Executive Officer: Fergus Sime, Level 5, Evan Parry House, 43 Princes St, PO Box 1131, Dunedin 9054

phone: 03 477 7365 or 0800 76 22 22 fax: 03 477 6736 email: synod.otago.southland@xtra.co.nz

Charities Commission Registration Number CC52209

**Application for allocation of income**

**from the Ecclesiastical Fund**

**for applications above $25,000 (or total payments above $50,000)**

***Send this form to Synod* *Executive Officer, P O Box 1131, Dunedin 9054 or by email 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 considered a lower funding priority.
* ***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**

 Gross Total applied for requesting 50% subsidy of costs: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ @ 50% = $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (Including voluntary labour if applicable)

 Gross Total applied for requesting 25% subsidy of cost: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ @ 25% = $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Total Gross Total of 50% and 25% subsidy items $**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

 **Total allocation applied for: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**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 7***

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1

**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) (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):

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **2016****$** | **2017****$** | **2018****$** | **2019****$** | **2020****$** | **2021****$** | **2022****$** | **Total****$** |

**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? ………………………………………………………………………………………………**

2

**Have you sent a letter in advance of this Application to the Synod Executive Officer alerting the Ecclesiastical Fund to your major project (over $200,000) coming up? ⬜ Yes ⬜ No**

**Which Synod staff member(s) have you consulted about this application and when?................................................./…../…….**

**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**

 **- 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: $ ………………..**

 **Improvements: $ …………………**

**Building rationalisation**

Have there been consultations with neighbouring churches where that is appropriate? yes / no.

If *no*, why not? ………………………………………………………………………………………

If *yes*, what was the outcome? …………………………………………………………………………………

………………………………………………………………………………………………………………………………………………………………………………………………

3

**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.**

**Fund Name $ Specific Purpose**

**B. Funds held from the Sale of Property. These figures are to *exclude* capitalised interest received on these funds.**

**Fund Name $ Name of Property**

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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.**

**Fund Name $ Original Source**

**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.**

**Fund Name $**

**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.**

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**This section to be completed by Synod Staff**

**From your experience of the parish/campsite and the neighbouring area around, what comments would you like to make to the Committee that may assist them in their decision making?**

**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?**

………………………………………………………………………………………………………………………………………………………………………………………………

………………………………….………..…………………………………………………………………………………………………………………………………………………

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

………………………………………………………………………………………………………………………………………………………………………………………………

………………………………………………………………………………………………………………………………………………………………………………………………

**Signed ………………………………………… Presbytery Executive Officer … / … / …**

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**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 decided 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. Also professional fees for architects, structural engineers, resource consents etc for major projects.

**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

**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

February 2020

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