

DIOCESE OF SALFORD

# Property Management Handbook

2021

Note: This Handbook and all forms referred to within it are available for download from the resources section of the diocesan website ([www.dioceseofsalford.org.uk](http://www.dioceseofsalford.org.uk))

# Bishop's Foreword

The Diocese of Salford has a great deal of property and, from several points of view, this is a great asset which not only provides for places of worship, residence and social action but also gives us a financial security if it is well maintained.

The care for, and proper maintenance of, property must be among our priorities. It is a matter of good stewardship. Where property falls into disrepair it becomes a liability, and a liability that very quickly escalates. It can easily happen that more money is needed to be spent on returning a property to good repair than the property is actually worth.

Questions about the maintenance of property was not included in our priestly formation. Nor should it have been so! I do not think that priests should be expected to have more than a very elementary understanding of building maintenance. But it is very important that every building is regularly inspected, so that routine maintenance is carried out, and any faults can be identified at an early stage, avoiding unnecessary extra work and additional costs later.

Many of our parish communities will have parishioners with building knowledge and expertise. Please ask such experts to make regular inspections of parish buildings and report on any need for maintenance and repair. Where parishes do not have people with such knowledge, the Diocesan Property Office can be responsible for making a regular inspection.

In recent years, very considerable amounts of money have been spent on buildings because of neglect. That expenditure could have been largely avoided if there had been careful and regular oversight. There have been cases where priests have not been able to move to their new appointment because the presbyteries have been in a sad state of disrepair. We need to be careful stewards of the property where we live.

The Diocesan Property Office is able to carry out regular inspections and I have asked the deans to be aware of properties whenever they are visiting priests within the deanery. Please accommodate these diocesan or deanery visits and be sure to report, at any other time, the need for repair. We have a joint responsibility to see that all diocesan property is well maintained.

I hope that this *Property Management Handbook* will be of great assistance to you and to those parishioners who work with you in the care of our many buildings and sites, together with those building professionals who engage with us.

With my thanks and best wishes

Bishop John Arnold

## Who to contact.

Working as part of our Professional Support Services, our parishes are supported by a Parish Support Team for all capital projects:

Parish Support Team for Capital Projects		
Estates & Facilities Team	Finance Team	Projects Team
Providing professional support from building and quantity surveyors. Ensuring parishes are guided through the process.	Providing financial support to the parishes on all aspects of their work.	Providing project management support on large & small projects as required and providing funding advice & bid writing on grants.

### Estates and Facilities Team Contacts

[john.corrigan@dioceseofsalford.org.uk](mailto:john.corrigan@dioceseofsalford.org.uk) – 07917 006900

John is the Diocesan Director of Property and Facilities and a Quantity Surveyor. John has the strategic overview of all properties and related activities for the diocese.

[matthew.barnes@dioceseofsalford.org.uk](mailto:matthew.barnes@dioceseofsalford.org.uk) – 07811 342396

Matthew is a Diocesan Building Surveyor and currently supports the south of the diocese, the deaneries of St Ambrose Barlow, St Chad and Mount Carmel. Matthew also manages the cemeteries of St Joseph's, Moston and St Mary's, Wardley.

[david.farrington@dioceseofsalford.org.uk](mailto:david.farrington@dioceseofsalford.org.uk) - 07423 127711

David is a Diocesan Building Surveyor and currently supports the central part of the diocese, the deaneries of St John, St Therese of Lisieux and St Joseph. David is also the resident expert on historic buildings

[waheed.masters@dioceseofsalford.org.uk](mailto:waheed.masters@dioceseofsalford.org.uk) – 07425 285135

Waheed is Diocesan Building Surveyor and currently supports the north of the diocese the north of the diocese, the Deanery of St John Southworth and the Deanery of St John Vianney

[michael.moir@dioceseofsalford.org.uk](mailto:michael.moir@dioceseofsalford.org.uk) – 07741 902100

Michael is the Health and Safety advisor for the Diocese largely responsible for Health and Safety on Parish and other Diocesan Property and Statutory Compliance of the Diocesan Estate.

### Finance Team Contacts

[nicola.cosens@dioceseofsalford.org.uk](mailto:nicola.cosens@dioceseofsalford.org.uk) – 07553 708760

Nicola Cosens heads up the Parish Business Partnering, and is Deputy Financial Secretary, the role of this team is to support the parishes on all financial aspects of their work, including capital bids.

[helen.whall@dioceseofsalford.org.uk](mailto:helen.whall@dioceseofsalford.org.uk) – 07435 988501

Helen is Parish Accountant – Helen’s role is to work with Nicola on the support of the parishes, this will include the rolling out of new accounting software, ensuring that the contactless technology is in all churches that require this, and to provide day to day financial support

[aleksander.sadiku@dioceseofsalford.org.uk](mailto:aleksander.sadiku@dioceseofsalford.org.uk) – 07435 987458

Alek as Property Accountant will assist Nicola in providing professional finance support for both the parishes and the property team.

### **Project Team Contacts**

[lisa.heywood@dioceseofsalford.org.uk](mailto:lisa.heywood@dioceseofsalford.org.uk) – 07717 075587

Lisa leads the Project Management support on large & small projects as required across the diocese, Lisa also provides funding advice & bid writing on grants on large capital grants.

[sara.williams@dioceseofsalford.org.uk](mailto:sara.williams@dioceseofsalford.org.uk)

Sara is the diocesan grant and bid writer, and works with Lisa on sourcing funding, writing bids and assisting parishes in the management of grants.

## **Terms of Reference of Diocesan Property Committee**

The purpose of the Diocesan Property Committee is to have oversight of all diocesan property, under the Trustees Planning and Resources Committee which has responsibility in civil law for the diocesan and parish property under the trustees' control.

### **Membership**

The committee includes within its composition the following persons:

#### *Members*

- Three Diocesan Trustees (one of whom is Chair), and the Financial Secretary

#### *Professional Advisors*

- The Chief Operating Officer, if different from Financial Secretary
- Director of Estates & Facilities Management
- Parish Business Partner
- Members of the property & finance teams as appropriate

### **Terms of Reference**

The Committee is to provide oversight of and take decisions, on behalf of the Trustees, in respect of diocesan and parish property (including cemeteries) under the trustees' control, with regard to the following:

1. Proposing an annual budget to the trustees for capital expenditure and overseeing its allocation from year to year.
2. Approving parish projects and diocesan projects, with the exception of the school estate.
3. Approving expenditure, including loans.
4. Overseeing property acquisition and disposal, including leasing.
5. Ensuring quinquennial inspections are undertaken and satisfying trustee responsibility for statutory compliance.
6. Dealing with all matters of health and safety in relation to the Property of the Diocese.
7. Matters of general administration or of a general purpose relating to Property.
8. Any other matter relating to Property referred to the committee by the trustees with the prior approval of the bishop.

## Wholly Owned Subsidiary Companies

The trustees also own various subsidiary companies which either manage or operate properties on behalf of the Trust. The most common of these is SDC Trading Limited which operates premises licensed for the sale of alcohol or entertainment. A separate Board of Directors exists for each of these companies who have day-to-day control of the operations. For matters in relation to expenditure above £5,000 relating to the fabric of the building, these should be referred to the Diocesan Property Committee for review and approval in the same way as with other diocesan property.

SDC Property is parish owned property and therefore is a parish asset and must follow the normal parish procedures.

## Frequency of Meetings

The Committee will meet monthly, and the date of the committee will be published annually in advance (normally in December when approved by the Diocesan Trustees)

## Delegated Authority

The Diocesan Trustees have agreed to a scheme of delegation which allows some decisions to be made by particular diocesan officers. So:

<b>Expenditure</b>	<b>Decision Maker</b>
Expenditure up to £5,000	Parish Priest
Expenditure up to £25,000	Director of Estate & Facilities Management
Expenditure up to £50,000	Moderator of the Curia or Chief Operating Officer
Expenditure up to £500,000	Property Committee
Expenditure Over £500,000	Diocesan Trustees

# Applications for Capital Expenditure

## Guidance Notes

The purpose of this guidance is to set an outline of the policy and processes that are to be followed in bringing forward capital projects to the Diocesan Property Committee for approval by that Committee on behalf of the Diocesan Trustees. The process is also intended to assist the Committee in responding to capital project requests in a timely and efficient manner, linking those projects to the planning and strategic needs of the Diocese and our parishes.

### Policy

The Diocesan Property Committee is delegated to maintain and enhance Diocesan and Parish property across the Diocese, in accordance with the Diocesan Trust Deed. Policy considerations of the Diocesan Property Committee include the following: -

- Strategic oversight of our parishes and priority of need – providing, maintaining and sustaining the best facilities we can within available funding.
- An option for the poor, whatever form that poverty might take.
- The best and fairest use of diocesan resources – equality of provision across the diocese and consideration of the effect on neighbouring parishes of any decisions made.
- The priorities of safeguarding and Health and Safety.

In support of the above, an application and approval process has been developed for capital projects. It should be stated that parishes can apply on the forms for all projects regardless of value, albeit parishes are at liberty to commission works up to £5,000 without prior approval. However, our advice would be to use the services of the property team for all but the simplest of projects given the HSE requirement to appoint a 'principal designer' for any project that requires more than one contractor (including subcontractors).

In order to keep the process as simple as possible there are just four forms applicable to the system, details and use of which are outlined below.

Forms should be submitted in line with the timetable within this report that is ten working days before next Property Committee meeting. These meetings are scheduled monthly to allow as much flexibility as we can to parishes. Applications will be considered, and responsible persons informed of decisions as soon as practical after the meeting. Capital projects will be tested against the following agreed criteria:

- safeguarding
- health & safety
- condition
- accessibility
- suitability

Monitoring of expenditure on projects will be managed centrally on a bespoke system developed for the purpose. However, this will mean that approvals will have to be in place to permit projects to progress.

Payments on approved projects will be managed centrally by the finance office, in conjunction with the Parish Support Team. In order for payments to be made approvals must be in place for the scheme.



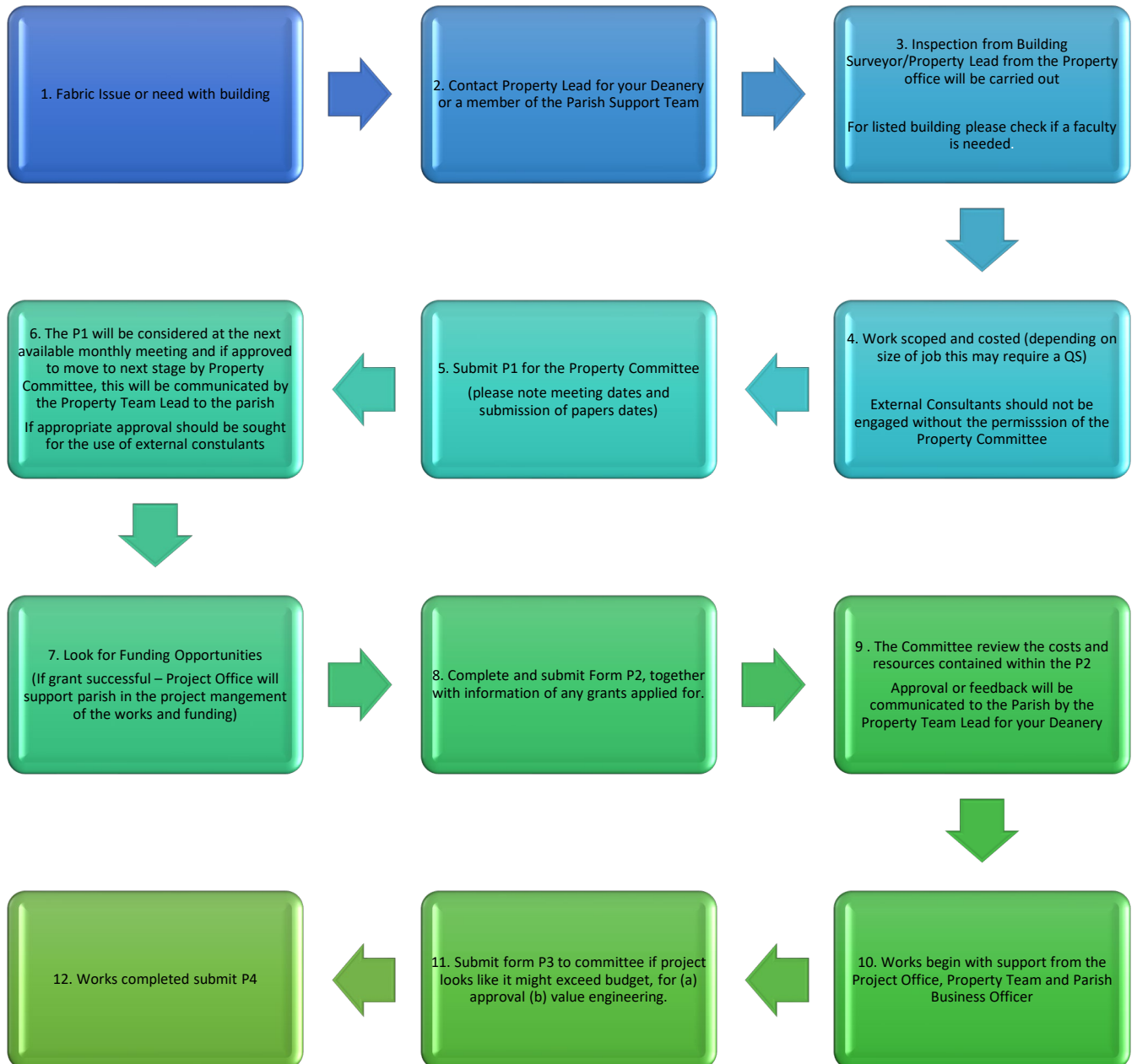
## Dates of Meetings for 2021

The property Committee meets monthly on the first Thursday of the month at 2pm where possible. The meetings for 2021 are likely to be a mixture of online and in person meetings:

<b>Date of Meeting</b>	<b>Papers from Parishes to be submitted by</b>
8 <sup>th</sup> April 2021	25 <sup>th</sup> March 2021
6 <sup>th</sup> May 2021	22 <sup>nd</sup> April 2021
3 <sup>rd</sup> June 2021	20 <sup>th</sup> May 2021
1 <sup>st</sup> July 2021	17 <sup>th</sup> June 2021
5 <sup>th</sup> August 2021	22 <sup>nd</sup> July 2021
2 <sup>nd</sup> September 2021	19 <sup>th</sup> August 2021
7 <sup>th</sup> October 2021	23 <sup>rd</sup> September 2021
4 <sup>th</sup> November 2021	21 <sup>st</sup> October 2021
2 <sup>nd</sup> December 2021	18 <sup>th</sup> November 2021

Papers for the meetings must be submitted **at least 10 working days** before the meeting to allow the property team time to review and submit the papers for consideration at the committee, papers received after the submission date will be dealt with at a future meeting.

## Flow Diagram for guidance on Capital Expenditure

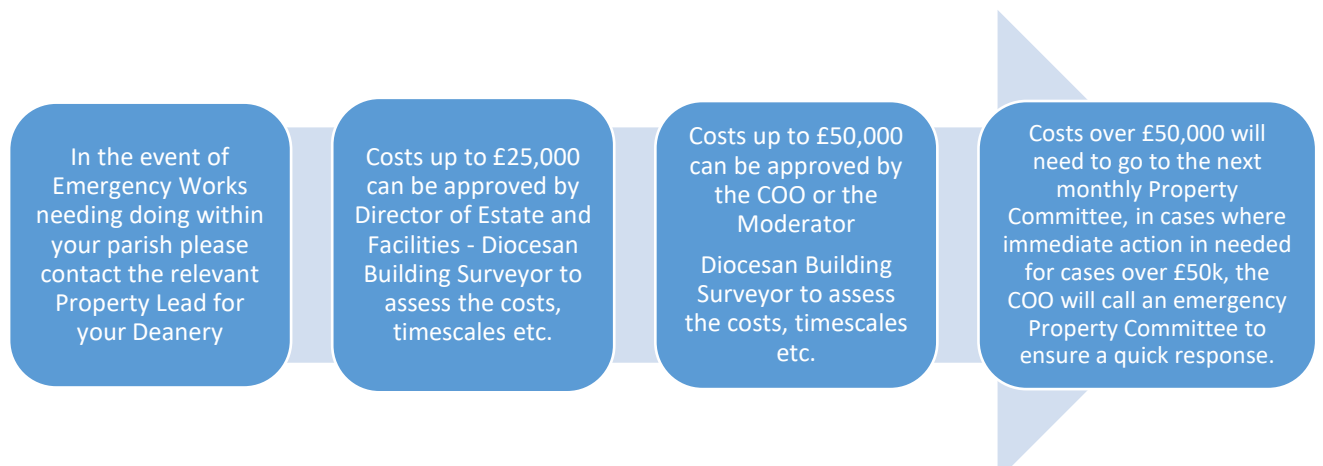


## Flow Diagram for guidance on Emergency Capital Expenditure

For emergency works that are needed that cannot wait for the next meeting of the Property Committee, please follow the process below:

- Works up to £25,000 can be approved by the Director of Estates & Facilities
- Works up to £50,000 can be approved by the Chief Operating Officer (COO) or Moderator of the Curia
- Works over £50,000 will require a special meeting of the Property Committee.

If the works result in an Insurance Claim, please follow the guidance below:



For all emergency works please consider if any insurance claim is required. All Insurance queries should be directed/communicated to Lisa Heywood ([lisa.heywood@dioceseofsalford.org.uk](mailto:lisa.heywood@dioceseofsalford.org.uk))

If possible, the completed claim form should be submitted within 14 days of notification and full claim details forwarded within 3 months of the date of the incident. Delay could prejudice your claim.

Claims should be handled as follows depending on the size and/or nature of the loss:

### Up to £1,000 (Inc. VAT)

Work may proceed on replacement or reinstatement as soon as a claim form has been submitted but please note that any work undertaken before a claim has been accepted by The Catholic National Mutual Limited ("CNM") is at your own risk. If you do make any payments, please forward the receipted invoices.

### £1,000 - £5,000 (Inc. VAT)

Two estimates must be obtained and forwarded to CNM for approval. Work must not proceed (other than emergency work) until approval from CNM has been provided.

Over £5,000 (Inc. VAT); or

Drainage, Wet/Dry Rot or Subsidence losses regardless of their value

Work must not proceed (other than emergency work) until a loss adjuster has visited the property who will then provide advice as to how to proceed.

Professional advisers (e.g. architects, surveyors and engineers) should not be instructed on any potential insurance claim until such time as authority has been given, either by CNM or its appointed loss adjuster.

## Capital Expenditure Forms

### **Form P1: Application for Capital Expenditure Approval**

Initial application for projects covered by quotation or requiring estimate stage approval. Applications for capital expenditure are invited from responsible persons. The form along with all relevant supporting information in terms of justification, drawings, quotes and estimates must be signed by the parish priest.

A lead from the Property Team will be appointed to assist with the estimate cost/size of the project.

All applications will be considered against available parochial funds as provided by the finance office. However, lack of funding will not necessarily preclude a necessary scheme from being approved, in the same way that just because funds are available schemes may not be approved. It will depend on strategic decisions and priorities for funding across the diocesan estate set against the available budget.

For listed building please check if a faculty is needed.

### **Form P2: Application for Tender Stage Approval**

Where projects have been given estimate stage approval this form will be submitted on receipt of tenders. Information of any grants applied for must be included on the P2 form.

### **Form P3: Application for Additional Expenditure**

Where projects require approval of additional cost due to unforeseen events, application should be made on Form P3. Additional costs **should not** be expended without prior approval so where necessary forms should be submitted in a timely fashion, in order that agreement can be reached regarding additional approvals or reductions in the approved scheme to accommodate the costs.

### **Form P4: Statement of Final Costs**

On completion of the works, or if relevant at the end of the defects liability period, submission of Form P4 should be made identifying the final costs and recording any external funding received for the project in order that our records are up to date on the project finances.



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## APPLICATION TO THE DIOCESAN PROPERTY COMMITTEE FOR CAPITAL EXPENDITURE APPROVAL

To be returned to the Property Department  
Cathedral Centre, 3 Ford Street, Salford, M3 6DP  
Telephone 0161 817 2222 Option 2  
Email: [property@dioceseofsalford.org.uk](mailto:property@dioceseofsalford.org.uk)

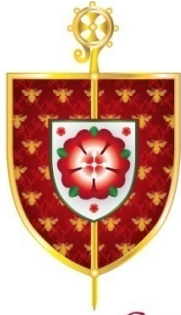
### Form P1

Completion of this form is to ensure that you have the initial approval of the Diocesan Trustees' Property Committee to proceed with proposed capital expenditure. Once received, the application will be acknowledged and notification of agreement to proceed or not will be sent following the first committee meeting after the submission is received.

<b>Name of Parish</b>			
Parish Priest			
Property [e.g. church/presbytery/hall]		Parish Ref:	
Address			
Post Code		Telephone number	
Email			
<b>Nature of the proposed work</b> [please describe briefly the proposed project]			

<b>Name of Property Team Lead</b> [where applicable]				
<b>Finance</b>	£		Current Account	Deposit Account
Estimated cost of the project		Parish bank account balances		
<b>Parish Finance Committee</b>				
Have you consulted the Parish Finance Committee?				
What is the view of the Parish Finance Committee of this project?				
<b>Signature of the Parish Priest</b>				
Date				

<b>FOR OFFICE USE ONLY</b>	
Application received	
Application acknowledged	
Approved by the Diocesan Property Committee to proceed	
Project title assigned	
Project number assigned	
Approval notification sent	
Comments	



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## APPLICATION TO THE DIOCESAN PROPERTY COMMITTEE FOR TENDER STAGE APPROVAL

To be returned to the Property Department  
Cathedral Centre, 3 Ford Street, Salford, M3 6DP  
Telephone 0161 817 2222 Option 2  
Email: [property@dioceseofsalford.org.uk](mailto:property@dioceseofsalford.org.uk)

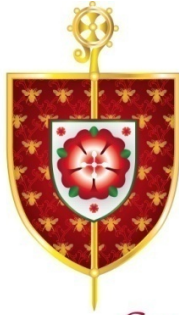
### Form P2

Completion of this form is to ensure that you have the approval of the Diocesan Trustees' Property Committee to proceed with capital expenditure, following receipt of tenders. Notification of agreement to proceed or not will be sent following the first committee meeting after the submission is received.

<b>Name of Parish</b>						
Parish Priest						
Property [e.g. church/presbytery/hall]				Parish Ref:		
Address						
Post Code				Telephone number		
Email						
Project title [from approval letter]				Project number [from approval letter]		
<b>Name of Property Team Lead</b>						
<b>Has an application for external funding been made?</b>						
<b>Name of Funder</b>						
<b>How much has been applied for?</b>						
<b>What is the expected decision date?</b>						
<b>Tender Date</b>				<b>Tender expiry</b>		
<b>Expected start date</b>				<b>Contract period</b>		



Please advise on procurement method [e.g. single stage selective; quotation etc.]		
Three lowest tenders		
Please attach a tender report giving details of any modifications made with cost implications		
<b>Gross cost of the project</b> including VAT and Fees		
<b>Gross cost distributed as shown</b>		
Buildings work		
VAT		
Professional fees		
VAT on professional fees		
Total cost		
<b>Signature of the Property Team Lead</b>		
Date		
<b>Signature of the parish priest</b>		
Date		
<b>FOR OFFICE USE ONLY</b>		
Received		
Acknowledged		
Approved by the Diocesan Property Committee		
Approval notification sent to the parish priest		
Approval notification sent to the Property Team Lead		
Comments [including details of which tender is accepted and the reasons for acceptance.		



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## APPLICATION TO THE DIOCESAN PROPERTY COMMITTEE FOR ADDITIONAL EXPENDITURE APPROVAL

To be returned to the Property Department  
Cathedral Centre, 3 Ford Street, Salford, M3 6DP  
Telephone 0161 817 2222 Option 2  
Email: [property@dioceseofsalford.org.uk](mailto:property@dioceseofsalford.org.uk)

### Form P3

Completion of this form is to ensure that you have the approval of the Diocesan Trustees' Property Committee for additional costs to a project. Notification of agreement to proceed or to make adjustments to the project will be sent following the first committee meeting after the submission is received.

<b>Name of Parish</b>			
Parish Priest			
Property [e.g. church/presbytery/hall]		Parish Ref:	
Address			
Post Code		Telephone number	
Email			
Project title [from approval letter]		Project number [from approval letter]	

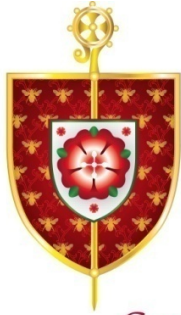
<b>Name of Property Team Lead</b>	
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<b>Reasons for additional costs</b> [please describe briefly the reasons for additional costs]

Approved costs	
Additional costs	
Revised total costs	
Grants Received	

<b>Signature of the Property Team Lead</b>	
Date	
<b>Signature of the Parish Priest</b>	
Date	

<b>FOR OFFICE USE ONLY</b>	
Received	
Acknowledged	
Approved by the Diocesan Property Committee	
Approval notification sent	
Comments	



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## REPORT TO THE DIOCESAN PROPERTY COMMITTEE STATEMENT OF FINAL PROJECT COSTS

To be returned to the Property Department  
Cathedral Centre, 3 Ford Street, Salford, M3 6DP  
Telephone 0161 817 2222 Option 2  
Email: [property@dioceseofsalford.org.uk](mailto:property@dioceseofsalford.org.uk)

### Form P4

Completion of this form is to ensure that the Diocesan Trustees' Property Committee has a summary of the overall project costs. Please attach a copy of the agreed final account summary to this form.

<b>Name of Parish</b>			
Property [e.g. church/presbytery/hall]		Parish Ref:	
Address			
Post Code		Email	
Parish Priest		Telephone number	
Project title [from approval letter]		Project number [from approval letter]	
Approved costs			
Building work			
VAT on building work			
Professional fees			
VAT on professional fees			
Furniture, fixtures and fittings			
External Funding Awarded			
Agreed final costs			
<b>Signature of the Property Team Lead</b>			
Date			
<b>Signature of the Parish Priest</b>			
Date			

<b>FOR OFFICE USE ONLY</b>	
Received	
Acknowledged	
Noted by the Diocesan Property Committee	
Comments	

## **Strategic Objectives 2021-25**

Our buildings are an essential tool in the delivery of the mission of the Church. The Diocesan Property Office, together with the Parish Business Partnering Team and the Diocesan Project Manager, will work together to ensure that the strategy places the mission of the Church at its core.

We recognise the need to be proactive to ensure the regulatory compliance and general improvement in the condition of parish churches, presbyteries and other properties belonging to the parishes of the Diocese.

The initial steps to ensure the effective delivery of the strategy will include:

- Additional capacity has been brought into the property team (with the recruitment of health and safety co-ordinator, building surveyors and administrative support), to now allow the team to provide a more holistic approach to the service and less reliance on external agencies.
- Continuing to monitor, define, distribute and implement clear policies and procedures to establish proper systems for planning and co-ordinating works for the parishes and include regular feedback to and from parishes.
- Ensuring that our newly appointed staff are working to a new specified standard form, to complete quinquennial surveys.
- Collaboration with parishes to begin implementing works identified, including the identification of suitable lay volunteers who will be able to communicate with the property office and carry out basic checks required by regulations.
- Collate data gathered through surveys to look towards future development plans.
- Annual review of this strategy to ensure the strategy is being implemented and is fit for purpose for the diocese.

It is expected that the property office, together the other parts of the Parish Support Team, will establish a firm foundation for a longer-term strategy to safeguard the diocesan and parish estate for future generations.

### **Objective 1: Health, safety and welfare**

**“Ensure the health, safety and welfare of clergy, employees, parishioners and visitors through a systematic approach to identifying hazards and controlling risks.”**

**Our Key Actions will include:**

- Reviewing current Health & Safety policies and where appropriate implementing new policies and procedures.
- Continue to review and update critical risk assessments to identify hazards and propose appropriate controls including those of fire, asbestos, water, hygiene etc.
- Continue with the delivery of the programme of training to support and enhance knowledge among clergy, employees, volunteers and parishioners regarding health, safety and welfare.

## **Objective 2: Property and Estates**

- A) “Inspect the condition of all land, property and estates and provide and implement action plans to ensure planned preventative maintenance and upkeep are delivered.”**

### **Our Key Actions will include:**

- Implement a coherent, standardised approach for the condition inspection and survey of buildings and mechanical and electrical infrastructure.
- Ensure that each parish has an up-to-date asset register to include valuable items (with due regard to canonical requirements)
- Devise and implement a programme of training to support and enhance knowledge among clergy, employees, volunteers and parishioners regarding property matters.
- Encourage the development of local support systems through local parish property and safety representatives.
- Implement adequate tracking system for all enquiries from parishes.
- Ensure that the impact on the environment is considered in each condition survey incorporating any opportunities to reduce energy / fuel consumption and water usage.

- B) “Ensure compliance with required standards of statutory inspections of plant and equipment across the entire diocesan and parish estate.”**

### **Our Key Actions will include:**

- Develop a schedule of requirements for each individual property to include all areas which may require a statutory inspection (e.g. fire alarms, emergency lighting, gas heating systems, etc.)

## **Objective 3: Development**

**“Ensure that every parish has a sustainable development plan identifying essential works as well as longer-term vision and needs with the appropriate allocation of funding.”**

### **Our Key Actions will include:**

- Work with the expanded internal team to respond to the diverse needs of the Diocesan/Deanery/parish structure supported by outsourced consultants.
- Work with Parish Priests and their committees in developing an overview and aspirational plan for their parish assets based on the needs of the parish community now, and as far as possible into the future.
- Supporting parishes with feasibility studies for the use of redundant properties and consider their future use as a potential resource/income generator for the parish.
- Establishing a procedure and process for closing parish facilities (churches, presbyteries, halls) to avoid untimely closures, with buildings being left empty and vulnerable.

## Quinquennial Surveys

The practice of having our parish properties inspected was previously linked to the programme of visitation established by particular bishops. This means that there has been some variation in the frequency of such inspections. It is therefore now agreed that these inspections should take place on a regular basis outside of any particular pattern of visitation.

The purpose of the quinquennial survey is to ensure that all property is regularly inspected and reported on, with items needing attention being highlighted as short, medium or longer-term. The surveys can be carried out by any qualified architect or building surveyor but they are asked to report (to the parish and the diocese) using a standard pro-forma report. This gives some consistency of approach and we will be looking in the future to see if there is anything further needed to ensure all such surveys are conducted to the same standard.

As things stand, the current quinquennial pro-forma asks for:

- A brief description of the property being surveyed (including its setting)
- Comments on the External Structure (Walls, Windows, Doors, Pitched Roof, Flat Roofs, Gutters & Downspouts and Condition of Painting)
- Comments on the Internal Structure (Floors, Walls, Ceilings and Decorations)
- Comments on Services (Electrical, Heating & Ventilation)
- Comments on Fittings
- Reference to Asbestos Survey
- Reference to Accessible Facilities
- Comments on External Areas (Paving, Boundary Walls & Fencing and Drainage)
- Recommended Repairs (with estimate of net costs, that is excluding VAT and Fees)
  - Urgently required.
  - Within 18 months
  - Within 5 years
- Any other General Remarks

## Development Plans

The longer-term ambition is for each parish, working with the Parish Support Team, to have a development plan with regard to the maintenance and improvement of its property. In the meantime, applications for approval of capital expenditure should be based on items highlighted in the quinquennial report. Where no recent report exists, obtaining an up to date report should be the first step in considering any property repair or development.



# Statutory Compliance

*Health and Safety Policy, Organisation and Arrangements* (February 2019)

This documentation provides the basis for how we will fulfil our legal duties to clergy, employees, volunteers, parishioners and anyone who visits our churches or properties. This policy is available separately to this *Property Management Handbook*. It includes definitions of the responsibilities of the bishop, trustees and parish clergy.

Health and safety is not a barrier to achieving the mission of the Church and it is our moral responsibility to ensure the safety of one another and those in our pastoral care. Effective implementation of safe working practices also requires time and financial resources to comply with civil regulations. The measures introduced are intended to improve our capacity to protect one another and reduce the risk of injury and resulting prosecutions and liability claims.

To support this implementation, priority areas for compliance have been identified. These are:

1. Completion of **Fire and General Premises Risk Assessments** for all churches, presbyteries (especially those which are also workplaces), parish halls and other premises.
2. Ensuring that **5-year electrical fixed wiring inspections** are up-to-date and in line with current regulations and additional requirements of insurance policies.
3. Completing **'Asbestos Management Surveys'** across all our properties and implementing appropriate action plans.
4. Completing inspections of **gas fuelled equipment, especially heating boilers**.
5. Reviewing the arrangements and providing guidance for the safety of parishioners and visitors to **diocesan and parish events** such as fetes, processions, and pilgrimages.
6. Developing and establishing **Contractor Management Processes**.

In October and November 2019, we ran a number of briefing presentations to outline the additional steps planned for the next three years to support parishes with compliance. We are encouraging parish volunteers to get involved in supporting parish priests with property or safety matters.

We are bringing in house the requirement to implement statutory compliance checks across ALL our properties. This will be further rolled out during 2021, continuing with residential properties and followed up with presbyteries before looking at Churches themselves in 2022. We will manage the selection of contractors to carry out all statutory compliance within all Diocesan controlled buildings and residential premises and we are continuing the roll out Safety Toolbox, an online compliance management portal that will assist the diocese and parishes to record, track and monitor health and safety topics and statutory compliance requirements and certification.

## **Inventories**

Parish priests, on assuming their office, are “required to make an accurate and clear inventory of all ecclesiastical goods owned by the parish” (Canon 1238) and keep track of any changes to this. The Annual Financial Return also requests an updated list of “any items in the Presbytery that belong to the parish and which have a replacement value in excess of £500”, whilst “it is assumed that all such items in the Church belong to the parish” (Schedule X of the Annual Return). Our insurers require us to notify them about certain items of particular value.

Inventories are also of great importance when we are closing a church and items are either being disposed of, distributed to other parishes or put in storage.

Help can be provided (at a cost) for compiling a detailed photographic record of all ecclesiastical goods. Please contact the Diocesan Property Office.

## **Insurance**

Property insurance cover for diocesan and parish properties is organised by Catholic Insurance Service Limited (CIS) and cover is provided by the Catholic National Mutual (CNM). This is coordinated centrally by the diocese and the premiums are paid centrally and then recharged to the parishes (now on a monthly basis).

Details of insurance cover are distributed to the parishes around September/October. When you receive your renewal documentation, please alert the Diocesan Project Manager or Parish Business Partner if there are any parish properties that are not included on the schedule.

If you need to make a claim against the insurance policy, please contact the Diocesan Project Manager or Parish Business Partner for assistance.

## **Listed Buildings**

Special conditions apply when undertaking work on Listed Buildings (or those adjacent to them), so even basic repairs/maintenance should be referred to the Diocesan Property Office to make sure that we comply with all appropriate regulations.

The Bishops’ Conference Patrimony Committee are a source of advice and support in regard to listed buildings and any significant work on these buildings requires a faculty from the regional Historic Churches Committee (on which we have two members).

## **Liturgical Adaptations**

Bishop John recently reminded us that “any structural changes to a church need to be approved by the Liturgy Office, under the chairmanship of Fr James Manock” (Letter to Priests, September 2019, regarding Hope in the Future Stage Three).

# Unoccupied Properties

## Managing unoccupied properties

Buildings which are unoccupied for prolonged periods are at greater risk of damage and of causing harm to people who visit them. Empty buildings can attract vandals and arsonists. They can become unauthorised places of shelter for homeless people who in turn are exposed to risks through lighting small fires or exposure to dangerous substances. They are also more vulnerable to general deterioration and incidents such as burst pipes, particularly during cold or bad weather. **It's particularly important to make sure that unoccupied property is secure and well maintained.** Exactly what that involves will depend on the time the property will be empty and level of risk. Considering this, our insurers restrict the cover they provide under the property insurance policy for 'unoccupied buildings'.

## Definitions

Our insurers define unoccupied buildings as "any building which has not been occupied at least on a regular weekly basis by the Insured and/or their tenants for business or residential purposes for more than 90 days. For the purposes of this definition a building will not be deemed to be occupied where visits to the premises are solely in relation to checking the building."

### Unoccupied Buildings **do not include:**

- a) A Presbytery which is temporarily vacant following the departure of a Priest awaiting the appointment of a new Priest, subject to the building being visited at least once a week by a Parish or Diocesan official.
- b) Schools closed during usual holiday periods;
- c) Buildings undergoing works as part of a JCT contract until practical completion;
- d) Buildings that are adjoining another building owned and occupied by the Insured;
- e) Buildings occupied by a resident caretaker or building guardian.

## Responsibility & Protecting for unoccupied buildings

The responsibility for unoccupied building sits with the parish, however a list of all unoccupied building will be reviewed at the Property Committee on a monthly basis and advice will be given to the parish in relation to the securing of the building etc. Unoccupied properties should be reviewed at a parish and diocesan level to assess the future needs.

To ensure that unoccupied buildings are protected and do not cause a significant risk of harm or deterioration, the Safety Toolbox system provides an online checklist and form which can be downloaded for use. This guidance recommends areas for inspections and provides a system to record visits to buildings which are unoccupied for prolonged periods. Property that is only vacant for short periods should still be visited regularly but a simple diary note of when this occurred would be satisfactory.

## **Areas to consider include:**

### **Regular inspections**

- Inspections should be completed on a routine basis, proportionate to the anticipated risk but, in any case, should be sufficiently frequent to enable you to pick up a problem quickly.
- Records should be kept including who conducted the inspection, when, what was inspected, what was found and what was done about it.
- Before an inspection is completed a risk assessment should be carried out and, where appropriate, personal protective equipment or other arrangements put in place for the safety of the person conducting the assessment.

### **Protecting the perimeter of the buildings**

- Boundary fencing should be checked to make sure it is secure and in good order.
- Combustible materials around the perimeter should be removed. Materials should be stored at least 5 metres away from the building.
- Access may need to be blocked to deter fly tipping while still ensuring that emergency vehicles can gain access.
- Vegetation or overhanging trees may need to be safely cut back.
- External lighting may need to be installed. If it is installed it should be working properly.
- For high-risk unoccupied property, think about seeking advice from, and notifying, the local neighbourhood policing team (crime prevention & community support officers)/fire service/local community groups, etc.

### **Protecting the outside of the buildings**

There may be structural or local authority restrictions (for listed buildings see below) on how you protect the exterior of the building. Traditional methods of boarding up doors and windows with timber board is vulnerable to damage and removal and looks unsightly. Similarly, the prompt removal of graffiti and swift response to vandalism demonstrates that buildings are closely monitored.

- External doors to the property should be secured with a minimum of a mortice lever deadlock, but you may need to consider fitting proprietary locking steel screens or brick or blockwork depending on the level of risk.
- Windows - Ground floor windows and other easily accessible windows should be locked shut. Depending on the level of risk, you may need to fit perforated steel screens or brick/blockwork depending on the level of risk.
- Other openings that could provide access e.g. ventilation ducts, delivery shutters should be secured.
- Keep track of who has keys to external doors. If you can't account for all the keys, change the locks.
- Seal up letterboxes or install a safety letterbox (fully enclosed box or externally mounted letterbox). Accumulating mail is an easy source of fuel for an arsonist and advertises that the building isn't regularly visited.

If you require further information or are unsure, please contact the Property Team or our insurers.

### **Protecting the inside of the building**

- Remove or minimise items which burn easily such as paper, textiles, upholstered furniture and rubbish. Any remaining items should be stored to minimise the risk of fire.
- Remove or minimise dangerous substances such as flammable liquids, portable gas canisters and harmful chemical products. Any remaining items should be stored securely and to minimise the risk of fire and spills.
- Remove valuable items noting that some unfixed valuable items (not fixtures and fittings) may require formal consent to remove.
- Keep internal doors shut and secure doors to areas such as plant rooms, basements and roofs. This needs to be carefully balanced between containing the risk of fire spread while achieving sufficient ventilation inside the building to prevent the spread of mould, rot or other decay problems.

### **Utilities and Services**

Utilities, other than those required for fire and security protection should be disconnected in such a way that re-connection is not easy.

Water tanks, pipes and associated equipment, other than those specifically required for fire-fighting purposes, should be isolated and drained down.

Fire mains, sprinkler systems, intruder and fire alarms and any other electrical or electronic security system should continue to be maintained in accordance with the manufacturer/installer's recommendations, statutory requirements and/or your risk assessment.

### **Alarm systems**

If a fire or intruder alarm system is already installed then you should consider keeping it operational, particularly if the system is linked to a remote alarm receiving centre. Alarm systems which rely on local sounders are of limited value when the building is unoccupied, and you may need to consider upgrading this to a monitored system.

### **CCTV**

As a general surveillance tool and to provide a low-level deterrent, CCTV is a useful solution. However, it is easy to overcome if the system isn't continually monitored.

### **Security patrols**

Larger buildings and buildings at special risk e.g. located in a high crime area, may require a manned security presence. Security guards should be properly trained and, as a minimum, approved under SIA (Security Industry Authority). Membership of NSI (National Security Inspectorate) should also be considered as a preferred selection criteria.

If you consider that this is appropriate, please contact the Property Office for the approved list.

## **Fire Risk Assessment**

If the unoccupied property is non-domestic or a domestic property which includes common areas such as a mixed-use presbytery, flats with common parts or a House of Multiple Occupancy, there should already be a fire risk assessment for the property when it was occupied. If the property is to be empty for some time, the fire risk assessment should be reviewed in the light of it being unoccupied.

## **Scope of insurance cover**

Property insurance cover for Diocesan and parish properties is organised by Catholic Insurance Services Limited (CIS) and cover is provided by the Catholic National Mutual (CNM).

If a building is designated as an unoccupied building cover will automatically be restricted to “standard” cover. This is for the cost of demolition and debris removal only and where loss or damage arises only out of fire, lightning, aircraft or explosion.

If the Diocese or Parish believe that the building is in a good enough condition that it should qualify for wider cover then CIS/CNM should be contacted in the first instance. CNM will then arrange for a survey to be undertaken by Sedgwick Ltd (“Sedgwick”). They will determine if the building is suitable for wider cover to apply. If wider cover does apply the cover will be increased to the “wider” cover of indemnity for all risks subject to a £1 million limit and a £500 excess.

In the event that the Sedgwick findings support the wider cover being offered then CNM will pay for the survey. In the event that the cover is not deemed suitable for the wider cover then the cost of the survey will fall to the Diocese or Parish.

In all instances, Sedgwick’s survey is likely to identify risk improvement measures to CNM. Where this is the case, CNM will require that the Diocese or Parish implement these improvements within a set timeframe before wider cover becomes effective.

Detailed information on the new cover provided and associated warranties are summarised in the specific policy or available from the Property Team. However, it is likely to include:

1. Water systems are drained down and services are switched off.
2. Weekly visits and internal inspections be conducted with any damage repaired immediately (e.g. broken windows).
3. Removal of combustible materials and no storage within 5 metres of the building.
4. Remove all valuables from the Building.
5. Mortice lever deadlocks to be fitted on external doors and locks on ground floor windows.
6. Implementation of any VRS survey requirements.

## **Long term wider cover**

Sedgwick will resurvey each building with wider cover every 3 years to verify that the condition remains appropriate for the wider cover to continue. CNM will only fund the cost of the survey in the event that the wider cover remains appropriate for that building. As such CNM will check first with the Diocese/Parish that they still believe that the building should

qualify for the wider cover otherwise the cost of the survey will be passed to the Diocese/Parish.

### **High Value / Listed Buildings**

Buildings of a listed nature are required to be reinstated and therefore demolition and debris removal cover will not satisfy the insurance obligations placed on the Diocesan Trustees. Our insurers recommend in this instance the use of resident caretakers or property guardians. The building is not then considered to be unoccupied and remains fully covered. Any buildings falling into this category should be notified to CNM as CNM may still wish to undertake a survey at its own expense in order to establish the condition of the building.

National guidance is available on managing vacant historic buildings from the link below which includes helpful checklists and risk assessments.

<https://historicengland.org.uk/advice/technical-advice/buildings/managing-vacant-historic-buildings/>

The ongoing maintenance and repair of unoccupied historic buildings is of particular importance, particularly in taking prompt action where there appears to be signs of water ingress. Local authorities have a range of statutory enforcement powers at their disposal where land and property (especially historic and listed properties) are not adequately maintained.

The photographing, recording and cataloguing of important or valuable interior features such as chimneypieces, joinery and other fittings are also particularly useful.

# Notes for Consultants

## Capital Project Procurement Process

**Note:** *This guidance applies to all parishes and for all capital projects requiring consultant appointment. The use of consultants on projects should only be where we do not have the necessary skills internally to deal with the project, that is, for large schemes of work.*

### Capital Project Briefing

1. When provisional allocations have been agreed with Diocesan Property Committee, briefing forms will be issued to the parish and consultants, identifying the anticipated project along with the anticipated cash profile.
2. Consultants should immediately enter into a professional agreement with the Diocesan Trustees providing a schedule of services and a fee quote to both the parish and the trustees for agreement.
3. For Larger Schemes of work and **with prior approval from the Property Committee** at the time of briefing it should be noted that all funding is provisional and as such it is expected that the consultant will work up the project to RIBA work stage C and submit an estimate stage application to the Diocese on Form P1 complete with all supporting drawings and estimates. The work to this stage will be 'at risk' pending formal approval from the Diocesan Property Committee, after which the project may proceed to Tender.
4. Please note that Capital Allocations are based on fixed funding arrangements and consultants should at all times design **within** the allocation and should not expect that further funding will be forthcoming should project costs exceed the allocation.

### Estimate Approval

5. Estimate stage submissions (Form P1) along with relevant drawings and compliant cost information must be received in a timely fashion by the Property Committee. From January 2021 the property committee will meet on a monthly basis.

### Tender Approval

6. Tender stage submissions (Form P2) along with supporting documentation and detailed fee breakdowns for **ALL** projects should be forwarded to the Diocesan Property Committee.
7. Where tender costs are within original allocations, submissions should reflect this.
8. Upon receipt of the P2 Form the Diocesan Property Committee will consider the proposal and once approved, the project will move onto the next stage.

### Contract Conditions



9. Contract conditions must be amended to state “**Payment to be made within 28 days of the date of the Certificate**”. This will ensure funds are available, without which, there will be insufficient funds for the Diocese to pay the Contractor on the parishes’ behalf.

### **Fee Claims**

10. Upon receipt of Estimate Stage Approval the consultant may submit fees up to a maximum of 7.5% of the gross costs of the project.

### 11. Stage Payments

- Estimate Stage	Form P1	30% on receipt of Approval
- Tender Stage	Form P2	60% on receipt of Approval
- Stage Payments to Practical Completion		95%
- Final Cost Stage	Form P4	100%

Claims for payment of planning, building control, asbestos surveys, insurance etc should be forwarded to the Property Team Lead and Consultant in accordance with the table above. All claims to be contained within the stage payment percentages shown above.

### **Project Monitoring**

12. Any variations to the project **MUST BE NOTIFIED IN ADVANCE** on the Form P3.
13. Should it become apparent that problems with project dates or costs are likely to occur; the consultant should inform the Property Team Lead or the Project Manager as appropriate and who will then where relevant submit an application (Form P3), this will then be considered by the Diocesan Property Committee and action taken accordingly. It is important to note that there will not be an automatic increase in budget, and some value engineering may be needed in order to complete the project and ideas should be included on the P3 together with any ramifications of changing the brief of the project.
14. Once Practical Completion is achieved a copy of the Practical Completion Certificate **MUST** be sent to the Property Office.

### **Final Claims**

15. It is essential that final claims are dealt with in a timely fashion. Final Cost Form P4 should accompany all claims for final payment and receipted invoices should also be submitted along with the final invoices for construction costs and fees.
16. Payments will be made once all appropriate paperwork has been received. Receipted invoices should be returned to the Property Department without delay in order to facilitate final cost submission.

**Note: All Diocesan Forms require the signature of the Parish Priest to ensure their agreement to the proposals and use of funding that they control. Any submissions inappropriately completed or incomplete will be returned to the consultant for rectification.**

*For assistance with any property matters, please contact:*

Diocesan Estates and Facilities Management  
Cathedral Centre, 3 Ford Street, Salford M3 6DL  
0161 817 2222 (Option 2)  
[property@dioceseofsalford.org.uk](mailto:property@dioceseofsalford.org.uk)

*For assistance with any Health and Safety or compliance issues, please contact:*

Health and Safety Coordinator  
Cathedral Centre, 3 Ford Street, Salford M3 6DL  
0161 817 2216  
[safety@dioceseofsalford.org.uk](mailto:safety@dioceseofsalford.org.uk)

*For assistance with any Finance support, please contact:*

Parish Business Partner  
Cathedral Centre, 3 Ford Street, Salford M3 6DL  
0161 817 2216  
[parishfinance@dioceseofsalford.org.uk](mailto:parishfinance@dioceseofsalford.org.uk)

*For assistance with any Project Management or Grant/Bid writing support, please contact:*

Diocesan Project Manager  
Cathedral Centre, 3 Ford Street, Salford M3 6DL  
0161 817 2216  
[lisa.heywood@dioceseofsalford.org.uk](mailto:lisa.heywood@dioceseofsalford.org.uk)