



The Presbyterian Synod of Otago and Southland

level 5, Evan Parry House, Princes St, Dunedin 9054 | www.synod.org.nz

For Synod use only
2015

Executive Officer: Fergus Sime, Level 5, Evan Parry House, 43 Princes St, PO Box 1131, Dunedin 9054
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Charities Commission Registration Number CC33597

Application for allocation of income from the Ecclesiastical Fund

for building replacement or alteration projects

Send this form to Synod Executive Officer, P O Box 1131, Dunedin 9054 by 15 October

Please read these notes first:

- Please contact the Synod Executive Officer for assistance in completing this form.
- A separate application form is required for each building (even if it is linked to another).
- Applications will be assessed in terms of the extent to which this building has the potential to facilitate the strategic mission of the Church in the region.
- Priority will be given to:
 1. upgrade/expansion of buildings which are well used, have a thriving community mission focus, and have been identified as strategic assets.
 2. Upgrade of manses to ensure a reasonable standard of accommodation for the minister.
- Routine maintenance and repairs are no longer considered a Synod funding priority.
- Projects costing under \$2,000 (i.e. applications for less than \$1,000) will not be considered.
- ***Please Do forward the latest annual financial report and any other relevant documents.***
- ***Please Do not forward invoices or items needed to claim an allocation if approved.***

The applicant

Parish/Camp _____
contact person _____ cellphone _____
phone (03) _____ email _____
contact address _____

The application

Full project cost \$ _____ (round all figures nearest \$1,000)
Total Cost

Total applied for @ 50% of cost: \$ _____ @ 50% = \$ _____

Total applied for @ 25% of cost: \$ _____ @ 25% = \$ _____

Building:

Location:

Type of project: ☐ erect building ☐ purchase land ☐ purchase building ☐ extensions ☐ alterations
☐ maintenance ☐ other (specify)

Summarise the work eligible for a Synod allocation:

see eligibility guidelines page 6

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The building

How will (has) the work done to this building enhance(d) the mission of the Church?

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.....
.....

Estimated current (or projected) use of this building (hours per month) (If application is for a Manse give figures for all church buildings in Parish)

for a church: - for worship services: - average attendance:

- for other purposes: - distance to nearest other Presbyterian Church:km

for a hall: - by parish groups: - by non-parish groups (fee paying):

- by non-parish groups (free of charge):

project progress: ☐ completed ☐ in progress ☐ at planning stage

existing building: How old is it? Remaining life expectancy?

Recent history of Synod allocations for this building (or one it is to replace):

2008	2009	2010	2011	2012	2013	2014	Total
\$	\$	\$	\$	\$	\$	\$	\$

If you have sold parish buildings in the last 10 years:

Name of building(s)

What was the net surplus from this sale(s)? \$

What were the sale proceeds used for?

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If invested, where are these funds held?.....

Proceeds from the sale of other property may be taken into account when making allocations

Financial Responsibilities

▪ Assembly Assessment (or Joint Ministry Fund) for last year:

Due \$ Paid: \$

▪ If you paid less than 100% last year, why?

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.....

▪ Are you on track to meet this year's Assessment? ☐ Yes ☐ No

▪ If not, why not?

Have you sent a letter in advance of this Application to the Synod Executive Officer alerting the Ecclesiastical Fund to your major project coming up? ☐ Yes ☐ No

Funding the project

What cash do you have available for this project? \$

How much has been pledged by completion? \$

What is the market value of property yet to be sold? \$

How much do you plan to borrow? \$

Total \$

Other investment funds held: \$ Why are they not being used for this project?

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If these funds are 'tagged' for other purposes, could they be 'untagged'? ☐ Yes ☐ No

If not, why not?

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The Property

Address of property:

Certificate of Title number:

If the property is already owned:

- Who is it insured with? Sum Insured \$
- Is this full replacement Insurance? Yes/No. (Synod rules require this for major building projects.)
- What is the date of the last replacement insurance valuation report? ____/____/____
- Name of Registered Valuer that prepared the report
- If it is mortgaged, what is the balance owing? \$
- In whose name is the title held? ☐ Otago Foundation Trust Board ☐ Deacons' Court
- Please supply a copy of a recent Structural Engineer's Report to establish the application is worth funding

from a structural and earthquake point of view.

If you plan to purchase a property:

Legal description: Lot section block Area m²

Rating valuation: Land: \$

Independent valuation: Land \$

Improvements: \$

Improvements: \$

Building rationalisation

Parishes contemplating significant expenditure on buildings (new or existing) are expected to consult neighbouring congregations on the future joint use of such buildings, and the possible linking or amalgamation of parishes. To what extent has your parish done this, and what was the outcome?

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Funds Held by the Church/Campsite/Organisation

From your latest Annual Statement of Financial Position or Balance Sheet that is attached please detail below the funds held into the following categories: (attach separate page(s) if required) Note: The total of categories A – D should equal total funds held.

A. Funds given or raised for a specific purpose. The purpose has been specified by the donor (e.g. for a particular building, outreach work, Sunday School, overseas mission) or a fundraising venture where the use of the money is specified and publically stated prior to the money being received.

<u>Fund Name</u>	<u>\$</u>	<u>Specific Purpose</u>
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B. Funds held from the Sale of Property. These figures are to exclude capitalised interest received on these funds.

<u>Fund Name</u>	<u>\$</u>	<u>Name of Property</u>
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C. Funds given specific designation by Deacons' Court/Board of Managers/Parish Council. These are funds that the church court has decided to designate for a particular purpose e.g. a bequest is received for the general purposes of the church and the church court decides to put the money in a building fund or a percentage of general funds money is put into a building fund by a decision of the church court.

<u>Fund Name</u>	<u>\$</u>	<u>Original Source</u>
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D. General Funds. These funds are available for any purpose. E.g. This includes capitalised interest received on Sale of Property Funds, bequests for general purposes and General Funds.

<u>Fund Name</u>	<u>\$</u>
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Have you completed ALL sections and provided ALL information requested on All 5 pages above?
If you haven't, the Synod Executive Officer will contact you to seek the missed information.

This section to be completed by Presbytery

1. How would you rate this building on the continuum below for receiving a Synod allocation? Place an X on the line below where it is appropriate.

I.....I
Not Worth funding Essential to fund

2. Why have you given this rating?

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.....

3. How would you rate the strategic importance of this particular building project? Why?

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.....

Signed Presbytery Executive Officer ... / ... / ...

Guidelines for calculating applications

The regulations on which these guidelines are based are found in PCANZ Book of Order Appendix E 32, and Synod's Regulations and Procedures booklet. Please also refer to the priorities listed on page 1 of this form.

Allocations are made primarily for the purchase, construction or repair and maintenance of buildings used for religious purposes, but not for the contents of these buildings, nor for the maintenance of the grounds on which the buildings sit.

Land purchases can also be applied for up to 100% of purchase price.

Allocations are announced at the Annual Meeting of Synod, in April. Successful applicants will be required to supply original invoices in support of a claim. (Photocopies are not acceptable.) You will have two years in which to uplift an allocation.

Extensions can be applied for.

Maintenance is defined as physical repairs to a building, but not to chattels. Up to 50% of the cost of a project may be claimed, but some components of the work may not be eligible, or qualify for only 25%.

Eligible work includes that done by builder, plasterer, roofing contractor etc to the structure of a building, painting & wallpapering (interior and exterior), electrical work on the building (but not on equipment), plumbing and sewerage system repairs.

You may not generally claim for purchase or repair of equipment, fittings and furnishings e.g. whiteware, portable heating units, musical instruments (including organs), audio visual equipment (including sound systems), seating (including pews) and other furniture, furnishings (including curtains), office equipment & machinery, mail boxes, internal and boundary fences.

Exceptions to the above: the following may be allocated up to 25% of costs, but are given low priority

- fitted floor coverings, fixed heating units, commercial dishwashers
- professional fees for architects, structural engineers, resource consents etc for major projects

Ineligible buildings

If a manse is being used by anyone other than the parish minister, it does not qualify for an allocation.

(If you plan to lease out your manse between ministers, the work done to bring it up to standard before a tenancy is eligible, but work done at the end of a tenancy, prior to the next minister moving in, is not.)

Voluntary labour may be included at a nominal rate of \$10 per hour. Calculated @ 50% i.e. claim \$5.00 per hour. (A signed register must be kept.)

- ▶ Don't include routine 'housekeeping' items e.g. replacing light bulbs
- ▶ Don't include costs for projects or buildings other than the one for which you are applying
- ▶ Don't expect favourable consideration if your parish has not met its national financial obligations

September 2014