# Synod Grants and Financial Assistance Policy

## 1 Purpose

The purpose of the Synod Grants and Financial Assistance Policy (**the Policy**) is to establish consistent framework for the establishment, administration, assessment, approval, monitoring and evaluation of grants and other financial assistance programs, funded or coordinated by the Synod.

The Policy aims to:

- ensure grants and financial assistance support the mission, values and strategic priorities of the Synod;
- promote fairness, transparency, consistency, and accountability;
- support responsible stewardship of Church resources;
- ensure equitable and consistent decision-making;
- establish minimum requirements applicable to all Synod grant and financial assistance programs.

## 2 Scope

This Policy applies to all grant and financial assistance programs funded or coordinated by the Synod, and administered via Synod Ministries and Operations (**SMO**) staff, including the below.

- Synod Mission Grants Program as overseen by the Mission Grants Committee (**MGC**) – including below grant types:
    - Camping and temporary community grants;
    - Small mission grants; and
    - Ministry and mission program grants.
- Education, scholarship and bursary programs, including overseen by the Pilgrim Faculty Committee.
- Synod Emission Reduction Fund (**SERF**) grants.
- Synod funding support for property projects overseen by Property Application review Team (**PART**) – including:
    - Capital works fundings (general and emergency);
    - Disability upgrade support funding;
    - Heritage building support funding; and
    - Essential safety measures support funding.
- Emergency stipend assistance overseen by the Associate General Secretary.
- Any future funding programs established by Synod committees, executives or work areas.

The Policy does not apply to:

- Direct Synod funding to presbyteries, assembly, or Uniting Aboriginal & Islander Christian Congress (**UAICC**). This funding is sometimes referred to as ‘block grants’;
- Financial assistance administered via the Pastoral Assistance Committee;

- Funding programs administered and funded directly by other councils of the Church, including presbyteries and congregations;
- Funding for activities from special purpose trusts administered via the Property Trust Secretary that are not utilised via a specific Synod funding program; or
- Administration of Pilgrim grants by the University of Divinity, however elements of Synod's involvement should align to this policy and guiding principles.

# 3 Policy statement

The Synod supports wider Church mission and ministry initiatives and, where funding is available, is committed to providing equitable funding programs to support such initiatives where there is insufficient local funding available.

The Synod will only provide grants and financial assistance where doing so:

- advances the mission and strategic priorities of the Church;
- delivers public, missional, educational, community or organisational benefit;
- represents responsible stewardship of available resources;
- complies with legal, fiduciary and trust obligations; and
- can be administered and monitored appropriately.

# 4 Funding Program Administration Principles

The Synod adopts the following principles for its funding programs.

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| **Missional alignment** | • Funding should contribute to the mission, ministry, witness or service objectives of the Church. |
| **Stewardship** | • Funds are a finite resource and must be used responsibly to maximise mission impact and long-term sustainability. |
| **Equity and fair access** | • Eligible applicants should have a fair opportunity to access funding. |
| **Transparency** | • Funding programs, criteria and decision-making processes should be documented and communicated openly. |
| **Merit-based assessment** | • Applications should be assessed against published criteria and not by personal preference or historical practice. |
| **Accountability** | • Recipients must be accountable for the use of funds and achievement of intended outcomes. |
| **Proportionality** | • End-to-end administrative requirements should be proportionate to the amount and risk of the funding. |
| **Conflict of interest management** | • Actual, potential and perceived conflicts of interest must be declared and managed. |
| **Sustainability** | • Funding decisions should consider long-term financial sustainability and avoid creating unsustainable funding dependencies. |

# 5 Key roles and responsibilities

The table below summarises the key roles and responsibilities in relation to this Policy.

| Role | Responsibilities |
|---|---|
| **Synod Standing Committee (SSC)** | • Establish and maintain relevant policies.<br>• Ensure funding programs remain aligned with the Synod's mission, strategic objectives and risk appetite.<br>• Exercise, or appropriately delegate, oversight of committees responsible for administering funding programs. |
| **Ministry and Mission Committee (M&M)** | • Provide strategic oversight of mission related grant programs supporting mission and ministry outcomes.<br>• Monitor the effectiveness of grant programs in achieving intended ministry and mission outcomes. |
| **Property and Operations Committee (P&O)** | • Provide strategic oversight of financial assistance programs related to real property. |
| **Bodies/roles that oversight the administration of grant programs**<br>*Mission Grants Committee (**MGC**)*<br>*Educational Grants and Scholarships Committee*<br>*Property Application Review Team (**PART**)*<br>*Associate General Secretary (**AGS**)* | • Recommend funding priorities and annual spend for programs for approval by the appropriate authority.<br>• Govern funding programs in accordance with this Policy and any approved program guidelines.<br>• Develop and periodically review program-specific guidelines, eligibility criteria and assessment processes.<br>• Oversee end-to-end processes from application to acquittal.<br>• Approve applications within delegated authority. |
| **Property Trust Officer**<br>*Also Chairperson of PART* | • Oversee distribution of funds from special purpose trusts used by funding programs, ensuring compliance with conditions of trusts.<br>• Provide operational leadership and strategic direction and for administration of Synod financial assistance for property projects. |
| **Director – Placements and Grants**<br>*Supported by SMO staff roles with responsibilities for grants* | • Provide operational leadership and strategic direction for Synod grant administration.<br>• Ensure grant programs are administered in accordance with approved policies, guidelines and delegations.<br>• Oversee the development and maintenance of grants governance documentation, including procedures, templates and guidance materials.<br>• Monitor compliance with funding conditions, reporting obligations and acquittal requirements. |
| **Presbyteries** | • Establishing required committees or bodies to facilitate presbytery level discernment and assessment of applications as required by individual programs. |
| **Grant applicants / funding recipients** | • Follow all required processes and requirements as related to grant program and conditions of funding. |

# 6 Policy requirements

## 6.1 Eligibility

### 6.1.1 General eligibility principles

Unless otherwise specified in program guidelines, grants and financial assistance may only be provided to:

- congregations (applicant must be a formal 'Church Council');
- presbyteries;
- ministry agents, or those seeking to become a ministry agent; or
- individuals undertaking education who are eligible under relevant grant.

Applicants must:

- have an identified governing body (except for programs for individual such as educational scholarships);
- demonstrate capacity to fulfil the proposed activity;
- have satisfactory financial and governance arrangements (except for programs for individual such as educational scholarships);
- be compliant with any previous funding acquittal requirements;
- agree to any reporting and evaluation requirements.

### 6.1.2 General exclusions

Unless expressly permitted within approved terms of a funding program, Synod funding programs will not fund the below.

- **Activities outside approved purposes:** activities inconsistent with the documented purpose of the program.
- **Duplicative funding:** funding of a single activity through more than one Synod funding program.
- **External third parties:** funding to external entities.
- **Legal claims:** litigation, fines, penalties or settlement costs.
- **Normal maintenance:** routine building maintenance and operational expenses unless expressly allowed under a specific funding program.
- **Ongoing operational deficits:** funding intended solely to meet recurring operational shortfalls.
- **Personal financial assistance:** direct financial assistance to individuals except where specifically allowed under scholarship, bursary or other hardship programs.
- **Private benefit:** activities that primarily benefit an individual rather than the wider Church or community. Funding for private benefit is strictly prohibited noting such funding is non-complaint under charitable trust law.
- **Related parties and institutions:** funding for related entities and institutions such as U Ethical, Uniting Vic. Tas., Uniting AgeWell, and related Schools and Colleges or other such entities.
- **Retrospective funding:** projects, activities or expenditure already incurred before approval.
- **SMO operational activities:** funding related to activities and initiatives of SMO work areas and staff. This should be funded via the Synod / SMO budget process.

## 6.2 Strategy and funding priorities

The approving body may establish annual or multi-year strategy and funding priorities for individual funding programs.

This should include consideration of below, as applicable:

- forecast capital and income funds available;
- estimated annual spend and how this is apportioned across and within different funding programs; and
- alignment to broader Synod strategy and mission priorities.

Priorities should be documented and made available to applicants, and must be reviewed periodically and approved through appropriate governance processes.

## 6.3 Governance and decision-making

The Synod will establish and document clear delegations for:

- approval of funding programs;
- approval of funding priorities;
- assessment of applications;
- approval of applications; and
- monitoring and reporting.

All funding programs must have:

- documented guidelines or terms of reference and eligibility requirements;
- documented assessment criteria;
- documented approval processes;
- conflict of interest controls; and
- documented records of decisions.

## 6.4 Recipient obligations

Recipients must:

- use funds for approved purposes;
- maintain evidence of expenditure;
- comply with conditions of funding;
- provide any required progress and acquittal reports;
- cooperate with audit or review activities; and
- return unspent funds where required.

## 6.5 Monitoring and evaluation

The Synod will monitor funding programs to ensure:

- funds are used appropriately;
- intended outcomes are achieved;
- lessons are captured for future programs;
- strategic impact is evaluated.

Evaluation requirements should be proportionate to funding amount and risk.

## 6.6 Record-keeping

The Synod will maintain complete, accurate and reliable records and data relating to the administration of funding programs using available systems and in accordance with Synod's internal policies and processes.

# 7 Definition of key terms

The table below provides definitions for key terms specific to this policy to support consistent interpretation and application.

| Term | Definition |
|---|---|
| **Acquittal** | The process by which a funding recipient demonstrates that funds have been used in accordance with the approved purpose, funding conditions and any reporting requirements. An acquittal may include financial records, evidence of expenditure, activity reports and achievement of intended outcomes. |
| **Assessment criteria** | The published requirements and factors against which applications are assessed to determine their eligibility, merit, alignment with funding objectives and suitability for funding. |
| **Evaluation** | The systematic assessment of a funded activity to determine its effectiveness, outcomes, impact, value and contribution to intended objectives. |
| **Eligibility** | The minimum requirements that an applicant, project or activity must satisfy to be considered for assessment under a funding program. |
| **Financial assistance** | Provision of funds to support an entity experiencing a specific need, hardship, emergency, compliance requirement, or other identified eligible circumstance.<br>Unlike a grant program, financial assistance is generally needs-based and may be assessed against specified eligibility criteria, on balance with funds available, rather than through a comparative or competitive grant assessment process. Compared with grants, this may be subject to less onerous reporting and acquittal requirements. |
| **Funding priorities** | The strategic areas, objectives, activities or outcomes identified by the Synod or an authorised committee as priorities for a funding program. |
| **Funding program** | Encapsulating term that includes both grant and financial assistance programs.<br>Includes the overarching governance and funding framework through which funding is administered. A funding program establishes the overall purpose, funding arrangements, governance, policies, processes and reporting requirements for a single or group of related grants / funding initiatives. |
| **Funding type** | A specific category of funding within a funding program that has its own purpose, objectives, eligibility criteria, assessment requirements, funding limits and conditions. Multiple funding types may operate under a single grant program. |

| Term | Definition |
|---|---|
| **Grant** | A financial contribution provided to an eligible recipient for an approved project, activity, program, or purpose that supports the objectives of a grant program. Grants are typically awarded through an application and assessment process and may be subject to monitoring, reporting, and acquittal requirements proportionate to the amount of funding and associated risks. A grant is not a procurement arrangement, sponsorship, loan, investment, or financial assistance payment. |

# 8 Related documents

This section provides a summary of key related documents as at the time of writing.

- Mission Grants Framework (2026)
- Synod Property Project Financial Assistance Framework (2026)
- Synod Financial Assistance for Ministry Stipend Protocol (2026)

# Document control

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| **Document Owner:** | The **Associate General Secretary**, as Executive Secretary to M&M, is responsible for the management and maintenance of this document. | | |
| **Review cycle:** | This document will be subject to formal review every **3 years**. | **Next review date:** | **October 2029** |
| **Endorsers:** | Review and endorsement is required from the following bodies:<br>- **Ministry and Mission Committee**<br>- **Property and Operations Committee** | **Approver:** | **Synod Standing Committee** |

| Version | Date | Update by | Summary of changes | Approval date |
|---|---|---|---|---|
| **1.0** | Sep 2026 | Dir. – Audit, Risk and Records Management<br>Associate General Secretary | Initial version | 10/10/2026 |

***Document management:***

- *Any minor changes made between review periods should be reflected in the above table. Only changes of a material nature will require approval by the nominated approver between formal review periods.*
- ***Note:** when reviewing this document, the reviewer should ensure the template used is still the most current template for Synod policies and procedures, as found on the Synod intranet. This document is based on the **November 2025** template as approved by the Senior Leadership Team.*