BGR/1

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:

James Lloyd cfo@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		£5,000 (£2,500 if Diocese cannot match-fund)
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

I have worked with the vestry and clergy to develop and determine the scope of this project. The proposed installation of solar panels and insulation work will raise the current EPC from D to an expected C which is in line with Provincial standards for clergy acommodation. I am pleased that the project has progressed to this point and the funds being committed by the Province and Diocese will support the efforts of the wider Net Zero programme in improving clergy housing and reducing emissions.

Signature

Print Name Jack Nevin

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

I concur with the above comment on the project development and am confident that such funds committed will raise the EPC of the property to meet the Provincial standard, while also reducing emissions and improving the quality of clergy housing.

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 ☐ / N/A ☐
4. Supports the application for a grant of up to £ from the Rectory Green Fund.	Yes ☐ / No ☐ / N/A ☐
5. Agrees to provide a diocesan grant of £5,000 (equivalent to the grant requested from the provincial Rectory Green Fund).	Yes ☒ / No ☐ / N/A ☐
6. Supports the application for a loan of up to £ from the Building Loans Fund.	Yes ☐ / No ☐ / N/A ☐
7. Agrees to accept responsibility for monitoring the loan and arranging payment in the event of default.	Yes ☐ / No ☐ / N/A ☐
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

Please provide general photos of building (photos can be submitted electronically)

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.

EPC does not meet minimum guidelines of C. These works should, according to EPC document, raise EPC to C which will satisfy provincial standards.

4. ENERGY PERFORMANCE CERTIFCATE

(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

Property is being retained due to association with church and nature of property market in area. Property satisfies other minimum guidelines and it is thought that remedial works to improve EPC would be more cost effective and appropriate than replacement of property.

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 2023
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.

Installation of loft, cavity-wall and underfloor insulation. Installation of solar panels and battery system. Replacement of one window with double-glazing.

Who will be responsible for overseeing / supervising the works?
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)

Vestry (Property Convenor / Treasurer)

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.

	Estimate One	Estimate Two	Estimate Three
Name of Contractor	Local Contractor	Regional Contractor	
Project Costs (excluding fees)	£9,200	£11,000	
Professional fees	£800	£900	
VAT (see note below re LPW scheme)			
Total Costs	£10,000	£11,900	£0
Which estimate do you propose to accept	Estimate One ☒	Estimate Two ☐	Estimate Three ☐

Please provide explanation If less than three estimates were obtained.

Due to the difficult nature of obtaining quotes in this area, we did not obtain three quotes. Further, due to an existing relationship with a local contractor, and in support of the principles of Community Wealth Building, we are satisfied with working with this local agent.

10. PROPOSED FUNDING

a) Own resources (including use of reserves and fundraising (detail)		£
General Funds		£1,250
	Total own resources	£1,250
b) Diocesan grants and loans		
RGF Match Fund		£5,000
	Total Diocesan funding	£5,000
c) Other grants and loans awarded		
Source		
Source		
Source		
Source		
	Total other approved funding	£0
d) Other grants and loans anticipated		
Source		
Source		
Source		
Source		
	Total other anticipated funding	£0
e) General Synod funding requested (as section A)		
Building Grants Fund		
Rectory Green Fund		5000
Building Loans Fund		
	Total General Synod funding	£0
Total Funding (To agree with total costs at section 9)		£11,250

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.)

We have a generous congregation, despite not being the largest. We receive regular contributions and hold fundraisers throughout the year. Much of these funds raised go to supporting our ministry in the community, and fund our rector. We are conscientious of the use of the funds donated to us, and are committing some of our own funds to any possible overruns.

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?

We as a charge are committing £1,250 (up to £2,500) for any overage costs, however we could not possibly support the full cost of these works. If we do not receive these funds, we would not be able to move forward with these works which would leave the rectory in breach of provincial standards. We expect to be in vacancy within a few years and not having improved the rectory in this way may impact our future recruitment process. Further, we seek to generate energy locally using solar, thus furthering our sustainable ambitions - not moving forward with this project would hamper this goal.

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
						£0
						£0
						£0

Priest: Rev

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		
Name of Investment		

c) Bank balances and deposits held

Bank Name/Account

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)

CHECKLIST – INFORMATION TO BE PROVIDED WITH THE APPLICATION

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.