Theology* (May/June 2008) Leslie Houlden (Professor Emeritus of Theology, King's College, London) reported that his 1999 survey into the type and number of posts showed 70 in New Testament Studies, 50 or so in doctrine, 20 in each of the main periods of church history; 'a paltry 3 in ethics'. He also pointed out that this situation no longer pertains.

Outside a limited number of university faculties with historic church links, the focus is on wide-ranging religious studies, offering eclectic scope, sometimes to the point of incoherence. Take up is

good, and Religious Studies has maintained its position as a subject attracting increasing numbers at A level. This is welcome; but it is far removed from 'faith-based theology', or at least an approach to theology which works rigorously through the implications of faith and practice.

The continuation of theological and religious studies within higher and further education is not guaranteed. The government has recently made clear that there will be a reduction in university resources, and that its priority is to safeguard the scientific, technological and wealth-creating sectors within universities. 'Arts' subjects will find themselves in competitive cut and thrust, and Religious Studies departments are for the most part among the smaller players.

Such a reduction may not happen overnight, but the Church should be alert to trends, and be prepared to bear increasing responsibility for the theological education of the laity as well as the ministry, laity whose expectations will be derived, at least in part, from their other experience of high level study in other fields, not least those who have already encountered religious studies academically.

**The demise of knowledge of Christianity within contemporary culture:** The point does not need labouring but it perhaps bears repeating that the rapid disappearance of the most common and basic features of a Christian education has taken many by surprise. (My own informal investigation during the past few years into the common understanding of the Christmas story confirmed for me how slight it is, accompanied by genuine puzzlement as to why the origins of the festival should now be considered of any importance.) Those who teach literature and history for A levels or within higher education confirm the dearth of even the most basic biblical knowledge teaching. The Church is now very nearly in virgin territory, even at graduate level, and it is there already in large swathes of our community.

**The diminishing public regard for the Christian contribution to society:** As Rowan Williams put it when asked recently about the Church's participation in public debate: *"The foot is still in the door, even if it is being squashed very painfully"* (*Church Times* 11/9/09). In part the position is exacerbated by the current norms of media presentation – the insistence on (over-) simplification, the preference for sound bites, inadequate regard for accuracy in reporting, the handling of discussion of vital ethical issues. The fact that it is not easy to share the depth and nuances of Christian understanding and approaches makes it all the more essential for the Church to take seriously this element of its mission; in particular, enabling its lay membership to participate at an informed level within the context of their own areas of work or influence should surely be regarded as of front-line importance.

**A growth in hostility?** A recent factor is the increasingly confident note of scepticism or indeed outright hostility, which is now pervasive within our culture and is personified by the work of such writers as Richard Dawkins, Christopher Hitchens and Philip Pullman (forthcoming book *The Good Man Jesus and the Scoundrel Christ*). The advocacy of atheism has gained vast ground in public consciousness, reflected in the public domain in a variety of ways, and to a degree now influencing policy. It will not be met by the simple re-iteration that we have the truth, nor by the presumption that hostility to religion is a consequence of the presence of Islam. Scepticism purports to be evidence based, but what is interesting is the caricature of the religion which is being shot down in flames, ‘rejection of religion on the cheap’ as Terry Eagleton has put it (*Reason, Faith and Revolution: Reflections on the God debate* 2009). It is possible only because the public understanding of Christian faith is so limited. It is not easy to combat, but there is an urgent need for the churches to promote lay theological education at a level which can engage effectively in the debate and not vacate the public field to misrepresentation, while our focus is on in-house pre-occupations.

### **Wesley College: the opportunity**

Wesley has a number of strengths which suggest that it would be worthwhile to explore its capacity to fulfil a national role as a centre for such theological education.

- a) **the quality of the Library:** Wesley’s Library has been carefully nurtured over a number of decades and must now be one of the best theological libraries in the country, not least because with single print runs of key books, it is almost impossible for libraries to make up ground lost during periods of retrenchment in purchasing. Times of constraint have adversely affected many university libraries at intervals, and Wesley’s strength in depth is rare. It has important specialist collections, and it houses extremely valuable Methodist archive material which is made available to researchers in a most helpful and expert manner. It would be a tragedy if this was lost to a less accessible environment.
- b) **Conference capacity:** in the last few years, the College has demonstrated its capacity to promote successful Conference activity and earn from it. Its facilities are not perfect in this respect, but they have strengths in terms both of location, accessibility, and a pleasant environment. There is also real potential on site for further adaptation, as and when possible. A centre for lay education would be heavily dependent upon a flexible conference programme, which would need to draw its clientele widely, and not just from within Methodist circles. [In the course of time it should also aim to be at the cutting edge of contemporary forms of educational communication, utilising the internet and media projection.] It seems very doubtful that the College on its present site could be fully utilised for RTN purposes, and in so far as

generating income is fundamental to its future, it makes sense to generate it for the purposes of the church in the broadest terms.

- c) **ecumenical links:** although the prospects for co-operation with Trinity College are poor to the point of non-existent, this should not be confused with the absence of potential ecumenical partners. Wesley's most fruitful co-operation in the immediate past has been with the Roman Catholic diocese, and there is good reason to suppose that the Diocese would co-operate with the venture outlined here. I am not in a position to comment on the potential for co-operation with the Baptist College, but there are signs of hope for joint activity with the Anglicans, especially the Diocese of Bath and Wells, and it should not be supposed that the Bristol diocese as a whole buys into the Trinity perspective. It seems very possible that such a focus on lay education would meet with a co-operative response from other church bodies, but clearly this would need to be explored.
- d) **co-operation with Bristol's universities:** there are two aspects:
- **Bristol University** has a high reputation of long standing in theological and religious studies. Now led by Professor Gavin d'Costa, the academic respect in which he is held in the University is reflected in the award of a personal chair. Wesley's existing contact with him, as well as his own publications, offer substantial evidence of his likely support for the venture outlined here. The College has both an established validation relationship and research links. The important point is that co-operation with Bristol lends credibility to Wesley's engagement in theological education.
  - the **University of the West of England** presents a rather different opportunity. Its core strategy of highlighting student needs and promoting a student sense of well-being has taken account of current student interests. It continues to provide some opportunity for mainstream religions on campus, alongside alternatives. The University's chaplaincy arrangements now reflect this approach, one which is also being developed elsewhere. UWE is also seeking to offer opportunities for students and staff to learn more about religion if they wish, for which the University will need the help of outside bodies to supply in any depth. For Wesley, it would be an avenue worth exploring, and one for which the District would have a point of entry.
- e) **Bristol's Methodist heritage:** In British Methodist history, Bristol is second only to Oxford (and many would argue equal to, or ahead of it!); the point is the potential for generating research and conference interest internationally. To be viable, Wesley would need as many

strings to its bow as possible, consistent with its main purposes, and the potential contribution of this one, properly marketed, is not negligible.

### **Some prerequisites for successful implementation**

- 1) Planning:** Ideally, if the concept is seen to be worth pursuing further, the next step should be an intensive feasibility study. Recollection of Methodist processes suggests that this may be difficult to accommodate.

An alternative is for there to be a defined planning phase, at the end of which it would remain possible to conclude that there is insufficient basis to proceed. However, this should be on the assumption that such a decision would arise intrinsically from the planning group's *own* assessment and recommendations, and not end up as a further opportunity for the Church to express its mind *ab initio*. The latter would simply mean elongated uncertainty.

A planning task on this scale could not be undertaken within Wesley's existing resources. It would need specialist input, some underwriting, and it would make considerable demands on the time of those involved. Any such group would need full access to and confidence in the relevant data.

- 2) Staffing and leadership:** Wesley, with this remit, would require a sufficient academic staff base (a minimum of 5?) with appropriate expertise; it should include recent f-t experience of higher education, preferably at a level of significant responsibility. It would need staff who are able to work successfully with a larger part-time team, who carry credibility in the wider academic and ecclesiastical environment, and can make the necessary wide ranging connections. Clearly the cost of such a staffing base would need to be met in part through income generation, although it might be hard to escape the necessity of some initial 'pump-priming'. Above all it would require staff wholly convinced of the importance of the task, committed to, and energised by the challenge.
- 3) Finance:** expert financial planning would be of paramount importance. The Church would need to be explicit about its contribution and for how long a period of time in the first instance. A business plan would be necessary, providing a firm framework and specified targets for income generation. There may also be some potential for money from trusts, for work at a high level; for this, the absolute prerequisite would be an assurance of the Church's contribution and long term commitment.

**4) Governance:** there would be a need for:

- a) a reconstituted College Council, with a composition and terms of reference commensurate with the College's new character. The extent of the Council's powers of decision making without reference to the Church centrally would also be crucial.
- b) consideration of the value of a wider consultative network with an advisory role. This need not meet often; for example, it could be consulted via e-mail, or small groups of members drawn upon for specific issues. It could also serve as extended 'friends of Wesley', a means of communicating the College's work and bringing it to the attention of as wide section of the community as possible.

**What will the Church permit?**

For such a venture to get off the ground, it would be necessary for the Methodist Church:

- a) to be persuaded that it was needed;
- b) to underwrite the College beyond the resources of the RTN role, to a limited extent, and for a specified period;
- c) to allow reasonable time for planning and implementation, before the first review.

Wesley College, Bristol, is now the only College whose future rests entirely at the discretion of the Methodist Church, and this review presents an opportunity for the Church to undertake an exciting, if risk-taking, venture.

Jennifer Bone

Pro Vice-Chancellor Emeritus,

University of the West of England

1986-1999: Member of the Directorate and from 1993 Pro Vice-Chancellor of the University of the West of England,

1998-2000: Chair of the Council of Validating Universities

1998-2002: Chair of Council, Filton College of Further Education, Bristol

1997-1998: President, Bristol Theological Society

2000-2006: Chair of Council, Sarum College, Salisbury

Recent publications include:

2006 *Higher Education and Human Good* ed. Jennifer Bone and Ian McNay. ISBN 0 9521521 9 3

2008 *Methodism in Action: the story of St Andrew's Filton 1958-2008*. ISBN 978-0-9555966-2-9

## Appendix 6: Building Schemes at Wesley College, Bristol, since 1999

MAJOR BUILDING SCHEMES AT WESLEY COLLEGE SINCE 1999		Classification				
Year	Programme	TOTAL	Capital	Major Programme	Refurbishment	Repairs & Renewals
		£	£	£	£	£
1999-02	Full electronic cataloguing of Library and Resource Centre stock	20,000		20,000		
2000-05	Replacement of carpets in FGH (ongoing)	19,000				19,000
2003-05	Refurbishment of study bedrooms, including redecoration, new beds	20,000			20,000	
2000	<i>Lift installation</i>	41,000	41,000			
2000	<i>New telephone system</i>	7,000	7,000			
2000	<i>CAT5 wiring providing Internet connection to all Study Bedrooms</i>	7,000	7,000			
2000	<i>Replacement of all boilers (23) in FGH</i>	30,000				30,000
2000	<i>New reception, foyer, bookshop Ground floor toilets</i>	41,500		41,500		
2000	<i>First Floor Office &amp; Tutors Studies</i>	16,000		16,000		
2000	<i>Second Floor Showers &amp; Laundry</i>	8,000		8,000		
2000	<i>Disabled access to Main Building</i>	10,000	10,000			
2002	<i>Increased car parking</i>	9,000		9,000		
2000	<i>Preliminaries, VAT &amp; Fees on above</i>	40,000	40,000			
2000	<i>Replacement of curtains in FGH</i>	4,000				4,000
2002	<i>Provision of 2 en suite study bedrooms inc new furniture</i>	19,000	19,000			
2002	Purchase of laptops and data projector for teaching use	4,000	4,000			
2002	Replacement incoming Electric Main and distribution boards	34,000		34,000		
2002	Painting Outside Main Building south & east elevations	10,000				10,000
2003	Painting Outside Main Building north & west elevations	15,500				15,500
2003	Painting Outside FGH	6,000				6,000
2003	New food counter in Dining Room providing meals and outreach to local community	4,500		4,500		
2003	Production of Prospectus & rebranding	5,000		5,000		
2004	Disabled Access to Library	4,000	4,000			
2005	Replacement dishwasher, ovens, fridges and freezers.	10,000			10,000	
2005	New fresh air and extract system to kitchen	8,000		8,000		
2006	Refurbishment of Stacey Room, including new furniture for Common Room use	2,000			2,000	

2006	Refurbishment of former Common Room as Conference Room with new equipment	4,000			4,000	
2006	Refurbishment of tutor's manse (19N) inc uPVC windows & new kitchen	30,000	*	30,000		
2007	Refurb. 17 Northover inc double glazing kitchen & bathroom	20,000		20,000		
2007	70 Northover double glazing, refit Kitchen, redecorate	14,000		14,000		
2008	70 Northover replace boiler & chimney, asbestos removal	8,000				8000
2008	67 Westover double glazing	3,600		3,600		
2008	FGH Flat 25 refit kitchen	3,200			3,200	
2009	FGH Flats 15,25,26 Refit bathrooms	8,000			8,000	
2009	FGH Flat 26 Refit kitchen	4,000			4,000	
2009	70 Northover complete double glazing	5,700			5,700	
2009	67Westover bathroom, kitchen & carpets	3,200			3,200	
2009	46a Northover Kitchen, Bath, carpets & double glazing to back	8,800			8,800	
2009	5 Yearly electrical inspection of all properties	4,500				4500
		511,500	132,000	213,600	68,900	97,000

## Appendix 7: Planning Appraisal of Lambert Smith Hampton

### **1. Introduction**

1.1 This report has been produced by Lambert Smith Hampton for The Methodist Church in response to a request for planning advice relating to the Wesley College site, Bristol.

1.2 This report presents the findings of a desk-top review of the planning policy context to the site and the outcome of a meeting with Martin Seaton, Area Planning Coordinator (North & West Area Planning Team) of Bristol City Council.

### **2. Planning History**

2.1 The planning history for the site is extensive, but the majority of applications have been for works to trees, or related to telecommunications equipment.

2.2 Consultation with Martin Seaton, Area Planning Coordinator (North & West Area Planning Team) identifies the following five key planning permissions for the site:

- Outline planning permission 1085P/81N, approved in August 1981 for: *36 flats for college students, 12 detached houses, 18 flats and extension to Didsbury Houses to provide 6 additional flats;*
- Reserved matters permission 3929P/82N, approved in December 1982 for: *reserved matters on 10 detached houses from permission 1085P/81N;*
- Full planning permission 0559/F/88x, approved in May 1988 for: *new changing room and alteration to laundry facilities;*
- Full planning permission 00325F/89x, approved in March 1989 for: *a third garage added to existing two as tool shed;*
- Full planning permission 00/00368/F, approved in March 2000 for: *change of use of one wing from residential training college (Class C2) to charity office accommodation (Class B1).*

2.3 A review of the above permissions does not highlight any restrictive conditions or evidence of a Section 52 planning obligation relating to the site. Consultation with Martin Seaton, Area Planning Coordinator (North & West Area Planning Team) confirms this.

### **3. Planning Policy Context**

3.1 This chapter presents and discusses the site's planning policy context, highlighting the policies that apply to the site and what effect they may have on future development opportunities.

3.2 Below is an extract from the adopted 1997 Bristol Local Plan which illustrates that a number of policy designations apply to the site. These are summarised under conservation and landscape protection below.

### **Conservation**

3.3 The appraisal site is a Conservation Area. All new development and additions/alterations to existing buildings must both protect and enhance the character or appearance of the Conservation Area.

3.4 All trees within a Conservation Area are protected (as well as in this case, there being the added protection of Tree Preservation Orders).

3.5 Landscapes and open spaces that are considered to contribute to the character of the site will be safeguarded from significant adverse impact.

3.6 Any development proposal would be required to analyse and respond to any special architectural features of the surrounding buildings and their details reflected in the new proposals (through an exercise called a *Character Appraisal*). In particular, the design of new buildings in Conservation Areas should consider the College site height, scale, proportion and alignment of the surrounding traditional buildings, and have regard to the existing density and patterns of development on a site.

3.7 Extensions need to respond to the architectural style of the existing and importantly should not dominate the existing building and should normally be set back from principal elevations to create distinct visual breaks.

### **Landscape Protection**

3.8 The appraisal site is the subject of a number of policies of a landscape protection nature as follows:

- The woodland, the recreation ground and all other green space on the site is protected open space.
- It is a designated site of nature conservation importance, identified as a wildlife network site. Policy seeks to ensure that development on such sites will only be permitted where it does not have a significant adverse effect, where proposals maintain an effective link in the network, or create an effective buffer to it. Proposals that maintain the integrity of the wildlife network and include measures to enhance the nature conservation value of remaining open land, will be favourably viewed.
- The site is identified as a prominent ridge landscape, which along with other green hillsides, promontories, ridges, valleys, gorges and man-made landscapes in the City, policy seeks to protect from development that would have a significant adverse effect.

## **Observations**

3.9 The important aspect of the planning policy context, is that whilst the site is subject to a number of restrictive policies, the built up area of the site is excluded from the protection of open space policy and is effectively ‘white land’ within settlement limits where subject to standard development control policies, the principle of new build and extensions to existing buildings are acceptable.

3.10 The above means that the developed part of the site carries less restriction, even though the undeveloped hinterland is a sensitive landscape.

## **4. The Local Authority’s View**

4.1 We have carried out consultation with Bristol City Council via a meeting with Martin Seaton, Area Planning Coordinator (North & West Area Planning Team) to discuss the site’s general planning context as well as seek answers to the four specific questions that we were asked to pose to the Council.

### **The Need to Retain the Football Pitch as a Grassed Area**

4.2 It was confirmed in the meeting that the football pitch (as well as the other green spaces around the site) is protected open space which planning policy seeks to preserve. Any loss of open space at the site would therefore be contra policy.

4.3 The Planning Officer was unable to confirm whether a restrictive covenant exists via a Section 52 Planning Agreement, but the land is protected in policy in any event.

### **The Principle of Replacing the Headingley Building with a Two Storey Building**

4.4 Encouragingly, the Planning Officer was favourable to the principle of replacing the Headingley Building with a taller building given that it sits within the overall developed part of the site and is not subject to the open space protection policies.

4.5 The matter of how many storeys may be acceptable will need to be informed by a *Character Appraisal* which would assess impact on views and the new building’s relationship to the main building.

4.6 It was suggested that the existing footprint of the building should be adhered to in any redevelopment.

4.7 The appropriateness and quality of the design and materials of any replacement building and its response to the need to protect or enhance the Conservation Area setting will be important considerations in determining the acceptability of a proposal.

4.8 The amenity of properties along College Park Drive was noted as a further consideration.

### **The Principle of Altering the Existing Site Entrance and/or an Additional Entrance**

4.9 The Planning Officer agreed that the entrance arrangement to the site was confusing. Subject to the detail of any alternative proposal, the principle of a reconfiguration was not dismissed, but it would naturally need to demonstrate a solution that was workable for all who currently share the access.

4.10 With respect to the creation of an additional access, the Officer was unsure how that could be accommodated. Any highway design solution would need to ensure that it did not adversely affect the setting to the Conservation Area. It would also need to ensure that it did not adversely affect the protected green space.

### **Infilling with an Extension or Stand-Alone Building**

4.11 Encouragingly, the Planning Officer confirmed that all the gaps in and around the existing buildings are within the 'white land' part of the site and the principle of infilling or developing new stand-alone buildings on this part of the site would therefore be a matter of their design and their impact on character and appearance.

4.12 Acceptability of a proposal would therefore be a consideration of scale, height, materials and relationship to the existing buildings.

## **5. Alternative Uses**

5.1 Whilst alternative uses were not explicitly a part of the brief for this report, the topic was touched upon in the meeting with the Local Planning Authority and below for added information, is the outcome of that discussion.

5.2 The Planning Officer was of the opinion that a residential, care home/retirement village or perhaps medical facility were likely to be the most favoured re-use options given the site's out of town location and the nature of the surrounding land uses.

5.3 It was acknowledged that the college currently had an ancillary office function and that would not rule out the acceptability of a scheme that had an office element to it, but a primarily office/business use was unlikely to be favourably viewed.

5.4 Retail and hotel use were likely to be ruled out on the basis that the site is sequentially out of town and would fail policy tests such as distance from city centre services when judged against other central sites.

## **6. Strategy**

6.1 The Local Planning Authority has responded positively to the principle of redeveloping the Headingley Building, to infilling on the built up part of the site with either extensions to the

existing buildings or new stand-alone ones. On the matter of a reconfigured or indeed the creation of an additional access, the Council will need to be convinced of the feasibility of doing so.

6.2 The Local Planning Authority has offered its willingness to engage in preapplication discussions, but it is known that the Church is not at the stage where it is ready to commit to the preparation of the necessary appraisals and concept design work that would be required to accompany a pre-application submission to the Local Planning Authority for a formal consultation response.

6.3 In light of the above, this chapter outlines the next steps that are considered necessary to advancing the different potential proposals at the site.

### **Character Appraisal**

6.4 Given the site's Conservation Area status as well as its numerous landscape designations, it will be important for any of the possible projects, to firstly have a Character Appraisal undertaken. This document will inform and support any building design work and highway/access feasibility work too. Primarily, it will provide understanding on the site's 'sense of place', namely what are the most sensitive/important elements of the site in terms of views into it, views out of it and to define considerations such as height/scale/massing, appearance and use of materials for any extensions or stand-alone new build.

6.5 A Character Appraisal would normally be undertaken by a conservation architect, with in this case, potential for input from a landscape architect in terms of the setting to the buildings.

### **Building Extension or New-Build Design Investigations**

6.6 To progress any building extension/stand-alone new build will involve the preparation of one or more design concepts to start the process of gaining a preapplication response from the Local Planning Authority, as well as the earlier stage processes of costing and engineering feasibility of a potential scheme.

6.7 Planning, Building Surveying, Mechanical and Electrical (M&E) engineering and Architectural design inputs will be needed at this stage in order to prepare a concept design.

6.8 There are many ways of procuring such a team, but a staged instruction may be the most appropriate, enabling a 'task and finish' approach to this initial feasibility stage with the ability to stop the process based on either potential adverse cost and/or an unfavourable pre-application response from the Local Planning Authority.

6.9 If indicative costings, planning and building surveying/M&E are favourable, the client can then instruct the next stage of work which could either be based on Royal Institute of British

Architects (RIBA) work stages or taking a scheme through to the submission of a planning application.

### **Access/Highway Design Investigations**

6.10 The feasibility of either reconfiguring the existing and/or creating an additional access to the site will require input from a specialist Highway Engineering consultancy which would test the feasibility of a range of options with the Highway Authority with the goal of arriving at an agreed solution.

6.11 These investigations would need to consider matters such as drainage of the highway, the potential for impact on the landscape and Conservation Area designations and potential residential amenity issues from new/additional highway lighting.

### **Procuring a Design Team**

6.12 Depending on what the Church may wish to do, will obviously influence the form of procurement, the nature of the team required and the cost of gaining the necessary advice.

6.13 As intimated above, 'task and finish' instructions are a helpful way of taking a staged approach to a proposal, enabling work area and costs to be easily defined.

6.14 In a situation like this, where there are potentially multiple projects, there can be economies of bringing projects together to create an estate-wide/masterplanned approach to them. Instead of procuring projects on an ad-hoc, project by project basis, projects are brought together, but can still be broken down into a number of independent milestones such as design concept and costing; pre-application; detailed design and costing and then submission for planning.

6.15 Bringing projects together as a larger scheme, provides the ability to gain economy. One example of this, would be to instruct the Character Appraisal at the same time/to the same Architect that is awarded the design work for an extension/new build proposal. You are likely to get better value this way than instructing them separately, even if the same Architect ends up securing both commissions but some months/years apart. The ability to win a larger single instruction is likely to bring the cost down over separate commissions.

6.16 A second example where cost could be saved, is through the procurement of services from a multi-disciplinary consultancy team which can offer several benefits not available when appointing ad-hoc advisors. This would apply for instance to the matter of a revised and/or additional access, where there is likely to be the need for input from a Highways Engineer, a Drainage Engineer and a Conservation/Landscape Architect. Procuring such a scheme through a multidisciplinary consultancy which has all the necessary functions in-house would be likely to bring better economy, but often an easier process from a project management perspective (with

one project manager on behalf of the client liaising with one project manager on behalf of the consultant).

6.17 To start the process of procuring an advisory team, there are two ways forward:

1. Canvassing a number of suitable consultancies that we have worked with over many years on projects similar to those considered in this report to find out ballpark costs for taking the proposals forward to for example pre-application concept stage.
2. Preparation of a formal brief for one or more of the project areas for issue to a shortlist of say five consultancies. The brief would contextualise the proposed need for consultancy services by outlining the potential scope of work, it would set agreed milestones, agreed deliverables and the basis on which the consultant should quote such as fixed total cost, agreed fee ceilings, RIBA work stages or percentage rate of scheme value.

### **Further Investigations into Alternative Uses**

6.18 This report has only touched on the matter of the re-use/redevelopment of the site for other uses. The Church may wish, either alongside, or as an alternative approach to the progression of design work for its own use, to further investigate the feasibility and market interest in releasing the site and buildings for other uses.

## **7. Comment & Conclusion**

7.1 The planning policy review of the site highlights a number of restrictive designations on the site of a landscape and conservation nature.

7.2 Our review of the five most relevant planning permissions for the site has not highlighted any restrictive conditions or evidence of any planning obligations/restrictive planning covenants on the land.

7.3 Our discussions with Martin Seaton, Area Planning Coordinator (North & West Area Planning Team) of Bristol City Council (whilst being pre-application and therefore without prejudice) highlight that the Council would be likely to favourably view proposals for infilling and new build on the already developed part of the site as well as a scheme that replaced the Headingley Building with a taller structure. The acceptability of any proposal would be down to its appearance, relationship to the existing and its impact on the character/appearance of the Conservation Area and sensitive landscape setting.

7.4 The site's green spaces are all protected in policy and any proposal to develop a building outside of the existing built up part would be contra to the Development Plan. Any other proposal that resulted in the loss of green space, for example a new road corridor, (in addition to

matters such as its visual impact) would be assessed on whether its need outweighed the loss of the protected open space.

7.5 Our investigations have touched on the matter of alternative uses and the Council has indicated that it would favourably consider the principle of a residential re-use (including care home/retirement village) and that an ancillary office/business component may also be appropriate.

## Appendix 8: Property Appraisal of Mr John Lee

### **INTRODUCTION**

This report addresses the following issues concerning the College buildings and grounds:

- The current condition of the buildings on the site
- The appropriateness of the accommodation for existing and proposed use
- The estimated costs of repair and improvement work
- The costs of replacement of some of the buildings
- The potential for development
- The potential for sale and the costs of building close-down

The condition of the Principal's House and the other ancillary properties owned by the College have not been examined as they are considered peripheral to the future of the College.

### **SOURCES**

Sources employed in the preparation of this report are as follows:

- A visit to the College on 15 August 2009 with some members of the Review Group during which the buildings and site were viewed.
- Floor plans of each of the buildings provided by the college
- A schedule of accommodation and floor areas provided by the college
- The valuation dated 5 June prepared by Lambert Smith Hampton
- The Planning Appraisal (Initial Findings) dated August 2009 prepared by Lambert Smith Hampton.
- Methodist Property Quinquennial Inspection Reports dated 27 April 2009 and 4 May 2009 prepared by Palmer Snell Fulfords
- The Fire Risk Assessment for the College dated 19 December 2008 prepared by Aegis Services

It should be noted that a detailed survey of the buildings has not been carried out and that the conclusions and costs are based on the above sources. Should any of the recommendations of the Review Group be pursued then details and extensive survey work will be required to accurately assess the condition of the ground and buildings and the associated costs of repair, refurbishment or redevelopment.

## **THE SITE**

The site is in a Conservation Area and I concur with the findings set out in the Planning Appraisal prepared by Lambert Smith Hampton:

- The main College Building will have to be retained
- The trees are protected
- The recreation ground is protected
- The built up area of the site could be developed further with new buildings and/or extensions to the existing
- Subject to compliance with the relevant planning policies and the quality of the proposed design it is possible that the Headingley Building could be redeveloped as a two storey building

It should be recognised that the approval of a planning application in a Conservation Area such as this is especially difficult, expensive and time consuming. In my experience a planning application of any substance would take a minimum period of 18 months to prepare and obtain and a more realistic expectation is that it will take between 24 and 36 months.

## **MAIN BUILDING**

The main building was built in 1953 in a style and construction typical of many institutional buildings of the time. The fabric and structure appear sound. The building provides residential accommodation in the form of study bedrooms, offices, conference rooms, a library, an archive store, dining and reception facilities. Part of the building is currently leased as offices.

The Quinquennial Report lists a number of essential minor repair and maintenance requirements over the next five years with a total estimated cost of less than £20k. These repairs include work to replace spalled and friable roof tiles to the main roof. The expected life of a tiled roof is normally 60 years and the age of the building is now approaching this indicating the like need for re-roofing within the next 5-10 years.

Some upgrading of the building has taken place. For example a lift was installed and disabled access provided during 2000. The building has however suffered from the lack of adequate maintenance and investment over many years.

There are a number of significant issues which need to be addressed:

- The building is poorly insulated and none of the windows are double glazed
- The heating boilers are in urgent need of replacement and the heating system is likely to have come to the end of its life
- The lighting throughout the building is in need of replacement
- The fire alarm should be upgraded to a full L1 system
- None of the residential accommodation (apart from two study bedrooms) has en suite facilities
- The main rooms – conference rooms, dining room etc – are utilitarian and dated
- The Library, the converted original Chapel, is totally inappropriate for its use and in very poor decorative order. Much of the structure inserted to provide the storage for the books does not comply with current Building Regulations. The large uninsulated windows give rise to unacceptable solar gain in summer and heat loss in winter. Given the historic significance of some of the books and documents stored in the library this is a matter of considerable concern.
- The Archive store is similarly inappropriate with limited environmental control and inadequate space for safe display and access.
- The decoration and floor coverings are in need of upgrading throughout most of the building.

The floor area of this building is approximately 2600m<sup>2</sup> (28000sq ft) and full refurbishment is likely to be in the range £800 -1000/m<sup>2</sup>. The total building cost of this work is therefore estimated to be in the range £2m - £2.6m (excl VAT and Fees). It is significant to note that new building is zero VAT rated but work to existing buildings attracts VAT at the full rate (currently 15% but increasing to 17.5% from Jan 2010).

Total costs are estimated to be in the range as follows:

Building work	£2,000 - £2,600k
Fees at 14%	£280 - £364k
VAT @ 17.5%	<u>£399 - £519k</u>
Total	£2,679 - £3,483k

Note: these costs include floor coverings but exclude loose equipment, furnishings and soft furnishings.

One of the essential aspects of any refurbishment would be the provision of en suites in all study bedrooms. Two study bedrooms have already been upgraded in this way but the resulting rooms are small. The floor area of the existing study bedrooms is approximately 11m. Accepted minimum standards in medium range hotel accommodation are 10 m<sup>2</sup> (net) for a single room and 17 m<sup>2</sup> (net) for a twin room. The provision of an en suite with a shower would require a further 2.5m<sup>2</sup> resulting in gross floor areas of 13.5m<sup>2</sup> (single) and 20.5m<sup>2</sup> (twin). Achieving this standard would clearly result in a reduction in the number of rooms. The inclusion of this re-configuration will generate costs at the top of the range indicated above.

A refurbishment of the existing building will provide the opportunity to review and rationalise the use of the building. At present some functions under-utilise the space available and others have a deficit of space. If this course is followed it is essential that a full and detailed operational brief is established prior to any reconfiguration of the building. Dependent on this brief, it could be possible to provide all of the required facilities within this building, even if a limited extension or extensions were required, without the redevelopment of the Headingley Building referred to below.

## **THE HEADINGLEY BUILDING**

The Headingley Building provides a Chapel and tutorial rooms. It was built in 1968 and exhibits many of the disadvantages of institutional buildings constructed in the late 60's. This is a single storey building with a high-maintenance flat roof, inadequate insulation, poor external detailing and inadequate natural light and ventilation. The internal wall finishes are largely dark fair-faced brickwork which does little to enhance the quality of the interior. The layout and presence of demountable partitions to the tutorial rooms render the building far less flexible than it was conceived to be. In addition the tutorial rooms are at a different level to the main floor thus inhibiting access.

It is difficult to see how this building has a sustainable future and I suggest that it has an economic and operational life of no more than five years, not least because it has tutorial rooms which are not accessible by wheelchair. The roof will require major expenditure within the next five years. The cost of any refurbishment and improvement work would all be subject to VAT @ 17.5%.

It has been suggested that this building could be replaced with a building of two storeys with a similar footprint which could include a chapel, tutorial rooms and staff offices. The floor area of the current building is approximately 465 m<sup>2</sup> (5000sq ft). The build cost of a new building of 1000 m<sup>2</sup> would be approximately £2000/ m<sup>2</sup> and total costs would be as follows:

Construction	£2000k
Fees @ 14%	£280k
VAT @ 17.5%	<del>£49k</del>
	£2329k

The alternative would be for the building to be demolished and the site landscaped. Demolition costs are notoriously difficult to estimate as they are dependent upon material recycling values but I would not expect them to exceed £50k.

### **FRANCES GREEVES HOUSE**

Frances Greeves House was constructed in 1985 and is a relatively modern residential building in good condition. With careful planned maintenance this building should continue to provide an acceptable standard of accommodation for the next 20 years.

The building will however require some significant expenditure over the next 5 years. Some of the kitchens have been replaced and the remaining need to be replaced shortly. None of the windows are double-glazed and these should be upgraded when resources are available. Towards the end of the 5 year period consideration should be given to upgrading the bathrooms.

### **VALUE, SALE, OTHER USES AND RUN-DOWN COSTS**

Lambert Smith Hampton's valuation advice (5 June 2009) para 5 suggests other uses for the site with which I concur. The difficulty with the conversion and refurbishment of the Main Building is that the costs for a developer begin to approach those of a new building because of the affect of the VAT regulations and this will in turn impact upon the value of the site. This impact is further exacerbated by the current financial and property market and I would reinforce Lambert Smith Hampton's advice (para 2) that if it was decided to dispose of the site, now is not the time to do so.

There are essentially two routes which can be followed should the decision be made to dispose of the site. The first would be for planning permission for a change of use to be obtained by the Church/College prior to marketing. This would provide prospective purchasers with some assurance at the time they make their offer and is therefore likely to enhance the value. Alternatively, if no permission is in place, prospective offers are likely to be on a “subject to planning” basis such that completion of the sale could not take place until a satisfactory permission was in place. Clearly in the first case the Church puts resources at risk in the expectation of a achieving a higher value and in the second the developer places resources at risk.

I cite these routes because in both cases the sale is delayed by the planning process and, in view of my earlier comments about the time involved in that process, the realisation of the asset can take considerable time. During this time the Church/College will remain responsible for the preservation of the asset.

Estimated Run Down Costs – Year 1: £

The Headingley Building

Decommissioning/drain down	7,000
Boarding Up	5,000
Insurance	1,000

Main Building

Maintenance	20,000
Security	40,000
Boarding up	25,000
Energy	25,000
Insurance	3,500
Rates	7,000

Frances Greeves Court

Assume lets continue	0
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Grounds

Maintenance	<u>30,000</u>
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Sub-Total	163,500
Management Costs	<u>16,500</u>
Total	180,000

It is reasonable to assume that these costs will be sustained or exceeded in subsequent years until the sale was completed. These do not take account of anything other than building-related costs and other costs will depend upon operational decisions eg the storage or transfer of the library and archives elsewhere, the disposal of furniture and other loose assets.

It has been assumed that the flats in Frances Greeves Court will continue to be let on a six month shorthold tenancy and that income will cover any costs.

## **CONCLUSIONS**

The current condition of the buildings on the site varies. The Headingley Building does not have a sustainable future, the Main Building could be refurbished and reconfigured to provide good quality college and conference facilities and Francis Greeves Court has a sustainable future subject to continuing good management and investment.

The estimated costs of the options are set out above but are subject to detailed survey and investigation.

The potential for development on the site is limited by the Conservation and Planning Policies to the area of existing development.

The costs of disposal of the College site are considerable and the timescale will be significant.

John Lee BA, DipArch, RIBA  
Chartered Architect  
Estates Manager, Methodist Homes  
August 2009

## Appendix 9: Informal valuation of Lambert Smith Hampton, 5<sup>th</sup> June 2009

Dear Siôn,

Wesley College, Bristol

Thank you for providing us with the opportunity to meet with you and your colleagues on 27th May and to discuss the aims and objectives of the Methodist Church with regard to your review of Wesley College. We understand that your primary objective is to ensure the sustainability of the college, and our report addresses the issues set out in the brief provided.

For ease of clarity, each issue in your brief has been addressed in the same format provided:

1:

From the information provided we believe the approximate current open market value of the land and buildings on a vacant possession basis is as follows:

Main Building (28,000 sq ft)	£3,360,000
Headingley Building (5,000 sq ft)	.. £600,000
Frances Greeves Court (19,000 sq ft)	£2,280,000
Houses x 3 (£500,000 per unit)	£1 500,000
Flat t Maisonette x 2 (£200,000 per unit)	<u>£400,000</u>
	£8,140,000 <sup>167</sup>

We would however stress that this is not a formal valuation. More time and detailed work would ideally be required particularly in respect of planning and potential demand. Also we would highlight that property finance remains scarce and those with funds available are seeking bargains.

2:

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<sup>167</sup> See footnote 71 above for full details of the houses and maisonettes. See footnote 122 above for an explanation of the error in the LSH report as to the number of houses.

We do not recommend a sale of the premises in the current market if you can avoid doing so. Although there are potential purchasers in the market who do have the ability to raise funds for acquisitions, they will be looking to achieve a purchase price well below values that you could potentially realise when the market improves.

We suggest that, once a strategy has been agreed, the most appropriate action would be to follow the necessary planning route which would run its course whilst the market hopefully improves.

3:

Disposing of various parts of the College site is certainly feasible. However, splitting the site into different ownerships may create issues. Limited access to the site will be unfavourable if under multiple ownership. Furthermore, problems arising through the management of the site may result in compromises being made that may reduce the attractiveness of this option.

The sale of off-site residential buildings would not create any of these issues.

4:

Altering the configuration of the site through demolishing any existing buildings and / or erecting new buildings may be subject to planning constraints. For example, intensifying the use of the site through the erection of additional buildings could potentially be deemed inappropriate by the planning authority. Again, access to the site will be a major consideration.

Tree Preservation Orders would clearly restrict the development on certain areas of the site and consequently restrict the net useable area available for development. The Local Planning Authority has the power to vary and revoke TPOs so we would need to make further investigations in order to establish the trees to which the orders apply. Furthermore, the TPOs may have been made before the implementation of important changes to the regulations. For example, TPOs made and confirmed before 1975 prohibited the cutting down, topping, lopping or wilful destruction of trees. They did not prohibit the 'uprooting' or 'wilful damage' of trees because these acts were not included in the Model Order until March 1975.

You may be aware that planning obligations are contained within Section 106 of the Town and Country Planning Act 1990, which allows landowners to enter into obligations either unilaterally or by agreement with a local planning authority. Section 52 Agreements, which we discussed briefly in our meeting, refer to obligations made prior to the 1990 Act and you advised that the playing fields may be affected by such an obligation. The provisions are similar but not identical to Section 106, and any agreements entered into under S.52 continue to be enforceable today. A planning obligation may be modified or discharged at any time by agreement with the Local Planning Authority and we would need to make further investigations to establish if an obligation was enforced in 1974.

5:

We believe that the site has limited potential for commercial (ie. non residential or public uses) development. The lack of profile reduces the appeal for leisure uses such as hotels or health clubs. The demand for a large scale new office scheme on this site would also be negligible. However, alternative uses such as a retirement village, care home or hospital would certainly be a consideration from many developers specialising in these areas and we would explore this in the first instance. We believe that the setting and the sites proximity to affluent suburbs and road network make this site very suitable for such uses.

Residential development would also be suitable, again for the aforementioned reasons.

6:

A sale and leaseback of your premises could be an effective way to release equity from your premises. It will give you the opportunity to obtain a significant amount of money which can be used to sustain the operations of the college without the need to move to an alternative site. We believe that a rental value in the region of £10 - £12 per sq ft would be appropriate in such a circumstance.

At this level the rent commitment would be £520-£620,000 per annum. You will be expected to contract for a lease of between 10-20 years ideally and on this basis and assuming the credit worthiness of the Church is sound then a sale should realise circa £8 Million. Please be aware that you are able to vary terms but there will be an affect on value.

7:

If the Church were to vacate the premises and retain the site then this would certainly present the option of letting the buildings to either a single tenant or a number of tenants. However, the appeal of the existing space to office occupiers would be limited and would most likely come from the Public Sector or an educational body.

In the current market the issue of timescales would be most prevalent and finding occupier(s) for the entire site could be a protracted and lengthy process. Furthermore, the management of the site with 3'd party occupants would raise additional issues that might reduce the appeal.

Rental values for office occupiers would be in the region of £10 - £12 per sq ft, but this would depend on a number of factors, for instance additional works may be required to the building in order to bring to an appropriate specification for modern office occupiers or to sub-divide the accommodation.

8:

You are clearly aware that the current economic downturn will have had a negative effect on many of the property related options that you are considering. Broadly speaking, if we had been addressing your options at the height of the market, our values would be in the region of 20-30% higher. However, on a slightly positive note our experience is that the rate of decline in market values has certainly slowed down, albeit we are yet to see any rise. Encouragingly there are signs of increased activity and we expect this to increase as finance, at both a personal and corporate level, becomes easier to obtain.

9:

In order to establish the full potential of the site we would recommend undertaking more detailed planning investigations and also market research into potential uses.

As a business we are one of the largest property consultancies in the UK and we are able to provide a full range of property services and advice. If you would like more detailed information then please let us know.

Should a decision be made to relocate to an alternative site, Lambert Smith Hampton would be very pleased to act on your behalf in advising you on an acquisition. Due to the specific criteria that a new site would have to fulfil in order to meet the College's requirements, we are unaware of any existing sites at this stage. However, the University of The West of England has recently purchased a 70 acre site adjacent to their existing campus in north Bristol. This site has the capacity for in excess of 1,000,000 sq ft of development and this may present an opportunity that you would like us to investigate further in the first instance as it does offer the potential to combine residential, educational and religious uses.

You have asked us to provide details of our Terms of Business which are attached. As discussed with you we are pleased to provide the advice to date for free as a gesture of goodwill. Should matters progress and you ask us to formally act on your behalf we would seek fees for additional work. If a formal valuation is required we would quote a fee of £5,000 plus VAT and disbursements. For a sale and/or acquisition of new premises we would quote a fee of 1% of the freehold price achieved/paid plus VAT and agreed disbursements. This fee would be on a success basis only.

We would also envisage that a planning consultant is utilised. We do have this capability within Lambert Smith Hampton and for an initial appraisal, including site inspection, meeting with the Planning Authority and research into Local Planning Policy we would charge a fee of £1,500 plus VAT and agreed disbursements.

We trust that the contents of this report are clear and look forward to your thoughts at your earliest convenience. If you would like any further information in the first instance then please do not hesitate to contact us.

Yours sincerely

Matthew Moody  
Director

## Appendix 10: Financial Impact Assessment of Options Considered

**Warning:** Assessing the financial impact of proposals is an art rather than a science and is dependent upon the availability of data and assumptions used. The assessments which follow should therefore be regarded as indicative rather than absolute.

### **Sources & Methodology**

For the underpinning sources and methodology used in the preparation of this appendix see paragraphs 6.3 and 6.4 of the report. Paragraph 6.13 records the actual accounts made available.

### **Options 1 and 2: relocation of the College to an alternative site**

This assessment – which indicates that the operational deficit is increased by £270,000 pa – is based upon a marginal cost analysis of the College’s budget for the year 2009-10. The basic assumption is that the College, library and Heritage Collection, are all removed lock, stock and barrel to another location, broadly occupying the same space in a newer, more fuel-efficient building; that the Henbury Hill complex and investment properties are sold and that WCC Ltd ceases to trade. The prime cost consequence of this is that rental income of £230,000 pa (54% of the anticipated total for the year 2009-10<sup>168</sup>) is lost and a new rental cost of circa £172,500 is incurred. (For the purposes of comparison, it has been assumed that the best site for relocation would be close to transport connections and to the University of Bristol, and for this reason a premium of £3 per square foot has been added to the LSH assumption that the rental value of Wesley College is £12 per square foot. This premium may not be payable in a location distant from Bristol in which case the operational loss would be circa £236,000 pa.) Some other costs vary through anticipated efficiencies, cessation of need or provision of service, or because they are currently borne by WCC Ltd and would revert to the college.

#### *Factual base of this costing:*

<i>Specific sources</i>	<i>College budget 2009-10</i>
<i>Methodology</i>	<i>Identification and exclusion of costs specific to Henbury Hill.</i>
<i>Contributors</i>	<i>Richard Lindsey</i>
<i>Reviewer(s)</i>	<i>David Tucker and Review Group</i>

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<sup>168</sup> In 2005-06 rental income was 39% of the college’s total income.

The costs which would be incurred as a result of WCC Ltd ceasing to trade (e.g. redundancy costs of 19 staff) are not included in this comparison.

Comparative Costs of the College Located at Henbury Hill and Elsewhere in the City of Bristol					
	Budget for Wesley College at Henbury Hill for 2009-10		Budget for Wesley College in the City of Bristol		Variation (Minus sign indicates loss of income or increased cost)
	£	£	£	£	
Income					
Fees					
MCF		13,446		13,446	0
Self-funding		39,600		39,600	0
Baptist					
Grants		137,000		137,000	0
Rents					
Students		15,600			-15,600
WCC Ltd		25,000			-25,000
Other		186,348			-186,348
Sales		3,000			-3,000
Donations		1,000		1,000	0
Interest		1,500		1,500	0
<b>Total Income</b>		<b>422,494</b>		<b>192,546</b>	<b>-229,948</b>

Expenditure	Budget for Wesley College at Henbury Hill for 2009-10		Budget for Wesley College in the City of Bristol		Variation (Minus sign indicates loss of income or increased cost)
	£	£	£	£	£
Staff					
Salaries/Stipends	229,973		209,734		20,239
Casual/Agency	8,000		8,000		0
Manses	23,072		23,072		0
Recruitment	800		800		0
Other	5,050		3,050		2,000
		266,895		244,656	
Property					
Rent			172,500		-172,500
Rates & Water Rates	21,699		9,202		12,497
Insurance	10,070		4,479		5,591
Gas/Electric	46,275		22,000		24,275
Repairs	44,090				44,090
Grounds	11,000				11,000
Cleaning	2,550		6,125		-3,575
Security	2,500				2,500
		138,184		214,306	
Operations					
Purchases	2,500				2,500
Catering	4,900				4,900
Validation	23,004		23,004		0
Ext. Tuition	3,300		3,300		0
Publicity	3,000		3,000		0
Library & Resources	11,600		11,600		0
Student Expenses	6,200		6,200		0
Computers etc					
Other					
		54,504		47,104	
Office					
Printing & Stationery	3,750		3,750		0
Postage	1,500		1,000		500
Telephone	4,000		2,000		2,000
Equipment	10,850		10,850		0
		20,100		17,600	
Other					
Interest to Bristol District					
Hospitality	1,200		1,200		0
Bank Charges	1,000		1,000		0
Professional Fees	4,100		500		3,600
Committee Travel	250		250		0
		6,550		2,950	
<b>Total Expenditure</b>		<b>486,233</b>		<b>526,616</b>	<b>-40,383</b>
<b>Deficit for year</b>		<b>63,739</b>		<b>334,070</b>	<b>-270,331</b>

### Option 1(a): relocation of only the “core institution” to an alternative site

An assessment has also been made of the costs of a ‘core institution’ – commencing operation on 1 September 2010 – comprising two tutors, up to ten part-time tutors, and a part-time clerk, and in a minimal city-centre office (6,600 square feet<sup>169</sup>) but offering a similar range of courses for the whole people of God as those currently provided by the College. Broadly, the assumed core funding would meet the cost of stipends and the cost of manses, but fee income does not cover the remaining costs. Indeed, a ‘core institution’ would only break even if its rent did not exceed £30,000 pa, the cost of circa 2000 sq. ft.<sup>170</sup>

	£	£
INCOME		154946
MCF	13,446	
Other	39,600	53,046
Connexional Grant		93,000
		<u>146,046</u>
EXPENDITURE		
Pay		
Principal	30000	
Tutor	29000	
Part-time tutors	5000	
Clerk	15000	79000
Manse		3000
Utilities		15000
Validation		23000
Office costs		5000
Accommodation		97500
		<u>222500</u>
Deficit		<u>67554</u>

*Factual base of this costing:*

*Specific sources*                      *College budget 2009-10*

*Methodology*                              *Identification and exclusion of costs specific to Henbury Hill.*

*Contributors*                              *Richard Lindsey*

*Reviewer(s)*                              *David Tucker and Review Group*

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<sup>169</sup> There would need to be accommodation for two full-time tutors, part-time tutors, the administrator and administrative paraphernalia, some sort of common room and a lecture room

<sup>170</sup> This is about the same floor area as a detached house with four bedrooms plus a double garage.

### Option 7: That full-time ministerial students should be trained at Wesley College

Had the Conference adopted a placement policy different from the one actually adopted in 2007, an 'Impact Assessment' reveals the potential for significant savings in Connexional training costs and for a transformation in the operating results of Wesley College. *That is not to say that this is what the Review advocates, but is merely to show how present costs (and issues) are driven by current policies and how the results would have been quite different if different placement policies had been pursued.* At summary level, costs might have been:

Table 1

Impact on Connexional Budget	Total Cost	Simple Average Cost per Student	Weighted Average Cost per Student
	£	£	£
Current policy	1,469,613	14,131	17,392
Alternative 1	1,426,613	13,717	16,883
Alternative 2	1,047,643	10,073	12,398
Alternative 3	975,393	8,632	10,959

Table 2

Impact on Wesley College	Fee Income and Connexional Grant	Simple Average Cost per Student	Weighted Average Cost per Student	Annual Deficit (-) / Surplus
	£	£	£	£
Current policy	152687	38171.75	50895.67	-47500
Alternative 1	229723	6961.303	8204.393	29536
Alternative 2	229723	6961.303	8204.393	29536
Alternative 3	281442	5863.375	7505.12	81255

The impact assessment that underpins these figures was premised upon the assumption that preference had been given to placing ministerial students at Methodist-owned training institutions, with primary preference given to those institutions which are wholly-owned by the Methodist Church and directly controlled by the Methodist Council. In short, current expenditure would have been applied so as firstly to make best use of capital assets understood to be directly controlled by the Methodist Council and secondly those to which the Methodist Church appoints some trustees. Subsequently, in terms of beneficial ownership, governance/ability to influence directly an entity in it has proved possible to classify training institutions thus:

	Legal Status	Entity	Notes
(i).	Integral part of the Methodist Church, controlled by the Methodist Council through a local committee.	Wesley College, Bristol	Operates from a College complex owned and developed by the Church.
		Wesley Study Centre, Durham York Institute for Community Theology Hartley Victoria College	Operates from rented accommodation.  Operates from Luther King House, in which the Methodist Church has a 4.4% stake.
(ii).	Training Forum, established under SO 340	Wales Training Network Training for Scotland	
(iii).	Restricted Charitable Trust, whose trustees are appointed by the Methodist Conference	Wesley House, Cambridge	The restriction is that the Trust Fund must be applied to a similar purpose in a defined location.
(iv).	Ecumenical Charitable Trust, some of whose trustees are appointed by the Methodist Church.	East Midlands Ministerial Training Course Southern Theological Education and Training Scheme	If wound-up the residual assets may be applied only to similar charitable purposes.
(v).	Charitable Companies, some of whose members may be Methodists	Urban Theology Unit, Sheffield Queen's Foundation, Birmingham South West Ministry Training Course Eastern Region Ministry Course South-East Institute for Theological Education	

In short, the Church has effective veto only in institutions in classifications (i) and (ii). On dissolution, trustees and company members may distribute residual assets in accordance with Trust Deeds and Memorandum of Association. This does not invalidate the analysis which is intended as indicative only.

Another underlying assumption is that those who are called to offer for ordained ministry do so unconditionally and accept the discipline of the Church as part of their training. In other words, they are expected to accept that personal inconvenience may form part of the testing of their call in the sense that for reasons of economy, training may be available only at institutions less geographically convenient for some students.

The prime data on which these impact analyses are based is a schedule showing the placement of ministerial students at the commencement of the year 2009-10 reproduced on page 136. The Strategic Development Officer (Ministries) in the Connexional Team has drawn attention to the fact that although Connexional policy emphasizes the importance of providing training for the whole people of God, funding of education and training 'follows pre-ordination training'. Nevertheless, attention is drawn to the disparity of average costs of

training across institutions quoted in Table 1 above. The weighted average cost weights a part-time student as the equivalent of half that of a full-time student. Attention is also drawn to the fact that the average cost per student varies directly with the number of students placed at a college, the more students, the lower the average cost, and conversely, the fewer the students, the higher the average cost.

The detailed impact assessments which follow are merely three of a number of possible permutations, and simply seek to show the effect of those three placement options. They offer a ‘comprehensive’ viewpoint. Comparisons by institution are not offered here for reasons of space, but are easily achieved by comparison of tables. Obviously, an Impact Assessment presented to a decision-maker would include such data as well as details of ownership, etc., as set out in the preceding table.

The first alternative continues to favour those Methodist institutions favoured under the present policy, plus Wesley College and Hartley Victoria College. The second option gives absolute precedence to Methodist institutions and especially the larger colleges. This gives the benefit of economies of scale. The third option excludes Hartley Victoria and implies that one college each in the North West, North East, East Anglia, the Midlands and the South West Regions is a viable and cost-effective means of training.

In all options, ‘compensation’ currently paid to Wesley College is excluded. Other compensation payments remain. Additionally, grants have been awarded only to institutions where ministerial students are placed. In other words, ‘external training providers’ are regarded as commercial entities to which fees are paid only for courses provided. In all permutations, attempt has been made to allocate students to the geographically nearest remaining college. *It is recognized that many of these assumptions are contrary to Connexional policies but the impact assessments are offered in order to demonstrate how policy proposals can be modelled and to demonstrate how the financial positions of both the Connexion and Wesley College could have benefitted from a different placement policy.*

*Factual base of this costing:*

*Specific sources*

*Methodology*

*Contributors*

*Reviewer(s)*

*Data reproduced in tables above and immediately below this note.*

*Data modelling*

*Richard Lindsey*

*Review Group*

Actual Allocation 2009-10

Training Institution	Students			Fees		Total	Grants			Total	Grand Total	Simple Average Cost per Student	Weighted Average Cost per Student	
	F/t	P/t	Total	Full time	Part Time		Core	Fixed	Comp.					
				£	£		£	£	£					£
Wesley College	2	2	4	10,401	6,090	16,491	74,196	19,000	43,000	136,196	152,687	38,172	50,896	
Wesley Study Centre	18	3	21	82,008	9,135	91,143	102,020	19,000		121,020	212,163	10,103	10,880	
York Institute		2	2	0	6,090	6,090	27,824	4,500	11,000	43,324	49,414	24,707	49,414	
Hartley Victoria	2	11	13	9,112	33,495	42,607	111,249	19,000	27,000	157,249	199,856	15,374	26,647	
Wesley House	18		18	82,008	0	82,008	111,294	19,000		130,294	212,302	11,795	11,795	
Queens' Foundation	24	4	28	109,344	12,180	121,524	111,294	19,000		130,294	251,818	8,994	9,685	
Scotland			0	0	0	0	45,100	10,000		55,100	55,100			
SEITE		4	4	0	12,180	12,180	9,275	4,500		13,775	25,955	6,489	12,977	
Wales		1	1	0	3,045	3,045	91,700	8,000		99,700	102,745	102,745	205,490	
St. Michael's	1	1	2	4,556	3,045	7,601					7,601	3,801	5,067	
EMMTC		2	2	0	6,090	6,090	37,098	4,500		41,598	47,688	23,844	47,688	
ERMC		3	3	0	9,135	9,135	9,275	4,500		13,775	22,910	7,637	15,273	
STETS		3	3	0	9,135	9,135	27,824	4,500		32,324	41,459	13,820	27,639	
SWMTC		1	1	0	3,045	3,045	9,275	4,500		13,775	16,820	16,820	33,639	
UTU/YICT		2	2	0	6,090	6,090	18,459	4,500	19,000	41,959	48,049	24,025	48,049	
Guy Chester Centre			0	0	0	0	18,549	4,500		23,049	23,049			
<b>Total</b>	<b>65</b>	<b>39</b>	<b>104</b>	<b>297,429</b>	<b>118,755</b>	<b>416,184</b>	<b>804,429</b>	<b>149,000</b>	<b>100,000</b>	<b>1,053,429</b>	<b>1,469,613</b>	<b>14,131</b>	<b>17,392</b>	

Alternative Allocation Model 1

Training Institution	Students			Fees		Total	Grants			Total	Grand Total	Simple Average Cost per Student	Weighted Average Cost per Student
	F/t	P/t	Total	Full time	Part Time		Core	Fixed	Comp.				
				£	£		£	£	£				
Wesley College	23	10	<b>33</b>	106,077	30,450	<b>136,527</b>	74,196	19,000		<b>93,196</b>	229,723	6,961	8,204
Wesley Study Centre	18	3	<b>21</b>	82,008	9,135	<b>91,143</b>	102,020	19,000		<b>121,020</b>	212,163	10,103	10,880
York Institute		4	<b>4</b>	0	12,180	<b>12,180</b>	27,824	4,500	11,000	<b>43,324</b>	55,504	13,876	27,752
Hartley Victoria	2	11	<b>13</b>	9,112	33,495	<b>42,607</b>	111,249	19,000	27,000	<b>157,249</b>	199,856	15,374	26,647
Wesley House	18	3	<b>21</b>	82,008	9,135	<b>91,143</b>	111,294	19,000		<b>130,294</b>	221,437	10,545	11,356
Queens' Foundation	3	6	<b>9</b>	13,668	18,270	<b>31,938</b>	111,294	19,000		<b>130,294</b>	162,232	18,026	27,039
Scotland			<b>0</b>				45,100	10,000		<b>55,100</b>	55,100		
SEITE			<b>0</b>				9,275	4,500		<b>13,775</b>	13,775		
Wales		1	<b>1</b>		3,045	<b>3,045</b>	91,700	8,000		<b>99,700</b>	102,745	102,745	205,490
St. Michael's	1	1	<b>2</b>	4,556	3,045	<b>7,601</b>					7,601	3,801	5,067
EMMTC			<b>0</b>				37,098	4,500		<b>41,598</b>	41,598		
ERMC			<b>0</b>				9,275	4,500		<b>13,775</b>	13,775		
STETS			<b>0</b>				27,824	4,500		<b>32,324</b>	32,324		
SWMTC			<b>0</b>				9,275	4,500		<b>13,775</b>	13,775		
UTU/YICT			<b>0</b>				18,459	4,500	19,000	<b>41,959</b>	41,959		
Guy Chester Centre			<b>0</b>				18,549	4,500		<b>23,049</b>	23,049		
<b>Total</b>	<b>65</b>	<b>39</b>	<b>104</b>	<b>297,429</b>	<b>118,755</b>	<b>416,184</b>	<b>804,429</b>	<b>149,000</b>	<b>57,000</b>	<b>1,010,429</b>	<b>1,426,613</b>	<b>13,717</b>	<b>16,883</b>

Alternative Allocation Model 2

Training Institution	Students			Fees		Total	Grants			Total	Grand Total	Simple Average Cost per Student	Weighted Average Cost per Student
	F/t	P/t	Total	Full time	Part Time		Core	Fixed	Comp.				
				£	£		£	£	£				
Wesley College	23	10	<b>33</b>	106,077	30,450	<b>136,527</b>	74,196	19,000		<b>93,196</b>	229,723	6,961	8,204
Wesley Study Centre	20	3	<b>23</b>	91,120	9,135	<b>100,255</b>	102,020	19,000		<b>121,020</b>	221,275	9,621	10,292
York Institute			<b>0</b>	0	0	<b>0</b>			11,000	<b>11,000</b>	11,000		
Hartley Victoria	2	17	<b>19</b>	9,112	51,765	<b>60,877</b>	111,249	19,000	27,000	<b>157,249</b>	218,126	11,480	20,774
Wesley House	19	7	<b>26</b>	86,564	21,315	<b>107,879</b>	111,294	19,000		<b>130,294</b>	238,173	9,161	10,585
Queens' Foundation			<b>0</b>										
Scotland			<b>0</b>										
SEITE			<b>0</b>										
Wales		1	<b>1</b>	0	3,045	<b>3,045</b>	91,700	8,000		<b>99,700</b>	102,745	102,745	205,490
St. Michael's	1	1	<b>2</b>	4,556	3,045	<b>7,601</b>					7,601	3,801	5,067
EMMTC			<b>0</b>										
ERMC			<b>0</b>										
STETS			<b>0</b>										
SWMTC			<b>0</b>										
UTU/YICT			<b>0</b>						19,000	<b>19,000</b>	19,000		
Guy Chester Centre			<b>0</b>										
<b>Total</b>	<b>65</b>	<b>39</b>	<b>104</b>	<b>297,429</b>	<b>118,755</b>	<b>416,184</b>	<b>490,459</b>	<b>84,000</b>	<b>57,000</b>	<b>631,459</b>	<b>1,047,643</b>	<b>10,073</b>	<b>12,398</b>

Alternative Allocation Model 3

Training Institution	Students			Fees		Total	Grants			Total	Grand Total	Simple Average Cost per Student	Weighted Average Cost per Student
	F/t	P/t	Total	Full time	Part Time		Core	Fixed	Comp.				
				£	£	£	£	£	£	£	£	£	£
Wesley College	27	21	48	124,301	63,945	188,246	74,196	19,000		93,196	281,442	5,863	7,505
Wesley Study Centre	18	3	21	82,008	9,135	91,143	102,020	19,000		121,020	212,163	10,103	10,880
York Institute			0	0	0	0			11,000	11,000	11,000		
Hartley Victoria			0	0	0	0			27,000	27,000	27,000		
Wesley House	18	3	21	82,008	9,135	91,143	111,294	19,000		130,294	221,437	10,545	11,356
Queens' Foundation	2	21	23	9,112	63,945	73,057	111,294	19,000		130,294	203,351	8,841	16,268
Scotland			0										
SEITE			0										
Wales			0										
St. Michael's			0										
EMMTC			0										
ERMC			0										
STETS			0										
SWMTC			0										
UTU/YICT			0						19,000	19,000	19,000		
Guy Chester Centre			0										
<b>Total</b>	<b>65</b>	<b>48</b>	<b>113</b>	<b>297,429</b>	<b>146,160</b>	<b>443,589</b>	<b>398,804</b>	<b>76,000</b>	<b>57,000</b>	<b>531,804</b>	<b>975,393</b>	<b>8,632</b>	<b>10,959</b>

## Option 8: That Wesley College, Bristol, be closed

In his report (see Appendix 8) John Lee identifies the likely costs of mothballing the college in the event of closure. There are, however, other associated costs, including:

- The cost of a 'Wesley College Closure' Project Team (or fees payable to an external agency).
- Professional fees for disposal of the college (perhaps by part).
- Disposal of costs (less proceeds if any) of furniture etc.
- Disposal (including packing) costs for the library.
- Professional removal costs for Heritage Collection to an unspecified academic library.
- Re-shelving of library at new location (if it is not dispersed without charge to recipient libraries).
- Possible compensation to lessees if the purchaser were to require vacant possession.
- Redundancy costs for 19 non-presbyteral staff.
- Relocation costs for Principal and Director of Studies

Assuming that Frances Greeves House continues to be let until completion of the sale of the site, fees would be payable for rent collection and rates may become payable upon the loss of charity rate relief.<sup>171</sup> Certain savings and rental income can be set against these costs, but are not sufficient to cover them:

	£
First year costs:	
Cost of mothballing	180,000
Professional Fees (rent collection)	3,000
Rates on Frances Greeves House	7,000
Outstanding liabilities to Universities	78,000
Other closure costs (see list above)	70,000
	<b>338,000</b>
Savings:	
Connexional Grant: compensation	21,000
Income from Rents:	79,000
Frances Greeves House	44,000
Investment Properties	51,000
	<b>195,000</b>
<b>First year costs to Connexion</b>	<b>143,000</b>

The outstanding liabilities to Universities are the balance of payments due for course validation and include payment to the British Accreditation Council, estimated in total to be £78,000 as at 1<sup>st</sup> September 2010, £54,400 as at 1<sup>st</sup> September 2011 and £29,700 as 1<sup>st</sup> September 2012.

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<sup>171</sup> It is a moot point whether Frances Greeves House would be regarded as a 'Hall of Residence' if the college closed.

*Factual base of this costing:*

<i>Specific sources</i>	<i>College accounts, John Lee's data, analysis of liabilities. Cost of project team – the major part of 'other costs' based upon experience as Head of the Project Division in a Public Corporation.</i>
<i>Methodology</i>	<i>See paragraphs 6.3 and 6.4</i>
<i>Contributors</i>	<i>Richard Lindsey and John Lee</i>
<i>Reviewer(s)</i>	<i>Review Group</i>

### **The combined option outlined in Section 9**

Option 4 proposes that Frances Greeves House be used to provide a service not dissimilar to that provided by MIH and that the Bristol District injects *circa* £1m capital into the new venture. Option 5 proposes the amalgamation of Wesley College with the Bristol Baptist College and that the Baptists sell their present building and inject c.£1m into the infrastructure of Wesley College. Option 6 proposes that the College should remain on its present site and develop the Conference & Resource Centre. Those options are not mutually exclusive and could be implemented in combination.

John Lee has advised (see Appendix 8) that to refurbish and enhance the main building would cost between £2.7m and £3.5m. (This would render redundant the Headingly Building which could be demolished and its site landscaped.) Against this can be set around £2m from the Bristol District and Bristol Baptist College. This would leave a potential shortfall of between £0.7m and £1.5m. On the face of it, this could be a reason for discounting this composite option. However, the Review Group considers that there are at least four possible ways of making good that shortfall. These are (a) a capital investment by the Connexion; (b) realisation (of some) of the value of the residential properties which are presently leased out by the College;<sup>172</sup> (c) funding from International contacts; and/or (d) the proceeds of a Connexional Appeal. As for (a), the Review Group notes that the Connexion made a contribution to the Queen's Foundation, Birmingham so there is good precedent for making a contribution to a new ecumenical college. As for (b) the proceeds of sale of the properties concerned would be likely to meet or go a long way towards meeting the shortfall, but would affect income.<sup>173</sup> As for (c), Dr Pye believes that overseas benefactors may be

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<sup>172</sup> The Review Group recognize that this is contrary to its criticism of previous part-sales of the original asset, but accepts that it is an option for consideration if an Ecumenical Theological College in Bristol is deemed to be a Connexional priority or desirability.

<sup>173</sup> See Note 4 below the table in para. 6.21.

willing to contribute significant funds.<sup>174</sup> As for (d), the Review Group notes that within the last decade Cliff College was given permission to launch a Connexional Appeal to raise £6m for redevelopment of its complex and was successful in raising around £2m. For these reasons, the Review Group does not consider that the need for substantial capital expenditure should debar or deter further consideration of this option.

Construction of an outline Revenue Budget for the composite option presented a challenge in that there have been only initial ‘in principle’ discussions with the Bristol Baptist College and the Review Group therefore has no firm information about the finances of the Bristol Baptist College. Nevertheless, budgets prepared from “zero-base”<sup>175</sup> have been constructed for (i) a simple combination of the colleges in the near future, and for (ii) a possible organic union of the colleges at some time in the future in a refurbished and extended college. *The Warning* set out as preamble to this Appendix is repeated: the budgets which follow are indicative, not absolute, and represent the best estimate of income and costs at the time of preparation. They are at constant (2009-10) prices and include objective assessments of likely income if the extended college is given a ‘fair wind’ and is actively marketed.<sup>176</sup>

The main assumptions of the short-term budget are that Bristol Baptist College removes to Henbury Hill as a ‘lodger unit’ and bears a reasonable rent and service charge; that Connexional grants continue as planned; and that costs broadly reflect the current budget. Some differences in costs (notably staff costs and repairs) result from the different approach to budget construction and assumptions but each element has been critically reviewed by the college staff. The budget makes provision for repairs and renewals. On this basis, there is reason to believe that in the short-term Wesley College, with Bristol Baptist College as a ‘tenant’, could operate profitably. Although the resultant outcome appears to be sufficiently resilient to withstand the planned reduction in grant (circa £108,000 after provisions), the Review Group recommends that the Connexional Team be prepared to vary the grant *if necessary* to ensure the continued operation of the college until the proposed joint venture can come into being.

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<sup>174</sup> It is unlikely that international contacts would be willing to provide capital unless they were confident that the Methodist Church was committed to retaining the college for a medium term period of, say, at least 5 to 10 years.

<sup>175</sup> ‘Zero-base budget’: one where every figure requires justification. Most budgets are ‘incremental’, where the current cost is used a base to which known variations are applied.

<sup>176</sup> Both budgets have been seen by the Principal of the Bristol Baptist College. He is content that they are indicative of what might be expected if the colleges were to work together.

Initial Joint Operation With Bristol Baptist College as a Lodger Unit				
	£		£	£
Income		Expenditure		
Fees		Staff		
MCF	13,500	Salaries/Stipends		186,200
Self-funding	87,240	Property		
Grants	93,000	Rates & Water Rates	17,000	
Rents		Insurance	10,000	
WCC Ltd	45,000	Gas/Electric	48,000	
BTC Students	182,520	Grounds	10,000	
Leases	7,871	Cleaning	13,000	
Investment Property	43,740	Security	12,140	
Service charges	4,000			110,140
Sales	3,000	Operations		
Donations	1,000	Validation	25,000	
Interest	1,500	Publicity	5,000	
		Library & Resources	10,000	
		Computers etc	1,500	
		Other	2,500	
				44,000
		Office		
		Printing & Stationery	4,500	
		Postage	1,600	
		Telephone	5,000	
		Equipment	10,000	
		Other		21,100
		Hospitality	250	
		Bank Charges	900	
		Professional Fees	3,062	
		Committee Travel	250	
				4,462
		<b>Total Expenditure</b>		<b>365,902</b>
		<b>Operating Surplus</b>		<b>116,469</b>
<b>Total Income</b>	<b>482,371</b>			<b>482,371</b>
		Operating Surplus		146,469
		Provisions		
		Repairs		18,000
		Renewals		20,000
		<b>Surplus after provisions</b>		<b>78,469</b>

The budget constructed<sup>177</sup> for a combined Methodist-Baptist Theological College with a ‘common-purse’, more strictly follows the principles of a zero-based budget and contains

<sup>177</sup> Constructed by the College staff

prudent assumptions about staffing levels, rates of pay, and cost generally.<sup>178</sup> Assumptions about student numbers, courses, and fees reflect both prudence and the opportunities that a re-invigorated and extended college community for an expansion in the number of students. Although the bases of these budgets are of necessity rooted in the present operation, they have been adjusted in an attempt to predict the effects of the new environment. Care has been taken to ensure there is no double-counting in the use of resources, and that the effects of implementation of the extended Conference & Resource Centre (see Appendix 11) are consistent with other aspects of this option. The budget is at constant prices (i.e., current prices) and suggests that the combined college could conceivably operate profitably. The surplus after provisions is marginal but that reflects the uncertainties relating to the current income and costs of the Bristol Baptist College. A more certain budget can be constructed only after negotiations with Bristol Baptist College reach the stage where ‘books are opened’ for scrutiny.

The budget which follows has been prepared with due rigor and is optimistic as to the potential for expanding student numbers. The figures disclosed at paragraph 7.24 suggest that such optimism is appropriate. Moreover, as the Principal of the Bristol Baptist College considers both budgets to be illustrative of his expectations of the Colleges working together, the view is taken that the budget is the best that can be achieved on the basis of presently available information and is sufficiently reliable to inform a decision as to whether or not this option merits further investigation.

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<sup>178</sup> In this context ‘prudence’ requires a pessimistic view be taken of costs, i.e., to incline to worse result than is desired.

Mature Ongoing Joint Operation				
	£		£	£
Income		Expenditure		
Fees		Staff		
MCF	13,500			261,000
Self-funding	166,320	Property		
Baptist	97,800	Rates & Water Rates	21,250	
Rents		Insurance	12,500	
WCC Ltd	45,000	Gas/Electric	71,000	
BTC Students	192,640	Grounds	10,000	
Leases	7,871	Cleaning	15,125	
Investment Property	43,740	Security	15,500	
Service charges				145,375
Sales	6,000	Operations		
Donations	2,000	Validation	30,000	
Interest	3,000	Publicity	7,500	
		Library & Resources	12,500	
		Computers etc	3,000	
		Other	5,000	
				58,000
		Office		
		Printing & Stationery	6,750	
		Postage	1,600	
		Telephone	7,500	
		Equipment	15,000	
				30,850
		Other		
		Interest to Bristol District	18,000	
		Hospitality	375	
		Bank Charges	1,350	
		Professional Fees	3,062	
		Committee Travel	375	
				23,162
		<b>Total Expenditure</b>		<b>518,387</b>
		<b>Operating Surplus</b>		<b>59,484</b>
<b>Total Income</b>	<b>577,871</b>			<b>577,871</b>
		Operating Surplus		59,484
		Provisions		
		Repairs		18,000
		Renewals		20,000
		<b>Surplus after provisions</b>		<b>21,484</b>

*Factual base of this costing:*

*Specific sources*

*Methodology*

*Contributors*

*Reviewer(s)*

*College accounts, John Lee's data.*

*See paragraphs 6.3 and 6.4. 'Zero-based' budgeting.*

*Richard Lindsey, John Lee and College representatives.*

*Richard Lindsey.*

## **Appendix 11: Proposal for Wesley Conference and Resource Centre**

### **1.0 Vision**

To treasure and build on Methodist heritage and tradition and enable the Church to develop discipleship and mission for the future.

### **2.0 Context**

Wesley College, as the core institution in the South/South West Regional Training Network, would be at the heart of the Conference and Resource Centre.

The key aspects of this proposal build on and extend essential existing and potential elements of the College and the Conference Centre. In particular the proposal highlights the Methodist archives at Wesley which contain unique material. Their potential is particularly significant with Bristol also containing the New Room, the oldest Methodist chapel in the world, and Charles Wesley's house.

For overseas students Wesley is licensed by the British Accreditation Council as a Higher Education Institution

### **3.0 Objectives**

- To equip Christians in the region for discipleship and mission
- To promote theological excellence
- To enable vocational discernment and formation of presbyters and deacons
- To maintain and develop academic, ecumenical, Methodist and community partnerships
- To safeguard, develop and utilise Methodist archives and library
- To provide resources and learning opportunities to local, regional, national and international students
- To provide facilities for secular organisations

## **4.0 Opportunities**

### **4.1 Developing as a Resource Centre for Methodist Heritage**

#### **4.1.1 Location in a World Methodist Heritage City**

This utilises the rich archives and fine library and would be a partnership with the New Room and Charles Wesley's House; all three are based in Bristol which is a World Methodist Heritage City. The international market is significant, there are 70 million people connected to Methodism world wide of 300,000 in UK. The two countries with the largest Methodist membership are US and Korea.

Possibilities have already been explored over the past five years to obtain significant capital investment from international partners. The insecurities of recent years with almost constant review have meant that these have not been able to be pursued to date although conversations remain open with specific partners in both Korea and the USA.

#### **4.1.2 Heritage Courses**

There is currently an annual International Heritage Course based at Wesley. This a two week summer school and involves teaching, study and a tour of the key Methodist heritage sites including Cornwall. In the past the students have been mainly from Korea but there is some evidence that Methodists from other parts of the world would be interested. This course could be run twice a year.

#### **4.1.3 Heritage Tours and Weekends**

There is potential to develop Methodist heritage tours and heritage weekends for international visitors. In addition to the high number of individual international visitors to the New Room, there are in the region of 20 organised tours, each comprising approximately 20 overseas visitors. These tours, mainly from the US, use hotel accommodation and do not get the opportunity to visit the Wesley archives.

Some tours from the US involve choirs and it is worth noting that the Methodist Music Society collection is also held at Wesley so could add another interest for some overseas Methodist visitors.

#### **4.1.4 Other Heritage markets**

There would also be a national market for heritage weekends and for a link with choirs.

The number of individual international visiting scholars could be increased.

## **4.2 Extending the Existing Programme**

### **4.2.1 Increasing the uptake of courses**

Existing courses have the capacity for increasing numbers of students with marginal additional costs; this includes all levels of degree courses.

Recruiting students in the last couple of years has been affected by the constant review and concomitant uncertainty.

Wesley on the Road, although in its early stages, has demonstrated that students can be reached in other parts of the region. Some will then be attracted to accessing degrees or other courses at the Centre.

### **4.2.2 Additional Courses**

There is a market for additional courses – some would be run and owned by Wesley, some franchised and some hosted.

A number of courses have been identified by the Staff:

- Introduction to Chaplaincy courses (in collaboration with the Churches Council for Industry and Social Responsibility and with St Michael's Llandaff who offer MTh in Chaplaincy.)
- Local Preachers' training and development
- Pastoral Care Courses including e.g. support in bereavement, divorce, dementia.
- Celtic Spirituality
- Methodist Heritage Courses as above

One of the roles of the Regional Training Networks is to identify training needs and the Training Officer has embarked on this but was only appointed last September.

Wesley's use of Associate Tutors provides flexibility and a wide range of staff expertise.

Some courses would be run at the Conference and Resource Centre and some would also be delivered as part of Wesley on the Road.

### 4.3 Increasing the Use of Conference Facilities

The provision of ensuite accommodation could increase occupancy and therefore income by a significant amount. Anecdotal evidence shows that bookings of ensuite rooms are significantly higher than standard rooms and participants in some external conferences choose to stay in a local hotel due to the absence of en suites.

Another Christian Conference Centre following major refurbishment cites in its annual report that “the improved financial performance is due in a large part to the increased level of bookings, thus vindicating the decision to spend £2m upgrading the Centre’s accommodation and facilities.”<sup>179</sup>

Wesley Conference and Resource Centre has the potential to accommodate a number of Connexional residential committee meetings. Currently the Methodist church pays various non Methodist institutions for accommodation.

The Conference Centre would continue to accommodate commercial, and public sector conferences. These both provide an opportunity for engagement with ‘non church’ and can provide a subsidy to users from the voluntary sector.

The Conference and Resource Centre would also extend the Christian/church usage, e.g. church weekends and church away days. Many churches look for facilities for these and often struggle to identify people to lead or guide their weekends. The Centre could offer both accommodation and direction/content for some such events. The appointment commencing this year of two part-time tutors who are also part-time in circuit will help develop contacts with the Bristol and South Gloucester Circuit of 2,500 members.

### 5.0 Benefits

The Conference and Resource Centre would:

- 5.1** Benefit the whole Methodist Church (local, regional, connexional and world wide) through:
- Range of courses for lay, preordained and ordained

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<sup>179</sup> The Ammerdown Centre Annual Report 2006

- Accommodation for residential committees and events
- Understanding of Methodist Heritage
- Access to rich archives and fine library

5.2 Benefit the South/South West Regional Training Network as the Core Institution through:

- Staff
- Residential accommodation when needed
- Range of courses
- Archives
- Library

5.3 Benefit ecumenical partners through:

- Courses
- Accommodation for committees, church weekends, events.

5.4 Provide responsible and effective stewardship of the excellent staff, library, archives and building.

## 6.0 Financial Gains

Below are examples of the increased income from some of the different aspects of such a venture

- Income from a second two week Heritage Course would be in the region of an additional £8,000.
- Each additional Foundation Degree student would bring in £1,500, the college believe that a total of 10 students could be recruited for each of the two years.
- Each additional student on a module would bring in £100 and up to 50 students a year would be a possibility.
- It is hoped to increase the number of BA students at £10,000 over 3 years and MA students at £5000 per student
- With ensuite accommodation the occupancy of bedrooms for courses and conferences could be improved by 50% with current number of rooms this could produce an additional income of £56,000
- Each Heritage Weekend of 20 people could provide income in the region of £2,000 for accommodation and food.

Without a robust feasibility study it is not possible to provide detailed figures or certain predictions about the markets for various courses. Conservative projections indicate that with a refurbished building and adequate resources in marketing an income increase in the region of more than £100,000 could be generated. This is outlined in the table below.

Source	Aspiration		Realistic target	
	Numbers	Income £	Numbers	Income £
Second heritage course	1 course	8,000	1 course	8,000
Foundation Degree	20 students	30,000	10 students	15,000
Various modules	50 students	5,000	30 students	3,000
MA students	15 students	75,000	5 students	25,000
Increased occupancy for conferences and courses	60% increase	66,000*	50% increase	56,000*
Heritage weekend	8 weekends	16,000	5 weekends	10,000
<b>TOTAL</b>		<b>£200,000</b>		<b>£117,000</b>

\* This figure allows for a 30% loss of bedrooms due to creating ensuite rooms at an appropriate standard as indicated in the architect's report.

The above figures only use some of the proposals. E.g. they do not include BA students or any new course proposals such as chaplaincy or residential costs from individual overseas scholars. There are therefore additional sources of income.

## 7.0 Costs

### 7.1 Capital Investment

The single major cost would be capital investment to refurbish the building.

The report by John Lee provides estimates for the cost of capital development. The provision of en suite accommodation and the appropriate display of the archives are essential.

As indicated at 4.1.1 possible capital investment from international partners has been explored but could not be pursued in a period of uncertainty. It is envisaged that such investment would be used to enhance and promote the international significance of Wesley College and its archives within its particular Methodist setting through the development of, for example, a new visitor and research centre. Such a project would also impact positively on other income generation areas such as accommodation and dining facilities.

## **7.2 Revenue Costs**

Increased revenue costs for staff and accommodation would vary. There would be little or marginal cost to some increase in numbers of students on existing courses.

Additional costs through new ventures would be met through the additional income.

## **8.0 Risks**

It is recognised that in the current climate, many organisations are reducing their training budgets which can impact markedly on conference centres. However some institutions are seeking less expensive venues which has already benefited Wesley. The recession is not permanent and in the longer term the needs for training and development will continue. This proposal is a long term plan.

During the time of refurbishment there will be a loss of income and the need for alternative accommodation for essential activities.

## **9.0 Keys to success**

The success of this proposal would rely on:

- The refurbishment of the accommodation including essential provision of en suites and facilities to display and access the archives.
- A clear commitment by the Methodist Church to the continuation of Wesley College in Bristol as the core institution for the South/South West RTN. Uncertainty over several years has seriously affected the recruitment of students to courses.
- Effective and extensive marketing.
- Change in understanding of some congregations who believe that Wesley is provided by the Methodist church and is therefore free or subsidised for their use.
- Recognition that this would not happen overnight or within a couple of years.
- Provision of transitional support.
- The proposal could be combined with other options which are being explored.