

## 6.2 PARISH MANAGEMENT OF CLERGY HOUSING

### PROCEDURE

- Stage 1      Inspection Prior to Incumbent Occupancy
- Step 1      Licensed Property Manager prepares a property inspection report.
  - Step 2      Digital record prepared of the property
  - Step 3      New Incumbent receives copy of the Property Inspection Report for their review and signature.
- Stage 2      Inspection prior to vacating premises by an outgoing Incumbent
- Step 4      Archdeacon inspects the property
  - Step 5      Final inspection to ensure required works completed
- Stage 3      Inspection at the end of their Incumbency
- Step 6      Licensed Property Manager to undertake an inspection
  - Step 7      Property to be made ready for the incoming Incumbent.
- Stage 4      Annual Inspection
- Step 8      Clergy Housing, associated buildings, and grounds to be inspected annually
  - Step 9      Incumbent to report on any breakages, damage, etc.
  - Step 10     Three year rolling maintenance program for Clergy Housing to be prepared.
  - Step 11     Rolling maintenance program to be approved by Parish Council or Parish Resources Team and linked to the Budget.

**Stage 1      Inspection prior to new incumbent / assistant occupying Clergy Housing**

Step 1      Prior to occupancy of the Incumbent's / Assistant's residence Churchwardens are to engage the services of a licensed Property Manager to prepare a property inspection report. The Property Manager will inspect the property and complete the inspection report on prescribed forms provided by the Property Manager Institute.

Step 2      Churchwardens will make a digital record of the entire property, including all buildings, grounds and gardens, as well as an inventory of all items provided by the Parish.

Step 3      The new Incumbent / Assistant will receive a copy of the Property Inspection Report, the digital record of the property and a copy of the inventory of items provided by the Parish.

The Incumbent / Assistant is to be asked to check these records and if he/she agrees, to sign the documents and return a copy to the Churchwardens.

**Stage 2      Inspection prior to vacating premises by an outgoing incumbent**

Step 4      Four weeks prior to an Incumbent / Assistant vacating Clergy Housing the Archdeacon of Newcastle will conduct an inspection of the premises, and identify with the Churchwardens the works which are required to be undertaken before the incoming Incumbent / Assistant takes up residence.

Step 5      A final inspection of the Clergy Housing will be conducted by the Archdeacon to ensure the works have been completed before it is reoccupied.

**Stage 3      Inspection at the end of the Occupancy**

Step 6      A licensed Property Manager is to be engaged to complete a vacating inspection report and compile a list of cleaning, gardening or repairs to be undertaken by the occupant if necessary.

This inspection should take into account any fair wear and tear during the occupancy.

Step 7      Once the Property Manager agent is happy with the condition of the property the Churchwardens will invite the Archdeacon to come and carry out a final inspection.

The property should then be made ready for the next occupant (see step 5).

#### **Stage 4 Annual Inspection**

**Step 8** The Clergy housing, associated buildings, and grounds are to be inspected and reported on annually on the anniversary of the occupancy. The Churchwardens must give the occupant notice of the intended inspection 4 weeks prior to the anniversary of occupancy.

Churchwardens are to engage a licensed Property Manager to undertake the annual property inspection and report back to the Churchwardens.

This inspection will include cleanliness, maintenance and repairs, e.g. gutters coming adrift, fences falling into disrepair, etc.

This inspection must be held at a mutually agreeable time between the occupant and the Property Manager, and ensures the privacy of the occupant and his/her family is respected and maintained. The occupant must also cooperate in providing access to the Clergy Housing for this inspection.

**Step 9** Throughout the year the occupant must report any breakages, damage, excessive wear and tear which may occur.

**Step 10** The three year rolling maintenance program for all Clergy Housing, any associated buildings and the grounds is to be reviewed annually, in consultation with the occupant at the time of the annual property inspection, by the Churchwardens, including cost estimates and timing for the works to be undertaken.

**Step 11** The Churchwardens must bring this rolling maintenance program to the Parish Council or Parish Resources Team to seek approval and for the necessary funding to be included in the annual budget.