

CORFF CYNRYCHIOLWYR YR EGLWYS YNG NGHYMRU THE REPRESENTATIVE BODY OF THE CHURCH IN WALES

ONLINE FACULTY SYSTEM

FULL FACULTY GUIDANCE FOR APPLICANTS Version 1.1

Introduction

The full faculty application process (like the new List A and List B applications) is now carried out online instead of using paper forms. Parishes will still submit their applications for review to the DAC, who will then submit them to the Registrar (who checks they conform to the rules of the Church in Wales' Constitution), before he/she in turn submits them to the Chancellor for determination. All the information previously required for a full faculty application is still needed for the online forms eg. completion of a main faculty form (petition) and supporting information (eg. architects plans and specifications, builder's quotes, photographs, etc), plus the public notice of proposed works and statements of significance and need.

When you start a new online faculty application, you will complete the following forms:

- Summary Description of Proposed Works
- Standard Information
- Petition
- Statement of Significance
- Statement of Needs
- Public Notice

The two new forms, Summary Description of Proposed Works and Standard Information, have been introduced with the Online Faculty System (OFS). The Summary Description of Proposed Works form (also known as the Case File) is automatically generated by the system when the Applicant/Petitioner first starts the application, and indicates whether it is a List A, List B or full faculty. In addition, it assigns a unique identification number to the application.

The Standard Information form is completed by Applicant/Petitioner and records information about the church, such as whether it is listed, in a conservation area or national park, and whether the churchyard is used for burials or has other listed structures within in. If a church record already exists in Church Heritage Cymru (CHC), the Church in Wales' church record database, this can be imported into the Standard Information form.

The amount of information you need to supply with your application will be dependent on the type of work you are proposing. Your DAC Secretary will be able to advise you on what is required for your application.

Individual forms do not have to be completed in one go. You can save the information you have entered in any form at any stage and come back to it later. You can also download all forms and documents relating to a faculty.

The OFS and the CHC database are currently located on the same website. Registered Applicants/Petitioners have access to an extra **Applications** tab on which to manage all their faculty applications via an **Applications Dashboard**.

Online help and advice is available within the OFS. Information boxes are visible at the top of each screen which contain advice and/or instructions relating to the form or screen you are viewing. In addition, localised "pop-up" help boxes can be accessed by hovering the mouse pointer over "?" symbols on the online forms. See examples below.

Search the site

Church Cathedral: St Deiniol, Bangor



CHURCH HERITAGE CYMRU

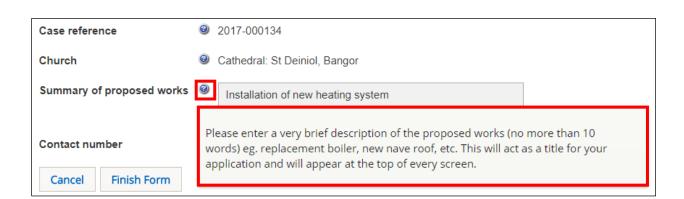
Application Ref: 2017-000134

Diocese: Bangor Archdeaconry: Bangor
Status: Proposal in Preparation Logged By: Mr Dai Jones (Mon 30 Oct 2017)

Summary: Installation of new heating system

In order for the DAC, Registrar and Chancellor to fully consider your application, please complete the forms on the **Details** tab below. Click on the **Submit** button when finished.

You can upload any supporting documents & images to accompany your application from the **Supporting Documents and Images** tab below. To view details of the actions carried out to date on this application, click on the **History** tab. To view any system messages for this application, click on the **Messages** tab.



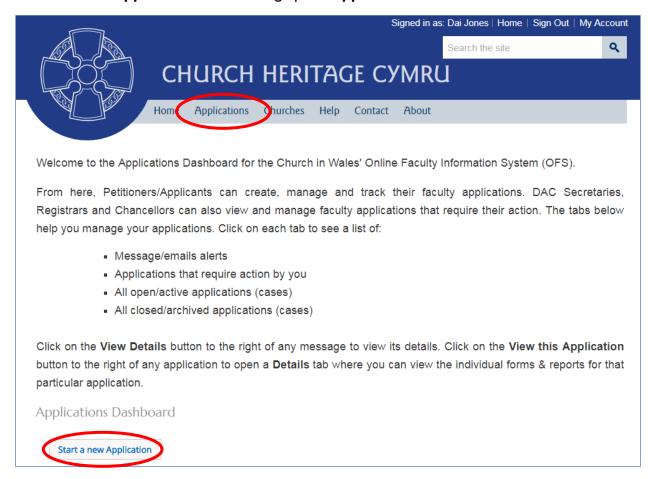
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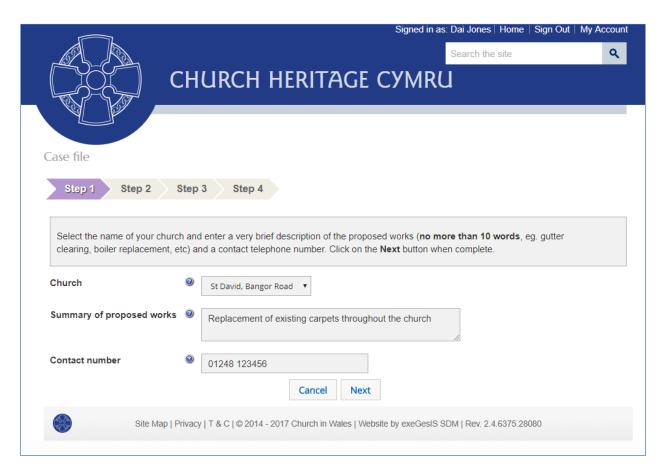
Creating the Case File

The completion of the Case File form is required for all faculty applications and determines whether it will be a List A, List B or Full Faculty.

- I. Sign in to the OFS/CHC (https://churchheritagecymru.org.uk/)
- 2. Click on the Applications tab to bring up the Applications Dashboard

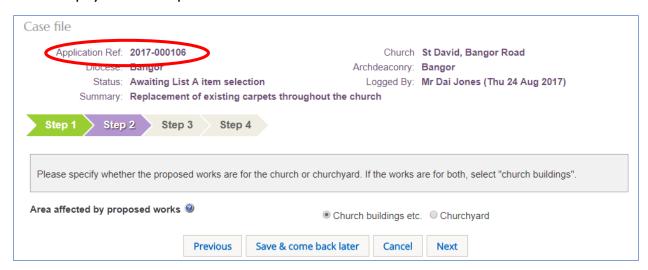


- 3. Click on the **Start a New Application** button
- 4. The Case File form opens with the **Step I** tab visible
- 5. Select the name of the church you are applying for a faculty for from the drop-down **Church** list
- 6. Enter a brief summary of the work (no more than 10 words) in the **Summary of Proposed Works** text box
- 7. Enter a contact telephone number in the **Contact Number** text box



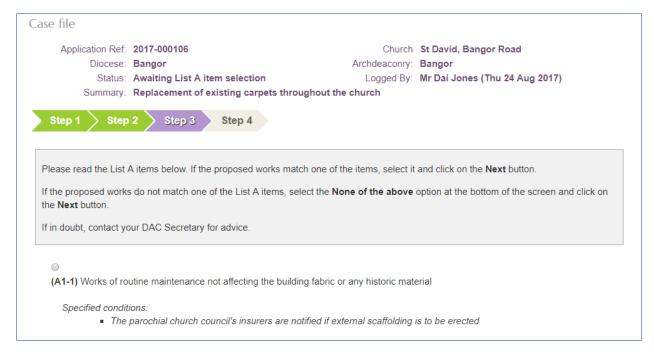
- 8. Click on the **Next** button or the **Step 2** tab
- 9. The **Step 2** tab is visible

A unique reference number is automatically assigned to each application by the OFS at this stage. This is displayed at the top of the screen.



10. Choose whether the works you are proposing are for the church or churchyard If the works are for both, then select church. If in doubt, speak to your DAC Secretary.

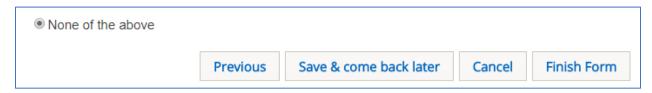
- 11. Click on the Next button or the Step 3 tab
- 12. The **Step 3** tab is visible showing the List A items



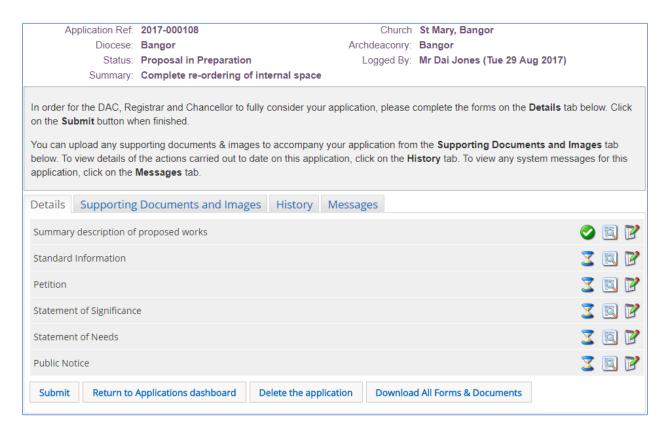
13. Scroll down to the bottom of the screen and select the "None of the above" option



- 14. Click on the **Next** button or the **Step** 4 tab
- 15. The **Step 4** tab is visible showing the List B items
- 16. Scroll down to the bottom of the screen again and select the "None of the above" option
- 17. Click on the Finish Form button



18. The **Details** screen is displayed showing the forms required for a full faculty application



The Summary Description of Proposed Works form (the Case File) shows as completed (green tick). This contains the information you previously entered in Step I of the Case File. All the other forms show as a work-in-progress (egg-timer) ie. they need completing.

The **Edit Details** button is also displayed (note pad & pen) next to the forms, indicating that they can still be edited before the **Submit** button is clicked.

Completing the Standard Information Form

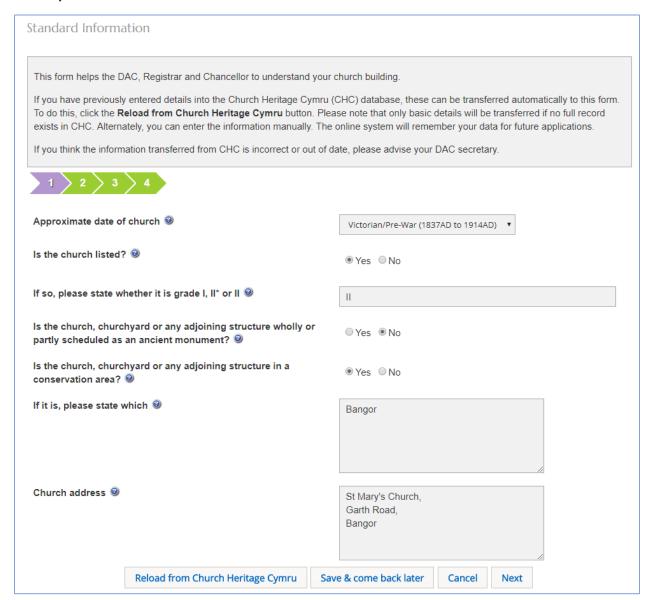
The Standard Information form allows you to record some basic information about your church such as whether it is listed (and if so, what grade), in a conservation area and/or national park and whether there any other listed structures or scheduled monuments in the church or churchyard.

If this information already exists in Church Heritage Cymru (the Church in Wales' church records database), you can transfer it automatically into the *Standard Information* form. Alternately, you can enter the information manually.

The OFS will also remember the information you have entered in this form for future applications.

- 1. From the **Details** screen, open the *Standard Information* form by clicking on the **Edit Details** button
- 2. Step I of the Standard Information form is displayed

3. If you want to populate the Standard Information form from the Church Heritage Cymru (CHC) database, click on the **Reload from Church Heritage Cymru** button, otherwise enter the church details yourself



The **Reload from Church Heritage Cymru** button populates Steps I to 3 of the *Standard Information* form if the information already exists in the CHC. However, remember to check the information is up-to-date and if not, enter it yourself.

If you don't have the information to hand, you can always click on the **Save and Come Back Later** button. The Standard Information form will retain any information you have already entered so that when you open it again, you can start where you left off last time.

- 4. Enter your information and then click on the **Next** button or the **Step 2** tab
- 5. The **Step 2** tab is visible



6. Enter your information and then click on the **Next** button or **Step 3** tab

You do not have to answer every question if they are not appropriate for your church. Either leave blank or enter "not applicable" or "N/A".

7. The **Step 3** tab is visible

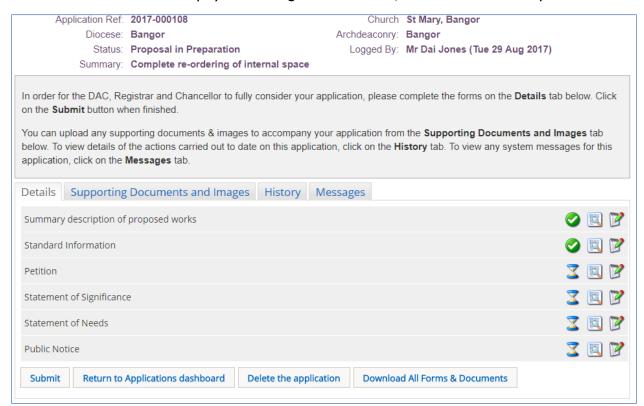


- 8. Enter your information and then click on the **Next** button or **Step 4** tab
- 9. The **Step 4** tab is visible



10. Enter your information and then click on the Finish Form button

11. The **Details** screen is displayed showing the Standard Information form as complete

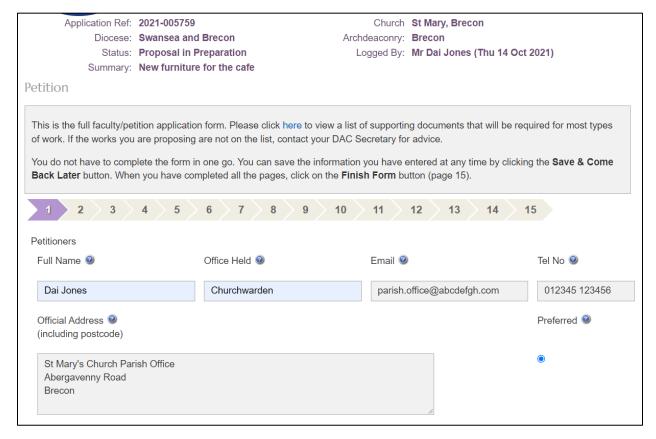


Although the Standard Information form is now complete (as indicated by the green tick next to it), it can still be edited before the application is submitted. To edit or change any of the previously entered information, click on the **Edit Details** button (notepad and pen) and the form will reopen.

Completing the Petition Form

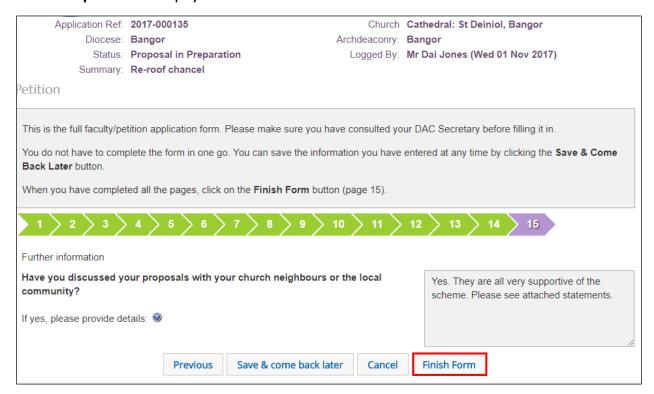
The *Petition* form is where the majority of the information needed for a full faculty application is entered. It consists of a series of online screens which should be filled in as comprehensively as possible, although supporting documentation and photographs can also be uploaded (go to page 17 for guidance on how to do this). If you don't have the information to hand, you can always click on the **Save and Come Back Later** button, which is located at the bottom of each screen. Any information you have entered will be retained. You can then re-open and complete the form later. The form will not show as complete (green tick) until you have worked through all the online screens (tabs) and clicked the **Finish Form** button on the final screen (tab).

- 1. From the **Details** screen, open the *Petition* form by clicking on the **Edit Details** button
- 2. The Step I tab is displayed
- 3. Enter your name, office held and the church/vicarage/MA official address and telephone number. Do not enter your personal email or home address as the form will be in the public domain. Click on the **Next** button or the **Step 2** tab

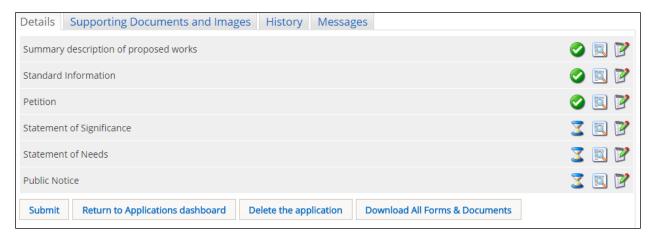


- 4. The **Step 2** tab is visible
- 5. Complete all the steps/tabs in the online form

6. The Step 15 tab is displayed



- 7. Click on the Finish Form button to complete the Petition form
- 8. The Details screen is displayed showing the Petition form as complete



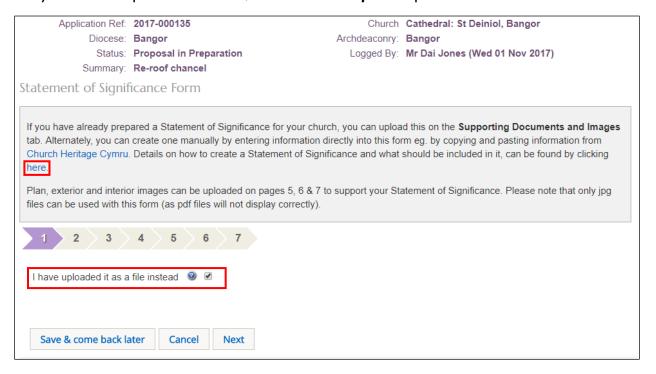
Although the *Petition* form is now complete (as indicated by the green tick next to it), it can still be edited before the application is submitted. To edit or change any of the previously entered information, click on the *Edit Details* button and the form will re-open.

Completing the Statement of Significance Form

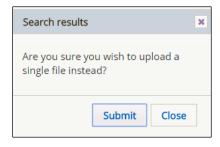
All full faculty applications need to include a *Statement of Significance*. The amount of information and detail you include in the *Statement* will depend on the type of work you are proposing to do. For example, a large re-ordering project will need to include a lot more information than a replacement kitchen in a vestry. Your DAC Secretary will be able to advise what should be included and the level of detail required in your *Statement of Significance*. There is also a link in the Information box at the top of the *Statement of Significance* screen to a guidance note on this topic.

You have two options for including a Statement of Significance with your faculty application; upload a previously prepared document or complete a Statement of Significance form.

- I. From the **Details** screen, open the **Statement of Significance** form by clicking on the **Edit Details** button
- 2. The Step I tab is displayed
- 3. If you want to upload a Statement, select the File Upload option



4. An **Upload Confirmation** box is displayed



- 5. Click on the Submit button
- 6. You will be returned to the **Details** tab

Note: You will still need to upload your *Statement* on the **Supporting Documents and Images** tab. Go to page 17 for information on how to do this.

- 7. If you want to complete the online *Statement of Significance* form, do not select the *File Upload* option, but click on the *Next* button or the *Step 2* tab
- 8. The Brief History and Description text box is displayed
- 9. Enter your information then click on the **Next** button or **Step 3** tab
- 10. The **Step 3** tab is visible
- II. Complete all the steps/tabs in the online form
- 12. The **Step 7** tab is displayed



- 13. Click on the *Finish Form* button to complete the *Statement of Significance* form
- 14. The Details screen is displayed showing the Statement of Significance form as complete

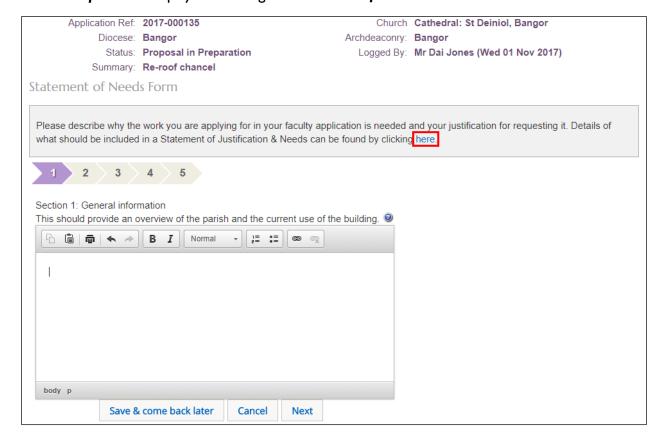


Although the *Statement of Significance* form is now complete (as indicated by the green tick next to it), it can still be edited before the application is submitted. To edit or change any of the previously entered information, click on the *Edit Details* button and the form will re-open.

Completing the Statement of Needs Form

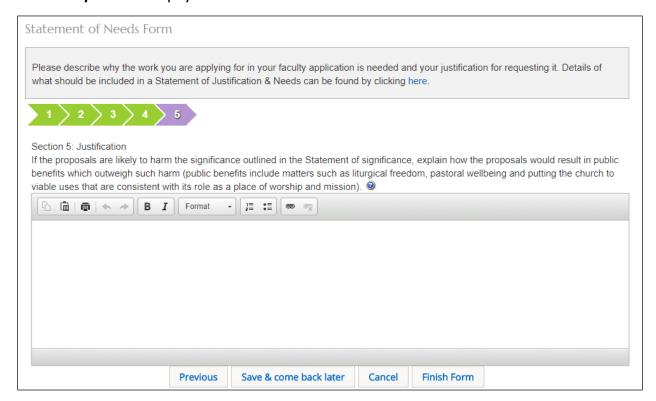
All full faculty applications need to include a *Statement of Needs* (also known as a *Statement of Justification*). The amount of information and detail you include in the *Statement* will depend on the type of work that you are proposing to do. For example, an extension to the church will need to include a lot more information than that needed for the refurbishment of a meeting room. Your DAC Secretary will be able to advise what should be included and the level of detail required in your *Statement of Needs*. There is also a link in the Information box at the top of the *Statement of Needs* screen to a guidance note on this topic.

- 1. From the **Details** screen, open the **Statement** of **Needs** form by clicking on the **Edit Details** button
- 2. The **Step I** tab is displayed showing the **General Information** text box

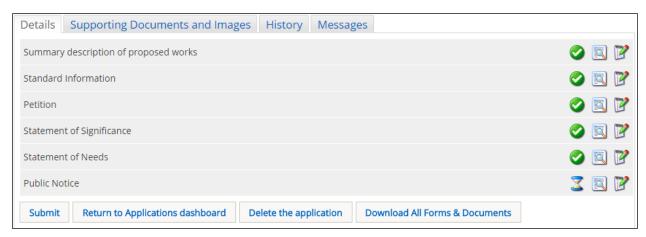


- 3. Enter your information then click on the Next button or Step 2 tab
- 4. The **Step 2** tab is visible
- 5. Complete all the steps/tabs in the online form

6. The **Step 5** tab is displayed



- 7. Click on the *Finish Form* button to complete the *Statement of Needs* form
- 8. The Details screen is displayed showing the Statement of Needs form as complete

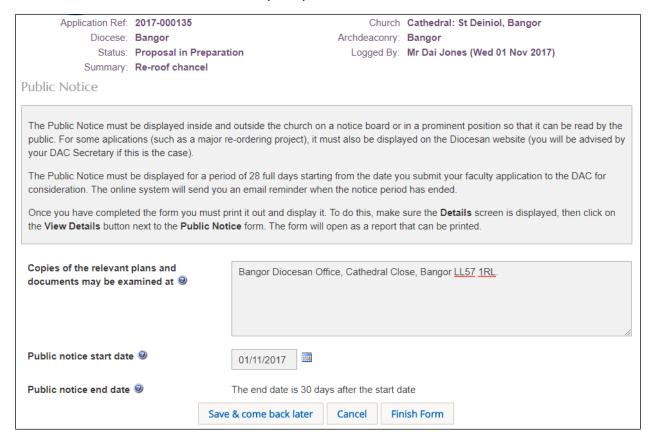


Although the *Statement of Needs* form is now complete (as indicated by the green tick next to it), it can still be edited before the application is submitted. To edit or change any of the previously entered information, click on the *Edit Details* button and the form will re-open.

Completing the Public Notice Form

All full faculty applications need to be accompanied by a *Public Notice* (previously known as a *Form* 2) which is displayed outside the church (usually on a notice board). The *Notice* outlines the faculty proposals and gives the general public the opportunity to comment on them via the Diocesan Registrar. Any comments will be taken into account when the Diocesan Chancellor makes his/her determination on the grant or refusal of faculty. Although the *Notice* is completed online, it will still need to be printed out and displayed.

- 1. From the **Details** screen, open the *Public Notice* form by clicking on the **Edit Details** button
- 2. The Public Notice form is displayed
- 3. Enter the address where details of your proposal may be examined by the public. For example, this could be at the church itself (in which case opening hours should also be given), the Diocesan Office or the Parish office. Do not use your personal address.

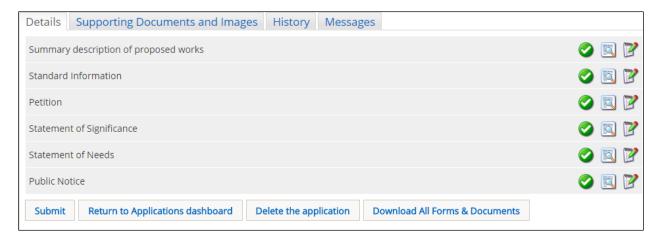


- 4. Set the Public Notice start date (the end date is automatically set by the system)
- 5. Click on the *Finish Form* button to complete the *Public Notice* form
- 6. A pop-up reminder to display the Public Notice form is dsipalyed



7. Click on the **OK** button

8. The **Details** screen is displayed showing the *Public Notice* form as complete



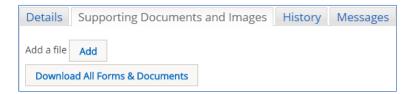
Although the *Public Notice* form is now complete (as indicated by the green tick next to it), it can still be edited before the application is submitted. To edit or change any of the previously entered information, click on the *Edit Details* button and the form will re-open.

Note: Before submitting your application, you should check whether you need to upload any supporting documents and images. See below for information on how to do this. You may also want to print or download/save the whole application or parts of it. If so, see page 19. If you want to submit your application, go to page 22.

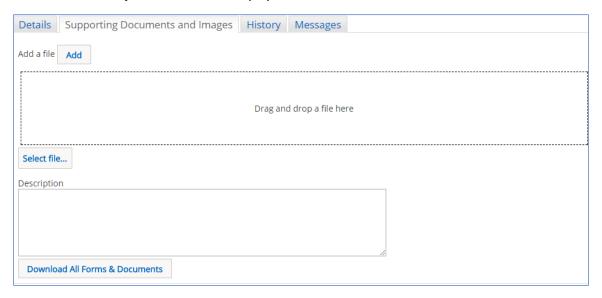
Uploading Supporting Documents and Images

You can upload extra information (eg. plans, documents, photographs, etc) to support your faculty application. This will help the DAC, Registrar, Chancellor and external consultees to better understand your application. It can also reduce the amount of information you need to enter in the *Petition* form, as you can refer to the uploaded documents rather than describing their contents in detail. You can upload supporting documents at any stage *before* you click on the *Submit* button.

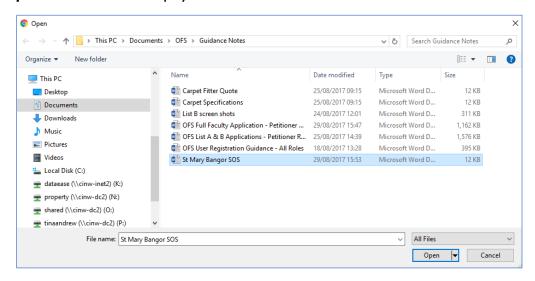
- 1. Click on the **Supporting Documents and Images** tab
- 2. The Add button is displayed



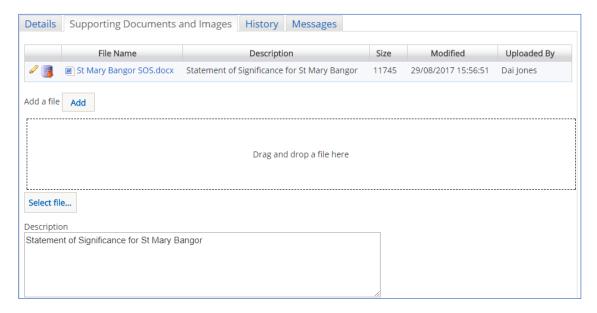
- 3. Click on the Add button
- 4. The **Document Upload** screen is displayed



- 5. Click on the **Select File** button
- 6. The **Open File** window is displayed



- 7. Select the file that you want to upload (only one can be uploaded at a time) then click on the **Open** button
- 8. The file name is now visible in the **Document Upload** screen
- 9. Enter a description for the file in the **Description** text box then click on the **Upload** button



- 10. The uploaded file is now visible on the File Name list
- 11. Repeat the above steps as required to add more files

The description of the file can be changed by clicking on the **Edit** button (pencil). It can also be downloaded by clicking on the **Download** button (red arrow).

Files can also be uploaded via the drag & drop facility.

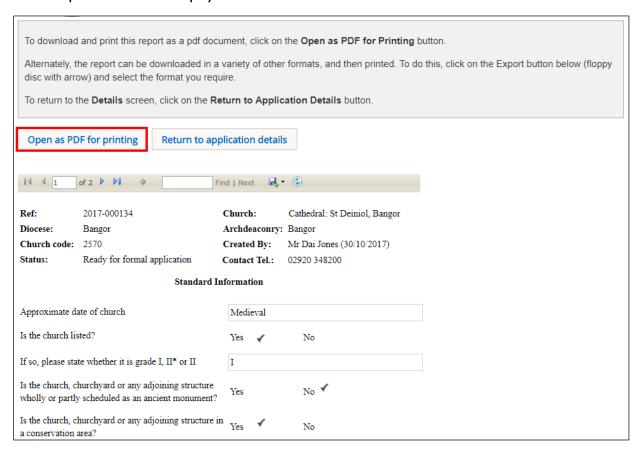
12. When you have finished uploading any documents or images, click on the **Details** tab to return to your application

Printing and Downloading an Application

1. To view or print forms from the application, click on any of the View Details buttons

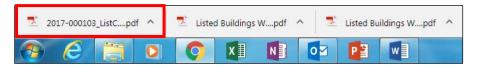


2. The report window is displayed



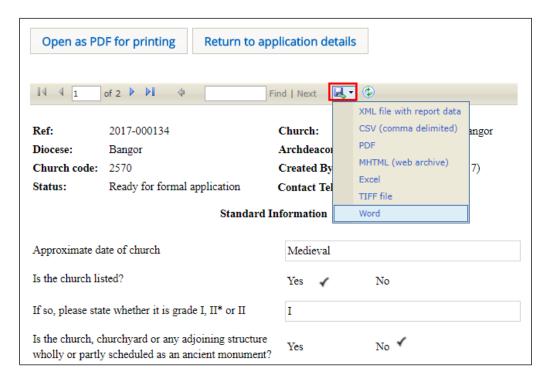
3. Click on the **Open as PDF for printing** button

The report is downloaded to the status bar at the bottom of the screen (and to the Downloads folder on your laptop/PC), although this step may depend on how your laptop/PC has been set up.



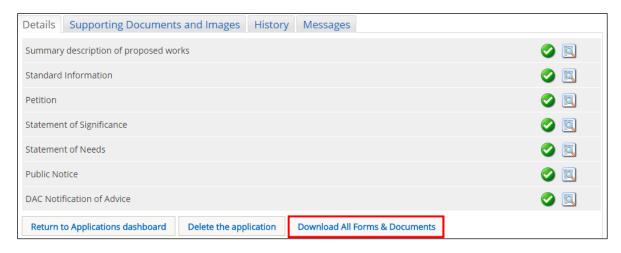
Clicking on the downloaded report will open it in Adobe Acrobat where it can be viewed, saved and printed in the normal way.

4. Alternately, you download the report in a variety of other formats by clicking on the **Export** drop-down menu



The report is downloaded to the status bar at the bottom of the screen. Clicking on it will open it, where it can be viewed, saved and printed in the normal way.

- 5. Click on the **Return to Application Details** button to return to the **Details** screen
- 6. If you want to save/print all forms and documents associated with your application in one go, click on the **Download all Forms & Documents** button



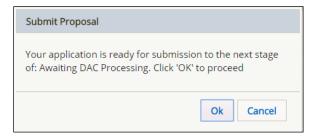
A zip file containing all the forms & documents is downloaded to the status bar at the bottom of the screen (and to the Downloads folder on your laptop/PC), although this step may depend on how your laptop/PC has been set up. Clicking on the zip file will open it to display all the individual files.



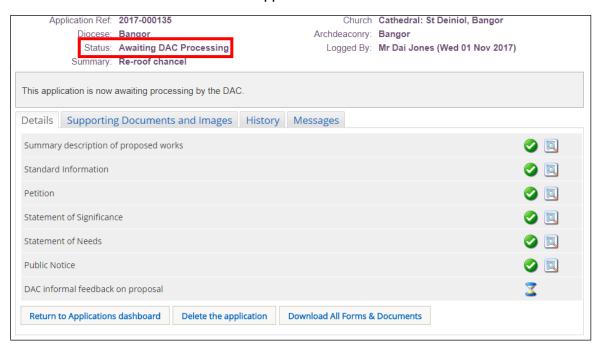
Submitting the Application

Prior to submitting your application, you should check it through thoroughly as it cannot be edited after the **Submit** button has been clicked (unless it is returned to you for revision by the DAC Secretary). Therefore, make sure you have uploaded any supporting documents and images that are required for your application eg. PCC minutes, architect's plans, photographs, etc. You may also want to download or print any of the online forms for your own records, although the OFS will retain all this information as part of the faculty application.

- 1. From the **Details** screen, click on the **Submit** button
- 2. A **Submit Proposal** pop-up box is displayed



3. Click on the **OK** button to submit the application



Once the application has been submitted, its status will change from "Proposal in Preparation" to "Awaiting DAC Processing", which indicates it has been successfully submitted and is now at the next stage of the faculty process. The previously completed forms are no longer editable by the Applicant/Petitioner.

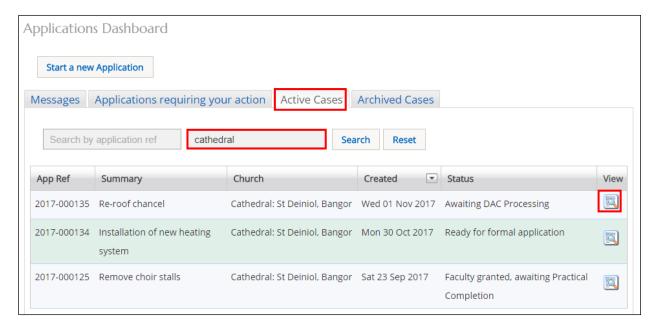
A new form, DAC Informal Feedback on Proposal, is now visible on the **Details** screen with an egg-timer next to it. This form is waiting to be completed by the DAC Secretary and is not editable

by the Applicant/Petitioner (ie. no **Edit Details** button is visible next to it). The Information box at the top of the screen also reflects the change in status of the application.

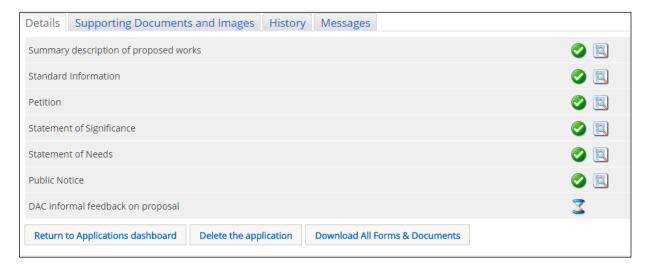
The Applications Dashboard

In addition to starting a new faculty application, you can also use the **Applications Dashboard** to view and manage other active (live) and archived (completed) applications and system messages.

- I. Sign in to the OFS/CHC
- 2. Click on the Applications tab
- 3. The **Applications Dashboard** is displayed
- 4. To view a list of all active applications, click on the Active Cases tab
- 5. To filter the list, enter a *church name* or *application number* in the two search boxes, then click on the **Search** button

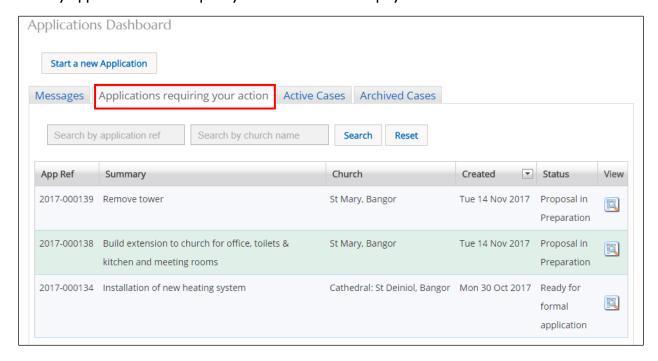


- 6. To view a list of all completed (archived) applications, click on the **Archived Cases** tab
- 7. To view the forms and supporting documents for an individual application, click on the **View this Application** button
- 8. The **Details** screen is displayed showing all the forms associated with that application



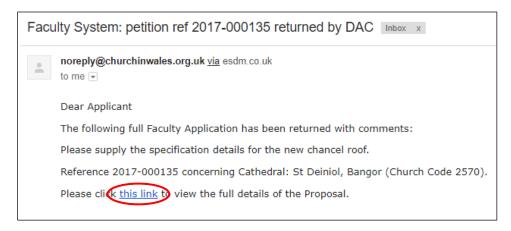
See earlier sections of this guidance for details on how to view forms and print and download supporting documents.

- 10. Click on the **Return to Applications Dashboard** button to return to the **Applications Dashboard**
- II. To see if any applications need your action, or require some input, click on the **Applications Requiring Your Action** tab
- 12. Any applications that require your action will be displayed



This is a useful tab to click on each time you sign in to the OFS to check whether any applications need your attention. For example, the DAC Secretary may have passed the application back to you to supply some further information before it can be reviewed at the next DAC meeting.

You will also be sent an email if an application needs your action. If this is the case, you can either sign in to the OFS and click on the **Applications Requiring Your Action** tab on the **Applications Dashboard**, or click on the link in the email to go to that application.



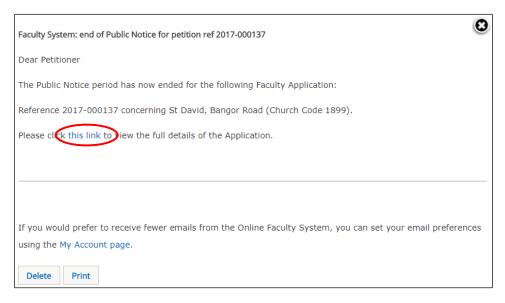
The OFS stores any message you have been sent via email on the **Messages** tab. Again, this is a good way to check whether an application needs your attention.

13. From the Applications Dashboard, click on the Messages tab

A list of all email messages you have received from the OFS are displayed. The list will include messages for all active and archived faculties.



- 14. To view a message, click on the View Details button
- 15. The message is displayed



- 16. To print the message, click on the **Print** button
- 18. To quickly go to the application that the message refers to, click on the link in the message
- 17. To delete the message, click on the **Delete** button
- 18. To close the message, click on the **X** (in the top right-hand corner)

What Happens Next

The DAC Secretary will review your application to make sure that all relevant details have been recorded and all supporting documentation is in order. If extra information is required, you will be contacted to supply this. He/she may also pass the application back to you so that you can edit the previously completed forms or upload extra supporting documents. If this is the case, you will receive an email from the OFS advising you that the application needs your attention and it will again become a "proposal in preparation" so that you can make your changes and re-submit.

Once the DAC Secretary is satisfied that the application is in order, it will be reviewed at the next DAC meeting. In some cases, it will also be reviewed by external consultees, such as the amenity societies (eg. Victorian Society, Georgian Group, etc) or local authority. After this, it will either be returned to you to supply further information or passed to the Diocesan Registrar to check that it complies with the Church in Wales' Constitution rules. If the application is passed back to you, it will again become a "proposal in preparation" which can be re-submitted after you have supplied the required information. If it is passed to the Registrar and he/she is satisfied that everything is in order, it will be passed on to the Diocesan Chancellor for determination.

You can check how your application is proceeding at any time by logging onto the OFS and checking its status. Also make sure that you check your email regularly as the OFS will send out messages to alert you to any action that is required by you in relation to your application. The email alerts are also recorded on the **Messages** tab within the OFS.

Tina Andrew Church Conservation & Support Manager The Church in Wales 25th November 2021