

# Synod of Otago & Southland

PRESBYTERIAN CHURCH OF AOTEAROA NEW ZEALAND

for Synod use only  
2012

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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 the Presbytery Clerk, P O Box 58, Invercargill 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 \_\_\_\_\_ position \_\_\_\_\_  
 contact address \_\_\_\_\_  
 phone (03) \_\_\_\_\_ email \_\_\_\_\_

**The application**

Full project cost \$ _____	<i>(round all figures nearest \$1,000)</i>
Total Cost	
Total applied for @ 50% of cost: \$ _____	@ 50% = \$ _____
Total applied for @ 25% of cost: \$ _____	@ 25% = \$ _____
<b>Total allocation applied for: \$ _____</b>	

**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*  
 .....  
 .....  
 .....

**The building**

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

.....  
 .....  
 .....

Estimated current (or projected) use of this building (hours per month)

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):

2005	2006	2007	2008	2009	2010	2011	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? .....

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? .....

▪ 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 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?

.....  
.....  
.....

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

If not, why not? .....

.....

**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

If you plan to purchase a property:

Legal description: Lot ..... section ..... block ..... Area ..... m<sup>2</sup>

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?.....

.....  
.....  
.....  
.....

## 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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**This section to be completed by Presbytery's Property Committee**

**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?**

.....  
.....  
.....

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

.....  
.....

**Signed** ..... **Property Committee Convener** ... / ... / ...

**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.**

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.

**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