

THE CHURCH OF SCOTLAND GENERAL TRUSTEES

GUIDELINES for CONGREGATIONAL PROPERTY CONVENERs

for

CONTROL OVER WORK AT BUILDINGS

In 1998 the General Assembly passed new Regulations setting up a system of controls over work by Congregations at their buildings. Such a system is required for several reasons:

1. Many of our buildings, particularly churches, are some of the finest in the country. In addition to forming a significant part of the Church of Scotland's spiritual and financial assets, the buildings also form part of our national heritage. As such, it is right and proper that work at buildings is regulated.
2. Following on from that, the Church of Scotland enjoys exemption from the requirement to obtain consent for alterations to Listed Buildings which are in use. The exemption exists only because the Church has in place an adequate system of control.
3. As a result of the Church's history and the trend of declining membership there are too many buildings. An adequate system must be in place to prevent large sums of money being spent on buildings which may become redundant in the short to medium term.

Over the past few years the previous system received justifiable criticism that it was confusing and it was difficult to understand particularly for Congregations' officebearers. It is hoped that the new system will be easier both to understand and to operate.

These guidelines are designed to help you, as your Congregation's Property Convener –

- understand the unavoidably technical provisions of the Regulations which are printed as Appendix I.
- know where to get informal advice and guidance – for free!
- identify the situations where you need approval.
- identify which of the various Forms you must use.
- know where, and how, to apply for financial assistance.

SOME PRELIMINARY POINTS

- the basic “rule of thumb” is that **all work at buildings requires some form of approval** although, inevitably, there are exceptions. If you are thinking about carrying out work at any of your Congregation’s buildings, whether repairs or alterations, you should check with your Presbytery Property Convener or Presbytery Clerk to see if you need formal Presbytery approval. **Your Presbytery is the most important body under the new system – work which requires approval must not go ahead unless Presbytery agrees.** All requests for approval to carry out work and to make applications for financial assistance must be made **to the Presbytery** – not directly to the General Trustees or to Historic Scotland.
 - if you propose to carry out alterations particularly to your Church or to any buildings adjacent to your Church, then you should contact the Committee on Church Art and Architecture **for informal advice before** plans have been prepared or proposals have become finalised. The Committee members have vast practical experience and a wealth of technical expertise which is available, free of charge. As this Committee will be consulted by the General Trustees at a later stage in the formal process, early input from the Committee is likely to let matters progress smoothly. The contact in the Church Offices is Ms Anna Reid, 121 George Street, Edinburgh, EH2 4YN (0131 225 5722, ext 2359).
 - the responsibility for financing work on your buildings rests squarely on your Congregation’s Financial Board. If you or your Financial Board want advice about the funding for a particular project, the General Trustees should be contacted at an early stage. They will be happy to give advice on possible financial help and/or appoint representatives to discuss particular aspects which may be causing difficulty. The main source of funding within the Church of Scotland is the Central Fabric Fund which is administered by the General Trustees. An application form as well as information about other funding sources can be obtained from Mr Brian Waller, Assistant Secretary – Ecclesiastical Buildings, General Trustees Department, 121 George Street, Edinburgh, (0131 225 5722, ext 2270).
 - the General Trustees have appointed Energy, Lighting and Sound Consultants who can give independent, unbiased specialist advice for very reasonable fees. For further information, contact the General Trustees’ Secretary’s Department.
- Reg 4 (b)
- the Regulations apply whether or not title to the building concerned is vested solely in local trustees, or in local trustees under Assembly control or in the General Trustees.
 - you should consider whether the work which you are proposing to carry out requires the appointment of a professional advisor such as a Surveyor and/or Architect. There will be situations where the General Trustees and/or other agencies such as Historic Scotland will insist on such an appointment.

SO WHAT DO I DO NOW?

I am thinking about carrying out work at one of my Congregation's buildings. What do I do?

- consider the preliminary points on the previous page.
- Reg 1 (b)
- identify if the work is a **repair** or an **alteration**. In most cases the distinction will be obvious. For example, fixing the leak in your Church roof using similar slates is a repair. Re-roofing your Church with a different type or colour of slate is an alteration.
- Reg 2 (b)
- in the case of **repairs** your Presbytery has power to set, by way of a Resolution, an amount as a threshold below which it does not have to approve the carrying out of the work. **Check** to see if the cost of your repairs is above or below this amount. In these Guidelines the amount is referred to as the "Resolution Limit".
- Reg 1 (b) (v)
and
Appendix II
- identify if the work (whether repair or alteration) at the particular building invokes the Financial Limit which is currently **£50,000**. This will happen in **one** of three ways:
 - either** the cost of the present work exceeds £50,000,
 - or** the cost of the present work PLUS the cost of the work at the same building **which has been authorised by Presbytery** in the past three years exceeds £50,000,
 - or** the cost of the present work PLUS the cost of work at the same building which you are likely to have to carry out in the next three years exceeds £50,000.

There are three points you should remember:

- the cost of the work will include professional fees and VAT where appropriate.
- if your buildings are on separate sites, then each will have its own Financial Limit. Where a complex of buildings includes a combination of Church, Hall or Manse, then one Financial Limit will apply to the complex.
- if the Financial Limit is invoked then you will **always** require the approval of the Presbytery and the General Trustees who themselves have to obtain the views of the Presbytery Planning Task Group.

*I have to carry out repairs at one of my Congregation's buildings. The cost does **not** exceed my Presbytery's "Resolution Limit". The work does not invoke the Financial Limit and I am not looking for financial assistance from the Central Fabric Fund or Historic Scotland. What do I do now?*

- Presbytery approval is not required.
- the matter is one entirely for your Congregation's Financial Board.

- as the work has not been authorised by Presbytery it will not be taken into account when calculating if the Financial Limit is invoked.

I have to carry out repairs at one of my Congregation's buildings and I know that I need Presbytery approval because the cost is over my Presbytery's "Resolution Limit". The work does not invoke the Financial Limit and I am not looking for financial assistance from the Central Fabric Fund or Historic Scotland. What do I do now?

- Reg 2 (a)
- as General Trustees' approval is not required the matter is simply between you and Presbytery.

- Reg 2 (c)
- submit the relevant information to your Presbytery Clerk or Property Convener so that it can be dealt with at the next meeting of Presbytery or appropriate Presbytery Committee.

I want to carry out an alteration to one of my Congregation's buildings. I note that I need approval from both Presbytery and the General Trustees. The Financial Limit is not invoked and I am not looking for financial assistance from the Central Fabric Fund or Historic Scotland. What do I do now?

- Reg 2 (a)
2 (c)
3 (b)
- complete the General Form (A) and submit this to your Presbytery Clerk or Property Convener along with the relevant information – plans, sketches, photographs, estimates, feasibility studies, etc. If approved, the Clerk will complete the Presbytery sections of the form and send it along with the supporting documents to the General Trustees. The Trustees will consider the papers taking into account the opinion of the Committee on Church Art and Architecture

The work that I want to carry out invokes the Financial Limit for the particular building but my Congregation has sufficient funds locally to meet the cost. What happens now?

- Reg 2 (a)
3 (a)
3 (c)
- you need approval from the Presbytery and also from the General Trustees who must take into account the views of the Presbytery Planning Task Group.

- Reg 3 (b)
- if the work is an alteration to your Church exterior or sanctuary, or to a building – eg your Manse – beside the Church, the Trustees will have to take into account the opinion of the Committee on Church Art and Architecture.

- Appendix II
Reg 2 (e)
- you will need to complete the General Form (A) and the Financial Limit Form (B) before submitting them together with the supporting documents to Presbytery. If approved, the Clerk will complete the Presbytery sections of the Forms before sending them to the General Trustees.

The work which I want to carry out invokes the Financial Limit and I want to apply for financial assistance from the Central Fabric Fund. What do I do?

- Reg 2 (a)
3 (a)
3 (c)
- you need approval from the Presbytery and also from the General Trustees who must take into account the views of the Presbytery Planning Task Group.

- Reg 3 (b)
- if the work involves an alteration to your Church exterior or sanctuary, or to a building – eg your Hall – beside the Church, the Trustees will have to take into account the opinion of the Committee on Church Art and Architecture.

Appendix II
Reg 2 (e)

- you must complete the General Form A, the Financial Limit Form B and the Central Fabric Fund Application Form C before submitting them together with the supporting documents to Presbytery. If approved, the Clerk will complete the Presbytery sections of the Forms before sending them to the General Trustees.

I am planning a project which will involve an application for Historic Scotland Grant Aid. What do I do?

A Appendix II
Reg 2 (c)
Reg 2 (e)

- as Historic Scotland Grant Aid is only available for repair, restoration or conservation, the project is unlikely to involve any alterations. However your project is almost certain to invoke the Financial Limit so, as a first step, you will have to complete a General Form, a Financial Limit Form and, if you are also seeking financial assistance from the General Trustees, a Central Fabric Fund Application Form for submission to Presbytery. If approved, the Clerk will send the completed forms and supporting documents to the General Trustees. The Trustees will consider the papers taking into account the views of the Presbytery Planning Task Group.
- in due course, you or your Congregation's Architects, must also submit the Historic Scotland Application Form and supporting documents to the General Trustees **via the Presbytery**. These will include a General Form even if one has already been submitted at an earlier stage.
- Once the papers are received from the Presbytery Clerk by the General Trustees they will be passed to the Committee on Church Art and Architecture for its opinion. In most cases, the Presbytery Planning Task Group will have made known its views already. It is part of the working arrangements with Historic Scotland that all applications to that body must be channelled through the General Trustees.
- in many cases where Historic Scotland grant aid is being considered, the question of Lottery funding will also be an issue. Congregations should remember
 - the limits imposed by the General Assembly on the making of applications.
 - that applications can only be made by the Kirk Session and only after it has formally agreed it is appropriate to do so.
 - Presbytery has no direct say in whether an application can or cannot be made.

I have to carry out emergency repairs to one of my Congregation's buildings. Do I need to go through the approval procedure?

Reg 4 (c)

- No, you do not need to do so as long as the work is **urgently necessary** in the interests of **safety** or for **preservation of the building**. However you must notify **both** Presbytery and the General Trustees giving full details of the work and why it was necessary.

How long is it going to take for approvals to be given?

- much will depend on how accurately you complete the various forms, how much informal advice and guidance has been obtained at an early stage and how well the new procedures are adhered to. However the General Trustees, the Committee on Church Art and Architecture and the Presbytery Planning Task Group have either re-arranged their meetings and/or their procedures to provide a framework for speedy decisions but this is dependent on Presbytery sending on the papers soon after decisions have been made.
- you will often have to submit details of the work or the funding to one of your Presbytery's Committees – eg Property, Finance, etc. The matter will then be dealt with at the next full Presbytery meeting, often two or three weeks later. Once the papers are passed to the General Trustees' Secretariat, then final approval from the Trustees (taking into account the views of the Committee on Church Art and Architecture [CARTA] and Presbytery Planning Task Group where appropriate) could be given as little as four or five weeks later – a total timescale of six to eight weeks.

What happens if Presbytery and/or the General Trustees do not approve my request to carry out work at one of my Congregation's buildings?

Reg 2 (d)
Reg 3 (e) (f)

- hopefully, this situation will be rare but there are opportunities for appeal to the Commission of Assembly. The detailed rules are set out in the Regulations.

AND FINALLY

- the foregoing examples envisage that all aspects of your project are dealt with at the same time – ie, the carrying out of the work, applications for financial assistance from the Central Fabric Fund or Historic Scotland etc. In large or complex projects such as major restorations involving funding from various sources, it is likely that approvals for the various aspects will be dealt with in several stages over a period of time.
- there will be occasions when Presbytery and/or the General Trustees will give approval in principle subject to one or more conditions being fulfilled – eg, receiving detailed plans or a certain level of funding being in place.

Appendix III
(a) and (b)

- there are certain types of work which do not – **unless the Financial Limit is invoked** – require the approval of the General Trustees. In general terms these involve repairs at Manses or straightforward redecoration of Churches and Halls.

Appendix III
(c) and (d)

- there are certain types of work which do not – **unless the Financial Limit is invoked** – require the approval of the General Trustees so long as the Committee on Church Art and Architecture and/or the General Trustees’ Energy Consultant have approved. Accordingly it can help to speed up the formal process if the Artistic Matters Committee and/or the Energy Consultant are consulted at an early stage.
- the various Forms referred to in the Guidelines are available from your Presbytery Clerk or Property Convener as well as from the General Trustees Secretary’s Department and can be downloaded from the General Trustees’ section of the Church of Scotland website.
- remember that your Presbytery, the General Trustees and the Committee on Church Art and Architecture are there to help you and consultation is encouraged. There should be no question of “them and us”.
- Some useful contact names in the Church Offices at 121 George Street, Edinburgh (0131 225 5722) are:

Committee on Church Art and Architecture

Ms Anna Reid (Senior Administrator)

General Trustees

Mr Keith Mason, Depute Secretary
Mr Brian Waller, Assistant Secretary -(Ecclesiastical Buildings)
Mr Robert J Lindores, Senior Administrator (Energy Conservation Scheme)

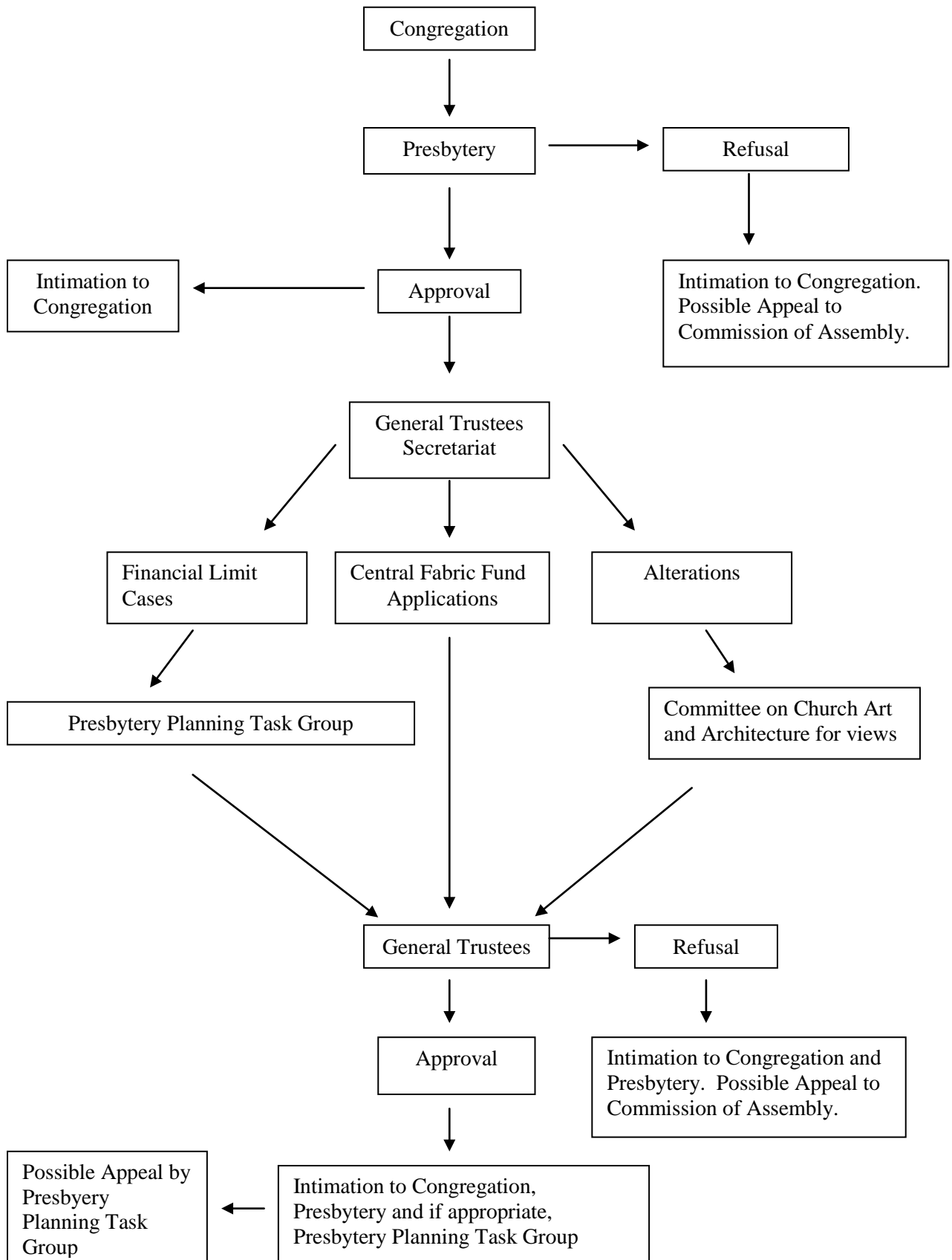
General Treasurer’s Department

Mr Alex Semple, Assistant Treasurer

Law Department

Mrs Janette S Wilson, Solicitor of the Church

The following flow chart shows in a simplified form the procedures to be followed in cases where approval is required from Presbytery and the General Trustees.



APPENDIX I

REGULATIONS

regarding

WORK AT ECCLESIASTICAL BUILDINGS

1. Introductory

- (a) These regulations apply in respect of ecclesiastical buildings held by or on behalf of any court or congregation of the Church of Scotland, within the Presbyteries in Scotland and England.
- (b) In the regulations the following definitions apply:-
 - (i) The term “ecclesiastical building” includes all properties pertaining to a congregation whether or not in use for the purposes of the congregation and in particular but without prejudice to the foregoing generality includes churches, church halls, manses, houses for assistant or associate ministers, church officer’s houses, retirement houses, ancillary buildings or outbuildings and properties which are let; any object or structure fixed to an ecclesiastical building or forming part of the land and comprised within the curtilage will be treated as part of the building. For the purposes of these regulations congregations of Church Extension Charges and New Charges will not be deemed to be congregations until they attain full status.
 - (ii) The term “repair” as applied to ecclesiastical buildings means in general the carrying out of operations to make good and includes in particular restoration and redecoration which do not bring about any change in the character or appearance of the subjects.
 - (iii) The term “alteration” as applied to ecclesiastical buildings means in general any change thereto and includes in particular demolition (including partial demolition), erection, extension, reconstruction, restoration and redecoration except in so far as the same are embraced within the definition of “repair”.
 - (iv) The term “Financial Board” means the Congregational Board or other body in the congregation having charge of the property of the congregation.
 - (v) The term “Financial Limit” means that sum of money falling to be determined by the General Assembly in terms of paragraph 4 (a) of the regulations.

2. Presbytery Approvals

- (a) Subject to the provisions in paragraphs 2 (b) and 4 (c) of the regulations, a Financial Board shall not without first obtaining the approval of Presbytery of the bounds instruct the carrying out of repairs or alterations at an ecclesiastical building.
- (b) Each Presbytery is authorised and empowered from time to time to make provision by way of resolution that the requirement for its approval may be dispensed with in such circumstances and on such conditions as it may deem appropriate except that it will have no power to make any provision which elides the necessity for obtaining Presbytery approval for work at an ecclesiastical building which meets any of the following criteria:-
 - (i) The cost exceeds the Financial Limit.
 - (ii) The cost plus the cost of work at the same building authorised by Presbytery during the previous three years, exceeds the Financial Limit.
 - (iii) The cost plus the cost of other work likely to be required at the same building over the following three years, is likely to exceed the Financial Limit.
 - (iv) The work is otherwise work which requires the approval of the General Trustees.

Work meeting criteria (i), (ii) or (iii) is hereinafter referred to as work which invokes the Financial Limit.

In the case of work meeting criterion (iv) but not work meeting criteria (i), (ii) or (iii), Presbytery is empowered to resolve that approval is deemed to be granted if the same is authorised by the Presbytery Property Convener or some other person or body nominated by Presbytery.

Any resolution by Presbytery hereunder will have no effect until it has, in writing, been intimated to and acknowledged by the General Trustees.

- (c) When Presbytery is dealing with applications for approval of work at a building, Presbytery shall consider all relevant factors including the Presbytery Reappraisal Plan, the number of buildings for which the congregation is responsible, whether the particular building is likely to be required by the congregation in the medium to long term, the need for the work in the interests of safety or to preserve the value of the building as a marketable asset and the impact of the proposed expenditure on the congregation's other commitments such as contributions towards their Ministry and Mission Allocations.
- (d) If a Presbytery withholds approval for work, the Financial Board or Boards of the congregation or congregations concerned will have a right of appeal to the Commission of Assembly subject to compliance with the following provisions:-
 - (i) It shall be the duty of Presbytery in such circumstances to advise the Financial Board or Boards forthwith in writing both of their right of appeal and the time limit which applies.
 - (ii) A Financial Board wishing to lodge an appeal must intimate the same in writing both to the Principal Clerk of the General Assembly and to the Presbytery within 21 days of the Presbytery having intimated in writing that it has resolved to withhold approval for work.
 - (iii) The Principal Clerk of the General Assembly shall, as soon as possible following receipt of the appeal, give notice to the congregation and the Presbytery that they are each required to lodge with the Principal Clerk within 21 days all appropriate papers and Extract Minutes.
- (e) When approval has been granted by or on behalf of Presbytery for work which requires also the approval of the General Trustees the application shall be transmitted immediately to the Secretary and Clerk of the General Trustees. Presbyteries are empowered in cases where work does not require the approval of the General Trustees but Presbytery, for any reason, financial or otherwise, considers that it would be appropriate for the General Trustees to consider this work, to approve subject to the approval of the General Trustees and to pass the application on to the Trustees' Secretary and Clerk with its observations.

3. General Trustees' Approvals

- (a) Subject to the provisions of paragraphs 3 (d) and 4 (c) of the regulations a Financial Board shall not without first obtaining the approval of the General Trustees instruct the carrying out of alterations at an ecclesiastical building or of work at an ecclesiastical building which invokes the Financial Limit.
- (b)/

- (b) The General Trustees shall not give unconditional approval for the carrying out of an alteration to the exterior of a church building or of a building within the curtilage of a church building or to the sanctuary of a church building without the opinion of the Committee on Church Art and Architecture having been obtained thereon and taken into account.
- (c) The General Trustees shall not give unconditional approval for the carrying out of work at an ecclesiastical building where the cost of work invokes the Financial Limit without the opinion of the Presbytery Planning Task Group having been obtained thereon and, in the event of the Committee not concurring, taken into account. This provision will not apply to work at manse, houses for assistant or associate ministers, church officer's houses or retirement houses unless the same form part of a church or hall building.
- (d) The General Trustees are authorised and empowered from time to time to make provision by way of resolution that the requirement for their approval may be dispensed with in such circumstances and on such conditions as they may deem appropriate except that they will have no power to make any provision which conflicts with the requirements of paragraphs 3 (b) or 3 (c) of the regulations. Any such resolution will have no effect until it is either printed and issued in a Report of the General Trustees to the General Assembly or intimated in writing to every Presbytery in Scotland and England.
- (e) On making a decision under the regulations to approve or not to approve of work, the General Trustees will be bound to intimate the same forthwith to:-
 - (i) The Presbytery concerned
 - (ii) The Financial Board or Boards of the congregation or congregations directly affected and
 - (iii) In cases where the cost of the work invokes the Financial Limit and the Presbytery Planning Task Group has not concurred, that Committee.

If a decision not to approve of work is based on views expressed by the Presbytery Planning Task Group, the General Trustees will be bound to incorporate a statement to that effect in the intimation.

- (f) The following provisions will apply with regard to the review of decisions made by the General Trustees where the Presbytery Planning Task Group has not concurred in the carrying out of the work:-
 - (i) If a decision of the General Trustees is not to approve of work and is stated to be based on views expressed by the Presbytery Planning Task Group, it will, in so far as that aspect is concerned, be subject to review at the instance of the Presbytery or a Financial Board concerned which shall within two months of the date of the issue of the relevant intimation by the General Trustees and subject to compliance with the Standing Orders of the General Assembly, intimate in writing to the Principal Clerk of the General Assembly that it takes the case by Reference to the Commission of Assembly for review; provided always that in such circumstances a Reference will be competent only if written intimation to the Principal Clerk is given timeously and written intimation thereof given at the same time to the General Trustees and the Presbytery Planning Task Group.
 - (ii) If a decision of the General Trustees is to approve of work, where the cost of the work invokes the Financial Limit and the Presbytery Planning Task Group has not concurred, the decision will be subject to review at the instance of that Committee which shall within two weeks of the date of the issue of the relevant intimation by the General Trustees and subject to compliance with the Standing Orders of the General Assembly intimate in writing to the Principal Clerk of the General Assembly that it takes the case by Reference to the Commission of Assembly for review; provided

always that in such circumstances a Reference will be competent only if written intimation to the Principal Clerk is given timeously and written intimation thereof given at the same time to the Presbytery and Financial Board or Boards concerned and to the General Trustees.

- (iii) The procedure in respect of References made under the foregoing provisions will follow that applicable to References in Readjustment Cases and where the decision of the General Trustees is to approve of work, the work shall not be put in hand until after either (a) the period of two weeks has expired and no Reference by the Presbytery Planning Task Group has been intimated or (b) such Reference having been intimated has been withdrawn or (c) the decision of the General Trustees has been confirmed by the Commission of Assembly.

4. General

- (a) The General Assembly on the Report of the General Trustees shall determine and thereafter review at intervals of no longer than 5 years the amount of the Financial Limit.
- (b) The provisions in these regulations apply irrespective of the body in which an ecclesiastical building is vested or the manner in which the titles are held and, in particular, will cover subjects held on lease, and are without prejudice to the need to obtain any additional consents or approvals which may be necessary for the carrying out of work and resulting from any requirement in the titles, the constitution of the congregation or otherwise.
- (c) Where a repair or alteration to an ecclesiastical building is urgently necessary in the interests of safety or for the preservation of the building the Financial Board may proceed to have such work done without obtaining such approvals as would otherwise be required under these regulations but shall give immediate written notice to Presbytery and to the General Trustees of the need for the works and full details of what has been instructed.
- (d) Any approvals given under these regulations by Presbytery or by the General Trustees for the carrying out of repairs or alterations will not infer the approval of either body to the making available towards the cost of any funds held or administered by the General Trustees or any other body exercising supervision thereof on behalf of or under delegated powers from the General Assembly and in the event of the Financial Board wishing to apply for the release of such funds it shall specifically seek such approvals as are necessary in that regard.
- (e) Any approval granted by Presbytery or the General Trustees under these regulations will, unless acted upon, lapse after a period of three years from the date upon which it was granted.
- (f) There are hereby rescinded (i) Regulations V 1989 as amended by the Assembly of 1992 and (ii) any other regulations and practice of the Church relating to repairs or alterations in so far as such are inconsistent with these regulations.
- (g) The General Assembly reserve power to amend, alter or rescind these regulations at any time as they may think proper.

APPENDIX II

THE FINANCIAL LIMIT

The concept of the Financial Limit dates from the setting up in 1992 of the Consultative Committee on Church Properties. The Committee was discharged with effect from 1 January 1999 but the 1998 General Assembly, in the light of the experience of operating the Financial Limit, altered the concept by bringing past and projected expenditure into the equation.

The following points should help in determining whether the Financial Limit is invoked and what to do thereafter:

- the Financial Limit is £50,000.
- the Financial Limit applies to all work whether repairs or alterations.
- the cost of work should include professional fees and VAT where appropriate.
- the Financial Limit will apply to each of your Congregation's buildings – eg, where a Congregation has a separate Church, Hall and Manse then there is a Financial Limit in respect of each. Where a Congregation has a complex or suite of buildings including a combination of Church, Hall and Manse then one Financial Limit will apply to that complex.
- the Financial Limit will be invoked if **one** of the following three situations occurs:
 - either** the cost of the present work exceeds £50,000,
 - or** the cost of the present work PLUS the cost of work at the same building **which has been authorised by Presbytery** in the past three years exceeds £50,000,
 - or** the cost of the present work PLUS the cost of work at the same building which you are likely to have to carry out in the next three years exceeds £50,000.
- if the figure brought out by any one of the previous calculations exceeds £50,000 then you must seek approval before doing any of the work by submitting a General and a Financial Limit form to the Presbytery. If approved the forms and supporting documents will be submitted to the General Trustees for their approval.
- in coming to their decision the General Trustees must take into account the views of the Presbytery Planning Task Group except where the situation involves work at a Manse or other house which is not part of a Church or Hall.
- if your Congregation is contemplating a phased programme of work at one of its buildings, you should seek approval for the whole programme in the first instance although you should recognise that in certain circumstances there may have to be further referrals to Presbytery and the General Trustees at a later stage.
- in cases where the cost of immediate work plus likely expenditure over the next three years comes close to the Financial Limit, you should seriously consider seeking approval either for the estimated cost of the projected work or for a fixed sum reflecting the likely routine expenditure on the same building over this period. Otherwise you might have to keep referring comparatively modest expenditure to Presbytery and the General Trustees for approval.

APPENDIX III

APPROVAL BY GENERAL TRUSTEES

In terms of the Regulations the approval of the General Trustees is required for alterations at an ecclesiastical building and for work where the Financial Limit is invoked. However, the Trustees have resolved, **without prejudice to the requirement for their approval in Financial Limit cases**, that their approval will **not** be required for the following types of alteration:-

- (a) Work at manses or other houses except (i) plans of new buildings (ii) work at manses which will reduce the number of public rooms and bedrooms to six or less and (iii) external alterations at manses or other houses which are so situated that a change in their appearance will affect the appearance of the church.
- (b) Redecoration apart from (i) redecoration of the sanctuary of a church and (ii) redecoration which changes the external appearance of a church or of another building which is so situated that a change in its appearance will affect the appearance of the church.
- (c) Work which has been approved by the Committee on Church Art and Architecture (CARTA) and which consists of (i) non-structural work to the interior of a church, church hall or ancillary building, (ii) redecoration which changes the external appearance of a church or of another building which is so situated that a change in its appearance will affect the appearance of the church (iii) other external alterations at manses or other houses which are so situated that a change in their appearance would affect the appearance of the church or (iv) alterations to the layout of the grounds of a church or hall.
- (d) Installation or modification of space heating systems where the work has been approved by the General Trustees' Energy Consultant and, in cases involving an alteration at a church, the Committee on Church Art and Architecture.

It can help to speed up the formal process if the particular types of proposal mentioned in paragraphs (c) and (d) can be cleared by the Congregation directly with the Committee on Church Art and Architecture and/or Energy Consultant. If these approvals have been secured, the proposals may not require to be cleared by Presbytery but this depends on the terms of your Presbytery's "exemption" resolution. If such proposals are referred to Presbytery without the prior approval of the Committee on Church Art and Architecture and/or Energy Consultant having been obtained, then the proposals will have to be referred to the General Trustees in the usual way.