



Scottish Episcopal Church

General Synod of the Scottish Episcopal Church

Scottish Charity No SC015962

Provincial financial support for works to rectories (and other church housing)

Building Grants Fund, Rectory Green Fund and Building Loans Fund Application Form

(Please read **Guidance Notes** (BGR/2) before completing)

Please consult with your Diocese before undertaking any works that are likely to require Provincial financial assistance.

If any aspect of the works relates to heating, insulation, energy efficiency etc please ensure that a member of the Provincial Net Zero Team has been consulted and has endorsed the application as part of the Diocesan approval process.

Once reviewed and authorised by Diocese the completed application, supporting documentation and Diocesan Letter of Support should be submitted to the General Synod Office:

Malcolm Bett treasurer@scotland.anglican.org
Vicki Anderson VickiA@scotland.anglican.org

A APPLICANT DETAILS AND SUMMARY OF REQUESTED PROVINCIAL FUNDING

Charge(s)			
(linked with)			
Diocese			
We hereby apply for a grant from the Building Grants Fund of up to	£		
We hereby apply for a grant from the Rectory Green Fund of up to	£		
We hereby apply for a loan from the Building Loans Fund of up to	£		
Status of Works	Not yet started	/ Started	/ Completed
Rector / Priest in Charge	Signature		
	Print Name		
Secretary / Treasurer	Signature		
	Print Name		
Date			

B PRINCIPAL CONTACT FOR FURTHER ENQUIRIES REGARDING THE APPLICATION

Name	
Position	
Email address	
Contact telephone number	

C NET ZERO ENDORSEMENT**For works without any Net Zero potential**

(To be completed by member of Provincial NZ Team)

I confirm that I have reviewed the summary of works provided at Q7 and that no significant net zero potential has been identified.

Signature

Print Name

Date

For all other works**Diocesan Net Zero review and endorsement**

(To be completed by member of Provincial NZ Team allocated to assist charge in scoping project and identifying funding sources)

I confirm that:

- | | | |
|---|-----|------|
| 1. I have worked with the charge in developing the scope of the project | Yes | / No |
| 2. The project is consistent with the relevant provincial guidance and best practice for such works | Yes | / No |
| 3. Successful completion of the project should result in reduction in energy usage / smaller carbon footprint | Yes | / No |
| 4. Relevant government (and other) grant funding sources have been identified and applications submitted | Yes | / No |
| 5. Undertaking the works is consistent with the principles of the Net Zero Action Plan (2023-2030) and will help achieve its desired outcomes | Yes | / No |

Any comment by member of Provincial NZ Team

Signature

Print Name

Date

Provincial Net Zero review and endorsement

(To be completed by Net Zero Delivery Director)

I confirm that I have reviewed the application and agree with the Diocesan NZ review and endorsement noted above.

Yes / No

Any comment by Net Zero Delivery Director

Signature

Print Name

Date

D DIOCESAN REVIEW

To be completed by Diocese following its review and submitted with Diocesan Letter of Support.

(Ensure one box ticked for each statement. Incomplete applications subject to rejection without consideration.)

This application has been reviewed by the appropriate Diocesan Board or Committee which:

- | | | | |
|---|-----|------|------|
| 1. Confirms that it is satisfied that necessary Quinquennial Inspection reports have been undertaken and that necessary works detailed in the reports have been completed, programmed or are the subject of this Application. | Yes | / No | |
| 2. Confirms that it has reviewed the supporting information detailed at the check list (see end of application form) and that all necessary information is being forwarded to the General Synod Office. | Yes | / No | |
| 3. Supports the application for a grant of up to £_____ from the Building Grants Fund. | Yes | / No | / NA |
| 4. Supports the application for a grant of up to £_____ from the Rectory Green Fund. | Yes | / No | / NA |
| 5. Agrees to provide a diocesan grant of £_____ (equivalent to the grant requested from the provincial Rectory Green Fund). | Yes | / No | / NA |
| 6. Supports the application for a loan of up to £_____ from the Building Loans Fund. | Yes | / No | / NA |
| 7. Agrees to accept responsibility for monitoring the loan and arranging payment in the event of default. | Yes | / No | / NA |
| 8. Confirms that it has considered the financial resources available to the congregation, its stewardship and fundraising strategies and has specifically addressed these issues in its attached Letter of Support. | Yes | / No | |
| 9. Confirms that concerns raised during the diocesan review of the application and the way in which they have been addressed are detailed in the Letter of Support. | Yes | / No | |

E DIOCESAN AUTHORISATION	
Bishop / Dean	Signature _____ Print Name _____
Convener / Secretary Diocesan Board/ Committee (as appropriate)	Signature _____ Print Name _____
Received General Synod Office	Date: _____

1. RECTORY DETAILS	
Address	
Listing	Grade A / Grade B / Grade C / NA
Conservation area	Yes / No
Year built (if known)	
Architect (if known)	
Year purchased	
<i>Please provide general photos of building (photos can be submitted electronically)</i>	

2. RECTORY OCCUPATION	
Is rectory currently occupied	Yes / No
If Yes , please provide details of occupant. If occupant not a stipendiary priest please provide information regarding nature of occupancy agreement.	

If **No** please provide details of planned use of property

3. COMPLIANCE WITH MINIMUM GUIDELINES

Details can be found at:

<https://www.scotland.anglican.org/vestry-resources/appointments-and-employment/minimum-standards-for-clergy-housing/>

Does rectory fully comply with current minimum guidelines?

Yes / No

If **No** please provide details of areas of non compliance, any plans to address non-compliance and reasons for retaining property.

4. ENERGY PERFORMANCE CERTIFICATE

(See guidance at

<https://www.scotland.anglican.org/vestry-resources/buildings/energy-performance-certificates-for-existing-buildings/>)

The Minimum Standards for Clergy Housing state that “The property should have an Energy Performance Certificate (EPC) rating of at least C” and “Should the rating be lower than C then the vestry should consider taking remedial action or offering an appropriate heating allowance.”

Applications will only be considered if an Energy Performance Certificate is provided.

EPC rating (please attach EPC)

A / B / C / D / E / F / G

If rating D or worse please provide explanation why the property is being retained

Are works subject of application designed to improve EPC rating?

Yes / No

If **Yes** are the works consistent with those recommended on EPC?

Yes / No

If **No**, please provide explanation for differences

5. QUINQUENNIAL INSPECTIONS

Date of last Quinquennial Inspection

Please provide copy of Quinquennial Inspection report with application

If Quinquennial Inspection is overdue please provide explanation

Are all church owned buildings covered by the Quinquennial Inspection?

Yes / No

If **No** please provide details of excluded properties and reasons for their exclusion.

6. 'NET ZERO' WORKS

Does any aspect of the proposed works relate to energy efficiency measures or other 'net-zero' type works designed to reduce the property's carbon footprint?

Yes / No

If **Yes** please:

- Ensure that a member of the Provincial Net Zero Team has been consulted
- Attach copies of all relevant energy audits / advice etc. that demonstrate how the proposed works will reduce the property's carbon footprint

7. SUMMARY OF WORKS

Please provide a summary of the works to be carried out.

If these form part of a larger scheme in several phases, the whole should be described.

Please provide photos, sketches, drawings, and description of works where appropriate, to assist in the understanding of the proposed works.

8. SUPERVISION OF THE WORKS

Please read the guidance note **Maintenance and Building Work for your Church – Some Practical Considerations** produced by the Provincial Buildings Committee (www.scotland.anglican.org/vestry-resources/buildings/maintenance-and-building-work-for-your-church-some-practical-considerations)

Please provide details of the professionals (architect / surveyor etc) responsible for overseeing the works and how responsibilities under the Construction (Design and Management) Regulations (CDM) will be addressed. (Further information available on the Health and Safety Executive website: www.hse.gov.uk/pubns/indg411.pdf)

9. COSTS

Please attach detailed costings and estimates of proposed works and complete summary below.

	<u>Estimate One</u>	<u>Estimate Three</u>	<u>Estimate Three</u>
Name of Contractor	_____	_____	_____
Project Costs (excluding fees)	_____	_____	_____
Professional fees	_____	_____	_____
VAT (see note below re LPW scheme)	_____	_____	_____
Total Costs	_____	_____	_____
Which estimate do you propose to accept	Estimate One	/ Estimate Two	/ Estimate Three

Please provide explanation If less than three estimates were obtained.

10. PROPOSED FUNDING

a) Own resources (including use of reserves and fundraising (detail))

£

_____	_____
_____	_____
_____	_____
_____	_____

Total own resources

b) Diocesan grants and loans

_____	_____
_____	_____

Total Diocesan funding

c) Other grants and loans awarded

Source	_____	_____
Source	_____	_____
Source	_____	_____
Source	_____	_____

Total other approved funding

d) Other grants and loans anticipated

Source	_____	_____
Source	_____	_____
Source	_____	_____
Source	_____	_____

Total other anticipated funding

e) General Synod funding requested (as section A)

Building Grants Fund	_____
Rectory Green Fund	_____
Building Loans Fund	_____

Total General Synod funding

Total Funding (To agree with total costs at section 9)

11. FUNDRAISING AND STEWARDSHIP

Please provide information regarding the congregation's approach to fundraising and stewardship in general and the fundraising specifically related to the proposed works. (Include details of any grant applications rejected.)

12. IMPACT OF REJECTED APPLICATION

If the requested provincial grant and / or loan is not awarded what will be the impact on the proposed works?

13. CONGREGATIONAL RESOURCES

a) Attendance and Income figures for the last three financial years (most recent year first)

Year	Average Sunday Attendance	Giving	investment	Endowment	Other (excl. grants)	Total
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Priest: _____

Full time Part-time Stipendiary / Non-stipendiary ?

b) Investments held (totals only) (excluding bank balances and deposits)

Book Value
(if known) Market Value

Name of Investment _____

Name of Investment _____

c) Bank balances and deposits held

Bank Name/Account

Bank Name/Account

d) Give further details of any designated or restricted funds included in b) and c)

Name of fund

Name of fund _____

Name of fund

Name of fund

Name of fund

e) Any other significant liabilities or commitments (e.g. existing loans

To be provided by Charge to Diocese (and submitted with application to General Synod Office)

- 1 Quinquennial Inspection report
- 2 Annual Accounts for last two years
- 3 Architect's/Surveyor's report on works
- 4 Energy Performance Certificate
- 5 Detailed summary of costings of proposed works
- 6 Estimates/invoices
- 7 Energy audits and any advice on energy reduction measures etc
- 8 Photos of the property

To be provided by Diocese when submitting application to General Synod Office

- 1 Letter of Support (see Guidance Notes for further information)

Information should be submitted electronically.

Any information not specifically listed above that is considered relevant to the application should be submitted.