Guidelines and Procedures

Guidelines and procedures for circuits embarking upon BUILDING, DEMOLISHING, REBUILDING, ENLARGING, ALTERING or REPAIRING Trust Property.

Where to start?

Document clearly your accommodation requirements or expected extent of the works. This should include approximate dimensions, and the performance requirements you hope to achieve through your project.

Have a clear objective and agreement as to what you hope to gain through these works.

Having discussed and agreed the extent of your project – now the hard bit! How much money do you want to spend? What is your maximum budget? You need to be thinking that if you have a shortfall, can you fundraise, run gift days, is there external funding available etc.? Essentially could you pay for it? If you need to explore borrowing – can you pay it off over 5 to 10 years if needs be?

Property Board policy requires that 66% of the cost is in hand (excluding loans) before approval can be given. Also, if a 10% variance arises in the cost of any project permission for the additional expenditure must be obtained.

You also need to consider if the expense will put a burden on the running accounts of the Society and Circuit.

The next step is to seek approval in principle to explore the possibility of taking this idea further. This will require completing........

**PB 03 Section A – Permission in Principle.**

This form will require Circuit Executive approval, District Superintendent approval and ultimately Property Board approval at various stages.

Once approved you are now up and running. You should get preliminary advice on the likely cost of your optimum scheme. Remembering to include possible bank interest on overdraft facilities, as well as VAT, Application Fees and Professional Fees. If the preliminary advice suggests that the expense and nature of work is along the lines of what you have discussed and agreed earlier, you should be considering approaching a designer or professional to take the scheme further.

It is worth noting that you have arrived at a stage where costs will be involved for fees and/or statutory applications etc.
Form PB 03 - Guidance

You should now be looking towards........

**PB 03 Section B – Interim Scheme Approval** to have a clear understanding as to the extent and nature of information needed. At this stage of the process, you will need to provide more detail of your proposal.

This would include **conceptual drawings**, **outline specifications**, **estimated costs** and an outline of how you intend to **finance the scheme**. This information should enable identifying any concerns or design issues which may have **Safeguarding** or **Health & Safety** issues at this early stage.

So many questions will flood in such as; **Do we need Planning Approval? Building Control Approval? Our Building is Listed/Protected is this a problem?**

This is why you bring in the professionals! *(see notes on commissioning a design team)*

You will also need to complete the **Project Financial Appraisal Form (PB 03A)** which should include items such as **money held**, a brief outline as to **how outstanding funds (if any) will be raised** such as pledges/bequests/fundraising etc. Pro-forma will be made available to you to help structure your proposal and outline your expenditure and payment options.

It would also be a requirement to indicate at this stage if you **might need** to make a **Grant or Loan** application to supplement the scheme costs.

If your building does have Listed/Protected Status, you need to **identify any restrictions** that might be applied from an historic/protected building point of view.

If you find that your building is ‘protected’, use this opportunity to exhaust any **potential external funding grants** that you might qualify for due to your protected status. E.g. *(Listed Places of Worship Grant Scheme)*. [www.lpwscheme.org.uk](http://www.lpwscheme.org.uk) *(Note: This is a UK scheme)*

What do your Deeds/Lease say?

Your **Deeds** may contain certain restrictions or covenants which may **impact on your proposals**.

It would be prudent at this stage to check that these do not apply, but if they do, determine if the scheme is **still viable**, or, make the necessary changes at this early design stage.

Once you have collated all this information you are now able to complete the second stage of the form **PB 03 Section B – Interim Scheme Approval**. Again, this section will require **Circuit Executive** approval, **District Superintendent** approval and ultimately **Property Board** approval.

**You should not proceed to the next stage until you have Section A & B approved.** **Section C** can be costly so this is a way to protect your costs should approval not be granted or to facilitate scheme amendments identified by the Property Board.
Welcome to the business end of this process and form!

**Section C – Final Scheme Approval** is your opportunity to demonstrate that all Statutory Approvals have been received, for example the Sketch Design drawings – ‘Section B’ (suitable for Planning Permission) have been upgraded to **Full Production Drawings – Specifications**, and have been approved *(where applicable)* by Building Control.

**Full Production Drawings** and **Specifications** are not only used to obtain Building Control approval, they also form the documents that are used as production or ‘working’ drawings. These documents are also used for both **Tendering** and for the **builder/contractor** to work from.

**Tendering** is the process of market testing your scheme to ensure value for money and to secure an appropriate contractor to do the work.

It should also be identified that if Planning permission or Building control was not needed – you have the facility to advise as to why not.

You will now have the opportunity to **revisit** the ‘estimated’ costs in your **Project Financial Appraisal Form (PB 03A)**. You should review your intended funding sources/commitments and **resubmit a more definitive cost proposal**, on the supplied pro-forma.

It may feel you are duplicating here from **STAGE B**, however, it is an opportunity to **re-evaluate the scale of your project**, and either demonstrate your willingness and Circuit Agreement to **continue** or, a **chance to re-evaluate** before applying for **Full Scheme Approval**.

This stage effectively finalises your project and will be the last stage of seeking approval for the scheme.

As with the previous stages, this section of the form will require **Circuit Executive** approval, **District Superintendent** approval and ultimately **Property Board** approval.