

Synod Property Works Financial Assistance Framework

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1 Purpose

The Synod Property Works Financial Assistance Framework (the **Framework**) defines the governance, decision-making, administration, monitoring and reporting arrangements for the Synod's Property Works Financial Assistance Program (**the Program**). The Framework establishes a consistent approach for assessing and administering Synod financial assistance for property projects. The framework supports the stewardship, safety, accessibility and strategic sustainability of property assets that are important to the long-term mission and ministry of the Synod in Victoria and Tasmania.

The Synod assists eligible congregations and church entities to meet the costs of compliance with Essential Safety Measures, serious safety risks, disability access and other improvements to make buildings fit-for-purpose for mission and to protect the capital asset where there is insufficient local funding available.

The Synod will only provide financial assistance where doing so:

- advances the strategic priorities of the Church;
- delivers public, missional or organisational benefit;
- supports a sustainable and safe congregation with a reasonable expected future lifetime;
- represents responsible stewardship of available resources;
- complies with legal, fiduciary and trust obligations; and
- can be administered and monitored appropriately.

The Program is intended to supplement, rather than replace, local investment in property assets. Assistance may be provided alongside approval of a property project and is generally directed towards projects where the Responsible Body has demonstrated long-term viability, the property has strategic importance to future mission and ministry, and the proposed works cannot reasonably be funded through local resources alone.

2 Scope

The Framework applies to all financial assistance for property administered and overseen by the Property Application Review team (**PART**), or any sub-committees or working groups it may delegate to.

3 Policy statement

As per the Synod Grants and Financial Assistance Policy.

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;

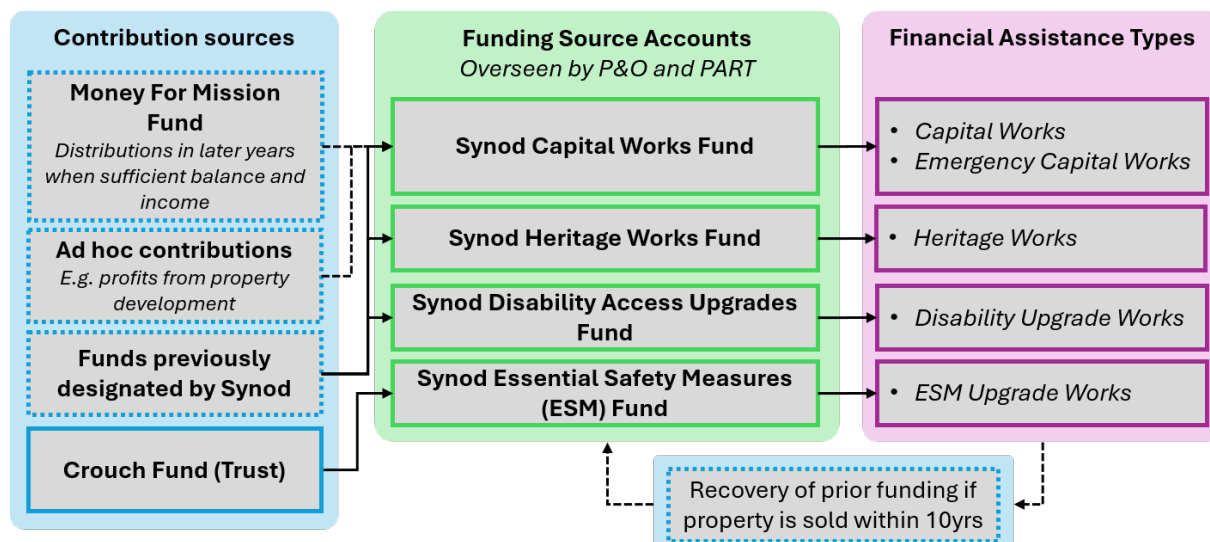
- complies with legal, fiduciary and trust obligations; and
- can be administered and monitored appropriately.

4 Key roles and responsibilities

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

Role	Responsibilities
Property and Operations Committee (P&O)	• Provide strategic oversight of the Program. • Monitor the effectiveness of the program in achieving intended outcomes. • Approve funding strategy and priorities.
Property Application Review Team (PART)	• Recommend funding priorities and annual spend budget for the Program for approval by the appropriate authorities. • Govern the Program in accordance with related Synod policy, this Framework and any approved program guidelines. • Develop and periodically review program-specific guidelines, eligibility and assessment criteria. • Oversee end-to-end financial assistance process. • Monitor funding source balances and committed funds. • Approve financial assistance allocations within delegated authority and approved budget.
Synod Property Trust Secretary	• Represent the UCA Property Trust (Victoria) and UCA Property Trust (Tas.). • Provide operational leadership and oversight of the Program. • Ensure program is administered in accordance with trust law and trustee obligations.
Director – Property Services	• Provide operational leadership and oversight of the Program. • Ensure financial assistance is administered in accordance with approved policies, guidelines and delegations.
Synod Property Services Team	• Support grant oversight committees through the provision of advice, analysis and reporting. • Develop and maintain governance documentation, including any required procedures, templates and guidance materials. • Maintain required records and data in relation to end-to-end processes. • Monitor and provide reporting on financial commitments and funding availability. • Provide communication to stakeholders and wider Church in relation to available financial assistance. • Liaise with applicants, recipients, and presbyteries as required as part of administration.
Presbyteries	• Provide presbytery level discernment and assessment of applications as part of assessment of property project application. • Provide strategic oversight and leadership in the assessment and prioritisation of applications.
Funding applicants / recipients	• Follow all required processes and requirements as related to funding requirements and conditions.

5 Program overview



5.1 General funding conditions

The below conditions apply to funding for property works.

- Property works must be coordinated by Synod Property Services.
- Funds are not paid in advance. Funds are drawn down as required to either pay the service provider directly or reimburse the UCA entity.
- Any funding provided will be recovered and returned to the issuing grant source of funds from property sale proceeds if the property is later sold within 10 years.
- Funding available for all types of financial assistance is extremely limited and will only be granted where there are sufficient funds available and proposed works cannot reasonably be funded through local resources alone. Responsible Bodies cannot expect/rely on funding being offered.
- Funding requests may be assessed (amongst other factors) against the congregation size, anticipated lifetime, building condition and maintenance priorities, current and future financial position, existing congregation resources, the co-contribution proposed by the congregation, governance and compliance (OHS and ESM in particular) and any other relevant factors.
- Provision of funding will generally only be available for property works that meet one of the below requirements.
 - Address serious safety risks.
 - Protect the capital asset.
 - Improvements to make buildings fit-for-purpose for mission where the Responsible Body has demonstrated long-term viability.

5.2 Types of financial assistance available

The Program consists of the financial assistance types detailed in the following table.

Type	Summary
Capital Works	- Financial assistance for mission-focused property development and maintenance projects. - A maximum limit of to \$50,000 per property/operational site applies, and there may be a requirement for Synod contribution to be matched by local funding. - Once approved, funds may be utilised can be accessed for up to two years.
Emergency Capital Works	- Financial assistance to for urgent repairs or works that are not covered by insurance. - A maximum limit of up to \$10,000 per property/operational site applies, and there may be a requirement for Synod contribution to be matched by local funding.
Heritage Works	- Financial assistance for required heritage works on heritage classified properties. - A maximum limit of up to \$50,000 per property/operational site applies, and there may be a requirement for Synod contribution to be matched by local funding.
Disability Upgrade Works	- Financial assistance to support disability access upgrades to buildings. - Funding may cover up to 50% of total cost of works, with a maximum limit of up to \$50,000 per property/operational site applies.
Essential Safety Measure (ESM) Support Fund	- Financial assistance to support costs associated with meeting ESM compliance requirements for buildings. - Funding may cover up to 50% of total cost of works. No set maximum funding amount per property applies.

5.3 Funding sources

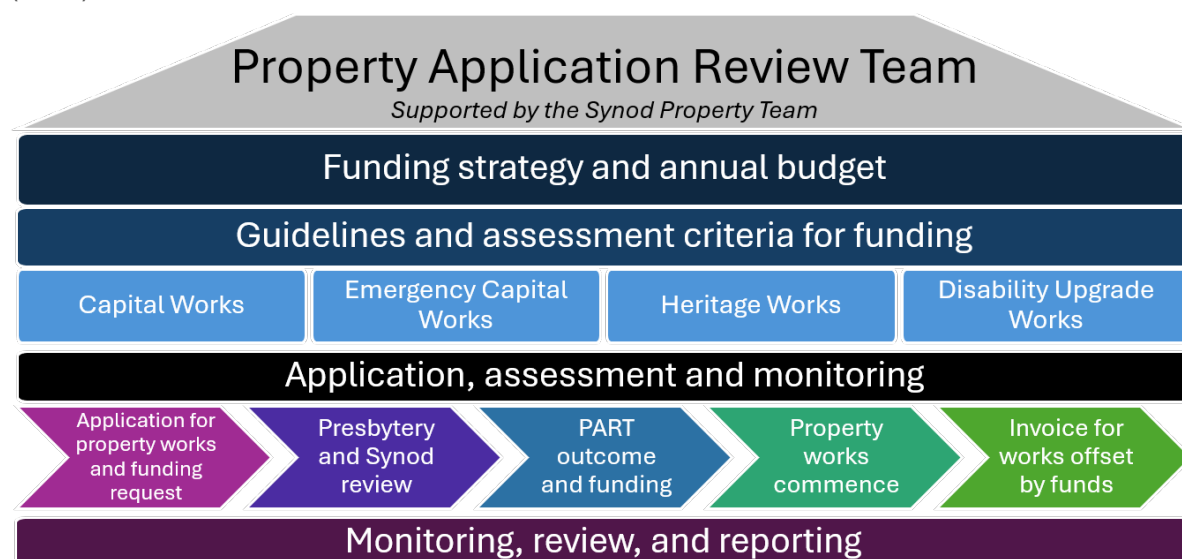
Property grants are funded primarily from wider church sharing from Property Sale Proceeds (as directed by Synod Standing Committee) along with a special purpose trust. All funding sources are summarised below.

Funding source	Summary
Synod Capital Work Fund	- Designated Synod funds set aside, and accumulated from sharing in historic property sale proceeds, to provide supplementary funding for critical and mission aligned capital works projects, or emergency capital works to ensure building safety. - This fund is finite, however may be replenished through ad hoc contributions arising from: - Profits from property development projects where agreed portion of profit is to be set aside for this purpose. - Recovery of prior contributions to capital works where property is later sold. - Bequests given for general property maintenance for any properties across the Synod. - Contributions from Money for Mission (refer related item in this table).

Funding source	Summary
Synod Heritage Works Fund	Designated Synod funds set aside by the now legacy 'Board of Mission and Resourcing (BOMAR) in 2011 to provide supplementary funding to support required heritage works on heritage classified properties.
Synod Disability Access Fund	Designated Synod funds set aside by SSC at recommendation from the now legacy BOMAR in 2003 to provide supplementary funding for upgrades to buildings to meet disability access standards.
Crouch Fund	- A portion of accumulated income from the Crouch Trust distributed by UCA Property Trust (Victoria) in 2024 for the purpose of providing supplementary funding for compliance works at buildings to meet ESM requirements. - Ongoing contributions from annual income from the Crouch Trust distributed each year for the same purpose – until that purpose is deemed completed. - Once ESM compliance targets have been achieved, Property Trust may reallocate to other appropriate purpose.
Money for Mission Fund distributions for mission grants <i>Restrictions and use as per Money for Mission Fund Terms of Reference</i> <i>Not a current active funding source</i>	- The MFMF is an investment fund utilised primarily as part of property sale proceeds sharing and investment arrangements with the invested capital balance preserved and twice-yearly distributions of income being provided to unit holders. - Income on 'Wider Church Units' are distributed to the Synod to fund wider Church needs in accordance with the terms of reference (TOR) of the fund. This includes potential funding for presbyteries, Assembly, Congress, and grants. However, distributions are applied in order as set out in the TOR and funding is not expected to flow to mission grants until 2030 or later, dependent on the balance of invested funds increasing. - Income from this source can be available for use once received but cannot be reliably expected and forecast to cover commitments for future grant years.

6 Framework and process overview

The following diagram provides a visual summary of the framework and process that is followed for the lifecycle of the Program. Further detail on provided in the sub-sections below.



6.1 Funding strategy, priorities and annual budget

PART (assisted by the Project Finance Business Manager in the Property Services unit) will review usage, sustainability and request appropriate funding as part of the annual budget process. Property Trust will review the application of Crouch Trust income once ESM compliance targets have been met.

Budget will include expected payments from existing funding commitments, and provide approximate allocations of budget for new commitments for each funding type within the Program. The total budget represented in the Synod budget will then consist of the total value of funding commitments expected to be paid in the following year.

6.2 Funding guidelines and assessment criteria

Each funding type operates under approved guidelines as set by PART that outline its purpose, objectives, eligibility requirements, assessment criteria, funding parameters and any specific conditions of funding.

Funding guidelines promote transparency, consistency and fairness by ensuring applicants understand the requirements, expectations and basis upon which applications will be assessed.

6.3 Applications

Applications must be submitted in the approved format and must accompany the relevant property application form for the related works. Funding requests will not be considered before property project has been scoped, quoted, and appropriate forms submitted to PART.

Applicants are responsible for providing complete, accurate and sufficient information to support assessment of their proposal. To be considered for funding, applicants are required to complete annual Community Life Return and Financial Return surveys, noting this information is utilised as part of review and assessment process.

There is a single PART form for application for financial assistance for property works. Guidelines, application materials and supporting information are made available via the Synod's website to assist prospective applicants in preparing and submitting applications.

If further assistance is required, please contact the Property Services Team.

6.4 Presbytery and Synod review

Applications are made initially to Presbytery, who review and provide comment and, where appropriate, endorse. Following presbytery endorsement, the application is sent to the Synod Property Team, who will collate application documents, and record applications in the central database (CRM Data Warehouse – Applications dataset) in readiness for PART consideration.

In Presbytery considerations, commentary must be provided on the applicant congregation's vitality, mission plan and activity, governance capacity, future sustainability and "fit" with the Presbytery's congregational strategy.

6.4.1 Presbytery support

Presbytery Property and Resourcing Committee approval is part of all property applications. Presbyteries contribute local insight and regional perspectives to the assessment process.

Presbyteries are required to assess applications and confirm that works cannot be funded locally, and that works would be an appropriate use of limited funding available. Presbyteries should also be mindful of prioritising sustainable sites given the limited funding available.

6.4.2 Synod review

Specialist input supports informed and robust decision-making and assists in identifying potential risks, opportunities and implementation considerations.

Synod Property Services team members are consulted to provide advice regarding the primary property works form. This may include consideration of governance, safety and compliance, resourcing needs, costs, and future sustainability of the property.

Synod will review funding applications against available funds and priorities, and provide advice and input to PART regarding whether funding should proceed.

6.5 PART assessment and outcome

Assessment and approval of grant applications must be undertaken in a fair, transparent and impartial manner. Individuals involved in application, assessment, review or decision-making are required to declare and appropriately manage any actual, potential or perceived conflicts of interest.

PART reviews assessment outcomes and comments from presbytery and Synod review and determines if funding will be provided. PART can only approve funding in accordance with approved delegations and funding availability as per preset annual budget.

Applicants are notified of the outcome following completion of the decision-making process. This will include the maximum funding amount.

Synod Finance Team are advised of any approved funding commitments, with these to be added as 'Projects' to the Dynamics 365 Finance System, and commitments raised against relevant funding source account.

6.6 Property works

Once relevant forms approved a team member from Synod Property Services will be appointed to coordinate the project as per standard processes.

6.7 Funding payments

Funds will not be paid in advance to the Responsible Body before works are completed. Funds are drawn down as required to either pay the service provider directly on invoice of completed works, or to reimburse the Synod / Responsible Body for amounts paid.

Funding may only be utilised for the approved purpose, and within the approved timeline.

- Material delays to project may result in funding offer being rescinded.
- Unused funds are to be returned upon project completion to the source of the grant.

Property Services fees for project management / coordination must be paid by the Responsible Body and cannot be funded from financial assistance funds.

Upon project completion the Responsible Body will be invoiced for the relevant amount for the property works and for any Property Services fees, net of any funding provided by Synod.

6.7.1 Variations

Where circumstances arise that may affect the delivery, scope, timing, budget or outcomes of a funded activity, the appointed Synod Property Project Manager must notify PART as soon as reasonably practicable and seek approval for any variation.

Variation requests may be considered where there is a demonstrated need and the proposed changes remain consistent with the purpose and objectives of the original funding approval, and there are sufficient funds available (if variation requires additional funding). Requests for variations may be declined where the variation would substantially alter the purpose of the funded activity, create unacceptable risks, delay payments to a later financial year, or otherwise conflict with the original intent of the grant.

6.7.2 Funding expiry (funds not used in approved timeframe)

Funding is approved for a specified funding period. Funding not utilised or activities not completed within the approved timeframe may lapse unless an approved variation has been given to extend the funding period. Expired funding commitments must be reviewed and formally closed, with any unspent funding commitment being released.

Funds committed to projects that are not progressing represent an opportunity cost, as those resources cannot be redirected to other needs.

Where funding has expired due to timing delays, Responsible Bodies may still re-apply for funding at a time when the project is more action-ready. A prior approval in such cases does not guarantee a future approval.

6.8 Monitoring, review and reporting

Information regarding balance of funding sources, total outstanding value of funding commitments, status of funded works, and key outcomes shall be monitored and reviewed by PART, reported to other governance bodies as appropriate.

Review helps to inform and shape consideration of future budget allocations or adjustments to program guidelines or prioritised works for funding. Reporting supports transparency, accountability and continuous improvement.

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. 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. 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.
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.

- Money for Mission Fund Terms of Reference (2026)
- Synod Grant and Financial Assistance Policy (2026)
- Guidelines and assessment criteria for individual grant types

Document control

Document Owner:	The Synod Property Officer is responsible for the management and maintenance of this document.			
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Version	Date	Update by	Summary of changes	Approval date
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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.