

Bringing people closer to Jesus Christ through His Church
Catholic Diocese of Portsmouth



Diocesan Estates Policies – DOP B1 Day to Day Care of the Estate

“Where there is no guidance, a nation falls, but in an abundance of counsellors there is safety.”

Proverbs 11:14

Issued by:

The Bishop of Portsmouth and the Trustees of the Portsmouth Diocesan Trust
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FOREWORD

God's Church here in the Diocese of Portsmouth is formed of many and varied communities, held together in the same Truth of Christ both in doctrine life and worship. We need common operating procedures across the Diocese to ensure compliance with the needs of both canon and civil law. In addition, and especially in the light of the church's call to the work of new evangelisation, we need to ensure harmonised collaboration. We have a responsibility to ensure that people, buildings, and money are treated carefully allowing us to perform our duties "with the diligence of a good householder" (Canon 1284§1).

So, I present to you an updated version of our Diocesan Policies and Operating Procedures for Estates - DOP B. These DOPs have the status of particular law for the Diocese of Portsmouth. They must be understood and followed in the broad areas of human resource, schools, buildings, and finance.

I am very grateful to all those who have compiled these procedures and ensure their regular review and updating.

In Corde Iesu

+Bishop Egan
Bishop of Portsmouth

"We have some beautiful buildings and a serious challenge; we need to support the mission needs of the Church whilst keeping all the buildings of the Diocese compliant with the law and their occupants safe and comfortable. We must do this within the finances available to us. This document is written to help you make your land and buildings a well-run asset that supports you and your parish".

Hilary Foley – Director of Estates

The Diocesan Estates Policies and Operating Procedures (DOPs) B are provided as guidance to managers and to employees on how a wide range of issues should be managed in relation to the Diocesan and Parish Estate.

The underlying rationale to DOPs B is to provide a framework of policies and procedures which ensure that all property is managed so as to

- Provide the most effective and efficient pastoral provision for the diocese
- Maximise the income from diocesan capital holdings
- Protect our Catholic heritage
- Protect the environment
- Ensure the safety of all users of the estate

Estates policies provide general and practical advice as well as guidance on a range of estates issues in order to ensure all employees (and volunteers) manage the estate effectively and in addition to ensuring adherence to all applicable legislation.

Estates procedures support and supplement the policies by giving a step-by-step account of specific arrangements that apply in particular circumstances.

Forms and Guidance notes are also provided throughout relating to the policies and procedures.

This DOP is subject to changes brought about by relevant legislation, regulations and changes in best practice. Any changes and amendments that may be made to this document will be brought to the attention of line managers and Parishes. They will then be guided towards the current version online.

<http://www.portsmouthdiocese.org.uk/procedures>

Guidance on any Estates and Property matters are available from the Curia: Estates Team: Tel. 02394 216480



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B1B: Procedures for the Day-to-Day Management of the Estate

Accessed via hyperlinks and downloadable from website

B1C: Additional Guidance for the Day-to-Day Management of the Estate

Accessed via hyperlinks and downloaded



B1A: Policies for the Day-to-Day Care of the Parish Estate

Ecclesiastes 7:12: For wisdom is protection just as money is protection, But the advantage of knowledge is that wisdom preserves the lives of its possessors.

1. Introduction

The aim of this policy is to ensure that all diocesan and parish sites and buildings are maintained in a safe condition and their future value protected.

2. Purpose

This policy sets out the inspection reports that are required by the Trustees of the Diocese carried out and the regularity of the inspections required.

3. Scope

This policy will be applied to all property owned by or controlled by Portsmouth Roman Catholic Diocesan Trustees Registered.

4. Roles and responsibilities (relating to the church estate and according to [Canon Law and Vatican Instruction](#))

4.1. Bishop

The Bishop is ultimately responsible for the temporal goods of the diocese finances of the diocese including all church property. He is responsible for ensuring full compliance with Statute and Canon Law. He must regularly visit each part of the diocese. Canon 473 §1 The Bishop must ensure that everything concerning the administration of the whole diocese is properly coordinated and is directed in the way that will best achieve the good of that portion of the people of God entrusted to his care, in full accordance with [Directory for the Pastoral Ministry of Bishops "Apostolorum Successores" \(vatican.va\)](#)

4.2 Trustees

Our Trustees are responsible for ensuring that everything that is done in the name of Portsmouth Roman Catholic Diocesan Trustees Registered (PRCDTR) is in accordance with the wishes of the Bishop in delivering its charitable objectives with the diligence of a good housekeeper Canon 1284. The Trustees must also ensure that the Diocese complies with all legal and regulatory requirements.

4.3 Deaneries and Pastoral Areas

Under Canon 374 §1 every diocese or other particular church is to be divided into distinct parts or parishes, in order §2. to foster pastoral care through common action. In the Diocese of Portsmouth, the Parishes in Pastoral Areas and Deaneries work together for the benefit of all Parishioners in a geographical area, following VI N200720a VII. c.



4.4 **Parish Priest**

4.4.1 Under Canon 519 the Parish Priest is the proper pastor of the parish entrusted to him, exercising the pastoral care of the community committed to him under the authority of the diocesan bishop in whose ministry of Christ he has been called to share, so that for that same community he carries out the functions of teaching, sanctifying, and governing...according to the norm of law.

4.4.2 It is therefore the responsibility of the Parish Priest to ensure that the property within their care is compliant with the law, properly maintained and fully insured in order to minimise the risk of harm to all users of the Diocesan Estate.

4.4.3 Parish Priests must ensure that a Parish Finance Committee is in place to monitor and advise on all Finance and Property matters. All consultation on Finance and Property matters must include the Finance Committee, therefore if a Finance Committee does not exist, the Parish Priest should inform a Vicar General, who may be able to provide support in setting one up.

4.4.4 In order to assist the priest, the following roles should be covered (these roles may be shared or combined, voluntary or paid) but must cover the following areas:

- Parish Finance Chair
- Parish Administrator
- Health & Safety Representative
- Building Maintenance

4.5 **Parish Committees**

4.5.1 Parish Priests must ensure that a Parish Finance Committee is in place to monitor and advise on all Finance and Property matters. Under Canon 537 the Parish Finance Committee should consist of all parish clergy and at least three lay people appointed by the Parish Priest.

4.5.2 Alongside the priest, the Parish Finance Committee's responsibilities include protecting people or property and conserving all parish property, protecting boundaries, maintenance of buildings and development projects, preparing an inventory, and ensuring that rents are collected.

4.5.3 On appointment to the Finance Committee all new members must be asked to read the Estates Policies and Operating Procedures and confirm that they understand their responsibilities. The Diocesan Estates Team is always available to provide advice and support.

4.5.4 Parish Finance Committees must work in close collaboration with the Parish Pastoral Council and/or the Evangelisation Strategy Team where available.

4.5.5 For major projects it is recommended that a dedicated sub-committee is formed. It



is also responsible for ensuring, as far as possible, that the Parish has sufficient financial resources to perform its major functions both in the present and for the future.

4.6 **Curia**

Under Canon 469 the Diocesan Curia (which includes the Diocesan Estates Team) role is to assist the Bishop in governing the entire diocese, especially in directing pastoral action, in providing for the administration of the diocese, and in exercising judicial power. In the Diocese of Portsmouth, the Curia also provides support to the Priests and their Parishes in complying with all areas covered by these operating procedures, and should be the first point of call to advise on any areas of concern.

5. **Compliance with Statutory Requirements**

The statutes associated with this policy are:

- 5.1 [Control of Asbestos at Work Regulations \(2012\)](#)
- 5.2 [Health and Safety at Work Act \(1974\)](#)
- 5.3 [Management of Health and Safety at Work Regulations \(1999\)](#)
- 5.4 [Fire Reform Act \(2005\)](#)
- 5.5 [The Construction \(Design & Management\) Regulations \(2015\)](#)
- 5.6 [Lifting Operations & Lifting Equipment Regulations \(1998\)](#)
- 5.7 [Provision & use of work equipment Regulations \(1998\)](#)
- 5.8 [Control of Substances Hazardous to Health COSHH \(2002\)](#)
- 5.9 [Electricity at work Regulations \(1989\)](#)
- 5.10 [The Gas Safety \(Instillation & Use\) Regulations 1998](#)
- 5.11 [The Control of Pollution \(Oil Storage\) \(England\) Regulations 2001](#)
- 5.12 [Work at Height Regulations 2005](#)
- 5.13 [Charities Act 2011](#)

6. **Inspection schedule:**

6.1 At the beginning of each financial year, every parish must determine which inspections will fall due in the next 12 months.

6.2 Budget costs for each inspection should be included in the parish financial return.

6.3 Inspections must be booked and access arranged by a nominated parish representative so that reports are received by the due deadline.

6.4 The parish priest must nominate a parish representative to fulfil this role or undertake this role themselves.

6.5 If the parish priest has nominated a parish representative to fulfil this role, they must notify the Diocesan Estates Team who will be fulfilling this role and provide contact details.



6.6 All inspection reports must be emailed on receipt to propertyinspections@portsmouthdiocese.org.uk.

7. **Overdue Inspections:**

7.1 Where statutory inspection reports are overdue, the Diocesan Estates team may be instructed by the Chief Operating Officer to procure inspections on behalf of the parish and charge a fee for this service. In addition, any parish may choose this service on a voluntary basis.

8. **Building & Site Inspections**

It is a requirement that the following building and site inspections are carried out:

8.1 Quinquennial surveys, usually every 5 years – see [procedures](#)

8.2 Where a parish has a bell tower, annual inspection – see [procedures](#)

8.3 Gutters, annual inspection – see [procedures](#)

8.4 Where trees (with trunk diameter over 150mm) on site, annual inspection – see [procedures](#)

8.5 Steps and footpaths, quarterly inspection – see [procedures](#)

8.6 Graveyards, annual inspection – see specific policy & [procedures](#)

8.7 Fire safety inspections, annually – see specific policy & [procedures](#)

8.8 In addition to electrical inspections, where hanging sanctuary lamps and hanging light fittings present, the security of the fittings must be inspected annually - see [procedures](#)

8.9 Where asbestos present, annual inspection – see specific policy & [procedures](#)

8.10 Where fall arrest systems present, - see specific procedures

9. **Mechanical & Electrical Inspections**

The following mechanical and electrical inspections should be carried out:

9.1 Electrical fixed wiring, usually every 5 years – see [procedures](#)

9.2 Emergency lighting, as risk assessment – see [procedures](#)

9.3 Lightning conductors, where fitted every 11 months – see [procedures](#)



- 9.4 Portable appliance testing, as risk assessment – see [procedures](#)
- 9.5 Portable fire extinguishers, annually – see [procedures](#)
- 9.6 Where gas present, annually – see [procedures](#)
- 9.7 Legionella inspections, if required following risk assessment – see [procedures](#)
- 9.8 Where lifts present, as risk assessed – see [procedures](#)
- 9.9 Where oil tanks are present – see [procedures](#)

10 Insurance Requirements

All terms and conditions of our insurance provider must be fully complied with, including qualifications and levels of insurance.

10.1 Working on utilities (gas/water/electric), working on roofs and hot work are considered to be “Dangerous Works”.

10.2 Working at height (other than on roofs) and the use of power tools are no longer deemed to be dangerous work.

10.3 Contractors carrying out dangerous work must carry a minimum of £5,000,000 Public Liability insurance.

10.4 Volunteers must not undertake “Dangerous Works” as any damage caused will not be covered under the Catholic National Mutual Property Policy (CNM Ltd).

10.5 Contractors carrying out all other work must carry a minimum of £2,000,000 Public Liability insurance.

10.6 Where volunteers are used for other work there is no requirement for them to demonstrate that they hold public liability insurance as they will be covered under the diocesan policies.

10.7 For further details please refer to the Catholic National Mutual [Guidance Note](#)

11. Property Maintenance Log

All properties should have a property maintenance log – see [Template](#)

11.1 The property maintenance log must record all works of maintenance, alteration, addition, removal or repair



11.2 The property log must be made available to the Diocesan Estates Team upon request.

12. Parish Asset Management Plan

Each parish should have a Parish Asset Management Plan – see [template](#). The asset management plan should be produced from the results of the quinquennials and inspections. It should address work in the following order of priority.

12.1 Compliance: Have the risks to a person and reputation been fully addressed

12.2 Condition: is the building weathertight and warm

12.3 For residential property: Is the building fit for habitation?

12.4 For rental property: Does the building comply with requirements for letting

12.5 Suitability: Is the property helping the parish fulfil its mission

13. Parish Property Return

The Parish Finance Committee should complete an annual Parish property return – see [template](#)

13.1 This will form part of their annual financial return and should be submitted in October of every year.

13.2 For each property it should include utility costs, routine planned maintenance, reactive maintenance and major works identified in the Parish Asset Management Plan.

13.3 It must also include summary reports for all projects separately approved by Trustees where the parish has been provided with a Project Number.

13.4 It should also include a property valuation and assessment of insurance rebuild costs. If these are unavailable, please contact the Diocesan Estates Team who can arrange.

14 Parish Inventory

14.1 Parishes are required to keep an up-to-date Inventory (Vatican N200720a:67)

14.2 This inventory should clearly indicate which items are the property of an individual priest and which items are the property of the parish.

14.3 Guidance on preparing an inventory may be found here

14.4 Parishes must check their insurance policy each renewal date and at a change of priest to confirm that the contents cover is still appropriate.



15 Heritage Buildings

Where parishes contain listed or listable buildings, or are in a conservation area, the following additional requirements apply.

15.1 All staff and volunteers are to be made aware that the property is listed or listable and that special rules apply to its care. It is a criminal offence to make unauthorised alterations to listed buildings with the sanction of possible imprisonment or significant fines.

15.2 All cleaning must be carried out in accordance with Catholic Bishops Conference of England and Wales (CBCEW) [recommendations](#).

15.3 No adhesive tape is to be applied to any elements of the building.

15.4 No alterations, removals or additions are to be made to the building or its surroundings without consulting the Diocesan estates team.

15.5 All works to listed or listable buildings must be carried out under the oversight of a [Conservation Accredited](#) Architect or Surveyor.

15.6 All alterations, removals or additions to listed or listable churches including attached halls, will require a Faculty (consent) from the [Historic Churches Committee](#), which should be submitted via the Diocesan Estates Team.

15.7 All alterations, removals or additions to locally or nationally listed presbyteries, halls and the exterior of all buildings may require separate [planning consent](#) from the relevant local authority.

15.8 In an Emergency, an Emergency, an 'Emergency Faculty' may be obtained with the support of the Diocesan Estates Team within hours. In all other cases the full process may take months. Allow enough time for the process.

15.9 VAT must be reclaimed via the Listed Places of Worship Grants Scheme [LPWGS](#) for all qualifying invoices related to the maintenance of listed churches.

16 Unoccupied Buildings

16.1 Parishes must inform our insurers via the Catholic Insurance Service [website](#), when the parish expects a building to be unoccupied for 90 days.

16.2 Parishes should consult the insurers at the earliest stage so that advice may be given on the cover options available to the parish.

16.3 Further information on the definition of an unoccupied building and details of exclusions may be found in the linked [CNM Guidance Note](#).



B1B: Procedures for the Day-to-Day Management of the Estate

17. Procedures for the commissioning of Quinquennials
18. Procedures for parishes with belltowers
19. Procedures for gutter inspections
20. Procedures for Tree Inspections
21. Procedures for inspections of steps and footpaths
22. Procedures for inspections of graveyards
23. Procedures for Fire Safety Inspections (Fire Risk Assessments)
24. Procedures for fire extinguisher testing
25. Procedures for fire alarm testing
26. Procedures for parishes with asbestos
27. Procedures for parishes with fall arrest systems
28. Procedures for Fixed Electrical Systems
29. Procedures for Emergency Lighting systems
30. Procedures for Portable Appliance Testing
31. Procedures for lightning protection systems
32. Procedures where gas is present
33. Procedures for legionella inspections
34. Procedures for lift inspections
35. Procedures for oil tank inspections

B1C: Guidelines

[Health & Safety Checklists for Parish Halls](#)

[Guidelines and templates for a Quinquennial](#)

[Guidelines and templates for creating a Property Maintenance Log](#)

[Guidelines and templates for a Parish Asset Management Plan](#)

[Guidelines and templates for the Parish Property return](#)

[Guidelines for making a Church Inventory](#)

[Recommendations for cleaning listed buildings](#)

[Guidance on reclaiming VAT - works on Listed Churches](#)



Operative date	April 2021
Owner	Director of Estates
Review date	March 2024
For action by	All priests, employees and volunteers
Policy statement	These policies provide the information needed for the day to day management of the estate.
Responsibility for dissemination to new employees	Line Managers
Mechanisms for dissemination	This policy will be promoted via the Diocese of Portsmouth's internal newsletter and intranet and published on the Diocese of Portsmouth website.
Training implications	All parish priests, employees and volunteers at induction.
Resource implications	There are no resource implications arising from this policy.

Approvals

The signatures below certify that this document has been reviewed and accepted demonstrating that the signatories are aware of all requirements contained herein and are committed to ensuring their provision.

	Name	Signature	Position	Date
Prepared by	Hilary Foley		Director of Estates	02 2021
Reviewed by	FAR			03 2021
Approved by	Trustees			

Amendment Record

This document is reviewed to ensure its continuing relevance to the systems and processes that it describes. A record of contextual additions or omissions is given below.

Page No.	Context	Revision	Date