

Port Phillip East Presbytery Property Manual



This property manual has been produced by Port Phillip East Presbytery Property Committee.

It will be updated as new advice and guidelines are published by the VicTas Synod and the Presbytery.

August 2022

Acknowledgement of Country

Port Phillip East Presbytery acknowledges that we gather on the traditional country of the Boon Wurrung and Wurrundjeri Peoples of the Kulin nations. We pay our respects to their elders past and present. As First and Second Peoples we commit ourselves to journey together in the sacred trust of caring for this land, and as Christ's people of working towards God's promised goal of reconciliation and justice for all Creation.

Introduction

This Property Manual has been developed for the use of congregations in Port Phillip East Presbytery.

It's designed to be updated regularly by the Presbytery in response to enquiries from congregations and advice from Synod.

The Presbytery anticipates that regular forums and training workshops will be run each year, highlighting changes or updates.

Sources

A lot of the material in the manual can be found on the Victoria Tasmania Synod website:

<https://victas.uca.org.au/resources>

Port Phillip East Presbytery website hosts a range of resources for church councils, including the Constitution, Regulations and Manual for Meetings.

<https://ucappep.org/healthy-church-councils>

Changes

If you have any suggestions for updates for the Property Manual, contact Presbytery Secretary Anne Kim, secretary@ucappep.org

Duncan Macleod, Presbytery Minister

Anne Kim, Presbytery Secretary

Gavin Faichney, Chair, Presbytery Property Committee

Ian Cayzer, Secretary, Presbytery Property Committee

Contents

A. People & Structure

1. What is a responsible body?	4
2. Planning around Mission	5
3. Role of Church Council	7
4. Role of Presbytery	9
5. Role of Synod	11
Property Services Team	12
Risk Management	14
Insurance Services	15
Legal Services Team	16
Synod Property Trust	17

B. Compliance, Safety & Security

Occupational Health and Safety (OHS)	18
Reporting Procedures	19
Essential Safety Measures (ESMs)	20
Building & Grounds Security	23

C. Renting/Leasing

1. Hall Hirer Agreement	29
2. Leasing Residential Property	29
3. National Policy on Sharing of Property between UCA congregations & faith communities	30
4. Application to Lease Forms	30
5. Checklist Renting out residential property	31
Approval Processes for	
6. Leasing Residential Property	32
7. Memorandum of Understanding	33
7. Leasing Commercial or Retail Property	34

D. Selling & Buying

1. Selling a Property	35
2a. Approval Process for Sale of Property	37
2b. Approval Process for Money for Mission	38
3. Buying a Property	39
4. Process for Purchase of Property	40

E. Building, maintenance & minor works

1. Minor Builds (<\$1m)	41
2. Approval Process for Minor Builds	42
3. Projects & Development (Major Building Projects & Development)	43
Project Approval Process	45
1 Getting Started	45
2A Presbytery Discernment	45
Project Control Group	46
2B Project Business Case	46
3 Applying for approval for full project plan	47
Project Implementation Process	48
Contractor & Consultants	
Online Safety Management Platform	51

F Grants & Loans

G. Manse Provisions

Provision of Manses & Alternatives	54
Manse Guidelines	
1. Foreward	56
1. Planning Guidelines	56
2. Basic Accommodation Requirements	58
3. Basic Equipment Requirements	60
4. Basic Furnishings	62
5. General Provisions	62
6. A Plan for Finance	63
7. Regular Maintenance Inspection	63

Glossary

A. People & Structure

I. What is a responsible body?

Church members frequently use possessive language when referring to the place that they attend to worship God, or to participate in other activities associated with those who relate to that site. They will say, “It is my Church or it is our Church.”

Often the beginnings of the property becoming the place of the Church building is that a person may have donated a parcel of land for that purpose.

Alternatively, a group of Christians, in wanting to create a place for Christian worship, have banded together and bought the land and amassed the resources to pay for its erection and the purchase of all the contents.

However, in the Uniting Church in Australia there is only one body where this ownership legally resides. The legally registered body to hold (own) property in Port Phillip East Presbytery is the The Uniting Church in Australia Property Trust (Victoria), which holds the legal title for all UCA property in Victoria, and which acts in relation to property matters at the direction of the appropriate responsible body of the Church

The Church used to use the term “beneficial user” to differentiate between the legal ownership of the property and the localised responsibility for its use and maintenance. This term has now been replaced by the term “Responsible Body”. A Responsible Body in the UCA Regulations means any Body of the Church to which specific responsibilities are assigned by the Constitution or by any Regulation, by-law or rule.

The Responsible Body is the congregation, Presbytery or other body that carries responsibility for the site, its maintenance, Essential Safety Measures, and decisions about leasing, sharing or sale, in consultation with the Presbytery and Synod.

Legal documents for purchase, sale and lease are signed by the Authorised Officer of the The Uniting Church in Australia Property Trust (Victoria). No congregation member has authority to sign on behalf of the Property Trust.

Local decisions about property are first to be made by the Council of the responsible body. If it’s a congregational property, the Church Council carries responsibility for recommendations to the Presbytery and the Synod. If it is a Presbytery-held or Synod-held property, the appropriate Standing Committee carries responsibility for such recommendations.

Responsible bodies in the Uniting Church with governance groups

Assembly

Assembly Standing Committee

Synod of Victoria and Tasmania

Synod Standing Committee

Property & Operations Committee

Ministry & Mission Committee

Presbytery

Presbytery Standing Committee

Property Committee

Congregation

Church Council

Agency

(Uniting, Uniting AgeWell)

Boards

2. Planning around Mission



Property for Mission Workbook



Property for Mission

The Property for Mission Workbook provides a Church Council with a clear, easy to use, process designed to deliver quality objectives for a Property Application for major property plans or works.

The Workbook includes six inquiries, each matched to a practical planning exercise through to a reporting page. The Inquiries probe mission purposes, property requirements, funds and property for whom the congregation(s) / Church community is responsible, building user priority, property assessment in respect of future mission requirements, and a vision for property.

The Inquiries are supported by a suite of Appendices, including the Synod's Mission Principles and a session plan to engage these by way of critical assessment of current mission plans in action.

The Property for Mission Workbook resources will be actioned by Property Services within current Property Application or Asset Strategy Program processes.

Contact the Presbytery Property Committee for help in exploring the missional framework for your property.

You can download resources to help with the process on the VicTas Synod website:

victas.uca.org.au/resources/property-legal/property

Uniting Church in Australia Regulations (2018)

4.4.1 CHURCH COUNCIL RESPONSIBILITY FOR PROPERTY

Subject to the Regulations, the by-laws of the Synod and the rules of Presbytery, the Church Council shall be responsible for the management and administration of all property of the Church acquired or held for the use of the Congregation, and without limiting the generality of the foregoing shall:

- a. be responsible for the care and maintenance of property;
- b. subject to clause (e) of this Regulation, determine the use of land and buildings;
- c. deal with proposals for the acquisition or disposal of any property or the creation or extinguishment of any rights or interests in property by whatever means;
- d. consider and if thought fit make recommendations concerning erection, demolition, alteration or enlargement of church buildings and other buildings;
- e. consult with a Congregation regarding any proposal concerning property that would have a substantial effect on the life, witness and service of the Congregation;
- f. be responsible for the financial affairs and the management and investment of all funds related to property;
- g. do such other things as are necessary or appropriate for the use and management of all property acquired or held for the Congregation.

4.4.2 NOTICE OF BUSINESS

- a. Unless at least seven days' notice convening the meeting and specifying the business that shall be dealt with at the meeting has been given it shall not be competent to pass any resolution recommending or resolving to:
 - (i) erect, enlarge, demolish, remove or substantially alter any building;
 - (ii) incur any expense for repairs exceeding such sum as may be determined by the Synod from time to time;
 - (iii) sell, mortgage, exchange, lease, grant or extinguish any estate, right or interest in any land, or surrender or accept the surrender of any lease;
 - (iv) acquire any land or interest in land;
 - (v) alter the general purposes for which any land or building is or may be used;
 - (vi) invest any funds other than on short-term deposit with any of the financial institutions approved by the Synod in accordance with Regulation 3.8.7(b);
 - (vii) appropriate any funds except for current expenses.
- b. It shall be competent for the Church Council to deal with and resolve any of the matters referred to in Regulation 4.4.2(a), notwithstanding that the prescribed notice has not been given, if a majority of those present at the meeting of the Church Council resolve to waive such notice, provided that the majority of votes cast in favour of such waiver shall be not less than three-fifths of the total membership of the Church Council.

4.4.3 ANNUAL PROPERTY REVIEW

At least once in every year the Church Council shall receive the audited accounts and review the following matters in respect of each property for which it is responsible:

- (i) the state of repair;
- (ii) the adequacy of the insurance cover;
- (iii) arrangements made in respect of public risk insurances and personal accident insurances for voluntary workers;
- (iv) the financial position in respect of each property.

4.4.4 COUNCIL AND COMMITTEES

In exercising the responsibilities set out in Regulation 4.4.1 the Church Council may itself carry out all these responsibilities or may appoint one or more committees to be responsible to the Church Council in respect of such one or more properties as the Church Council may specify for:

- (i) the supervision and use of the property;
- (ii) maintaining the property in good repair;
- (iii) such other responsibilities as the Church Council may determine;
- (iv) reporting in respect of such matters as the Church Council may require.

3. Role of Church Council

The roles and responsibilities of the Church Council include managing and controlling property, as defined in the Uniting Church in Australia Regulations 3.1.2 (b) (ix) and 4.4.1. (Read this on page 6)

A Church Council is able to make decisions on behalf of the congregation within certain limitations.

These roles and responsibilities are as follows:

The Church Council is responsible for applications to lease, sell or purchase property.

These can only proceed with the approval of the Presbytery Property Committee and subsequently by the Property Applications Review Team of the Synod (PART). Such applications will frequently be assisted by advice from Synod Property Services personnel. In certain circumstances with high value sales or purchases, the process may be executed completely by Synod Property Services personnel.

Church Councils have authority to expend **up to \$20,000 on individual projects** without Presbytery or Synod approval, unless they are being funded by property sales proceeds or loans. However, the Presbytery Property Committee will welcome the opportunity to offer advice on significant projects under that limit.

Applications to Build with costings up to \$50,000 on an individual project require Presbytery approval.

Applications to Build with costings greater than \$50,000 on an individual project require Presbytery approval and the approval of PART at the Synod.

Annual Property Review: (Regulation 4.4.3) requires that at least once in every year the Church

Council shall ... “review the state of repair in respect of every property for which it is responsible.”

Congregation

In defining the role of the Congregation with respect to property matters, Regulation 4.4.1 (e) is relevant.

The Church Council shall (e) consult with a Congregation regarding any proposal concerning property that would have a substantial effect on the life, witness and service of the Congregation;

Local People (Congregation/Church Council)

At a local level the church council may need to make significant decisions that affect the congregation’s budget, as well as long term strategic decisions around property. The church council may delegate responsibilities for management of the property to individuals or committees. The following are examples of ways a church council may choose to delegate responsibility.

- Property Coordinator/Contact Person(s)
- Property Committee (Convenor)
- Rental/Booking Administrator
- Representatives for Repairs

Uniting Church in Australia Regulations (2018)

4.3.1 PRESBYTERY PROPERTY COMMITTEE

- a. Each Presbytery shall appoint a Presbytery Property Committee and shall determine the membership and term of appointment of members of the Committee.
- b. A Presbytery Property Committee, subject to any relevant by-laws and directions of the Presbytery, shall:
 - (i) advise Church Councils and other bodies within the bounds of the Presbytery with respect to property matters for which they are responsible;
 - (ii) receive and consider applications from Church Councils and other bodies within the bounds of the Presbytery with respect to property matters as provided by these Regulations having regard to:
 - the mission of the Church within the bounds of the Presbytery,
 - the policies of the Synod and Presbytery,
 - financial feasibility,
 - design and location,
 - any other relevant matter;
 - (iii) submit proposals from any Church Council or other body within the bounds of the Presbytery to the Synod Property Board with recommendations for final decision;
 - (iv) initiate proposals with respect to property matters within the bounds of the Presbytery; and
 - (v) regularly inspect or arrange for the regular inspection of properties for which the Presbytery and Church Councils and other bodies within the bounds of the Presbytery are responsible and propose and report to Presbytery such action as may seem desirable to ensure that the properties are maintained in good and safe condition.
- c. A Presbytery may authorise the Presbytery Property Committee or another committee or committees to take responsibilities in respect of such one or more of the properties for which the Presbytery is itself responsible, including:
 - (i) the supervision and use of the property;
 - (ii) maintaining the property in good repair;
 - (iii) reporting in respect of such matters as the Presbytery may require; and
 - (iv) such other matters as the Presbytery may determine.
- d. In a matter of extreme urgency the Presbytery Property Committee may remit any application received by it to the Synod Property Board which shall be entitled to deal with such application without any recommendation thereon having been made by the Presbytery Property Committee, and in cases where the Moderator certifies that circumstances of extreme urgency exist, the Moderator may authorise the Synod Property Officer and the Synod Secretary to make a decision and take action in the name of the Synod Property Board, such action to be subsequently reported to the Board and to the Presbytery Property Committee.

4. Role of Presbytery

Regulation 4.3.1 requires a Presbytery to have a Property Committee which has the responsibility to advise Church Councils with respect to property matters; receive and consider applications and submit such proposals to the Synod Property Board with recommendations for approval.

The Presbytery Property Committee is also required to regularly inspect all congregational property within its bounds.

Presbytery Property Committee

The Presbytery Standing Committee has delegated authority to the Property Committee to deal with all matters related to property.

The Property Committee works with the Presbytery, congregations, Synod Property Services, Risk and Insurance, and Legal Services, to assess and complete property related works in congregations. including documentation and processing of property applications.

The Property Committee finds people to support congregations in projects requiring a Project Control Group.

The Committee meets on the evening of the third Thursday of each month, February through to December.

Key People

Chair: Gavin Faichney
gwif44@gmail.com
0438 140 702

Secretary: Ian Cayzer
ianrcayzer@hotmail.com
0409 860 427

Presbytery Minister: Rev Duncan Macleod
pm-tl@ucappep.org
0439 828 718

Send applications to the Presbytery Property Committee

Anne Kim
Presbytery Secretary
secretary@ucappep.org

Port Phillip East Presbytery
PO Box 696
Noble Park VIC 3174

3.1.5 RESPONSIBILITIES OF THE SYNOD

Without limiting the generality of the responsibilities of a Synod as set out in Paragraph 32 of the Constitution, a Synod shall be responsible for:

- k. providing for the effective supervision of property matters within the bounds, in accordance with the property Regulations, including:
 - (i) appointing the elected members of the corporate trust in accordance with the provisions of the Acts or Ordinances (as amended) as the case may be in the State or Territory concerned;
 - (ii) appointing the members of the Property Board and making any other appointments required under the provisions of the property Regulations;
 - (iii) appointing an officer to administer property affairs and related matters;
 - (iv) the general oversight and management of Synod funds and of Synod policy and procedures relating to property;

4.2.1 FUNCTIONS OF PROPERTY BOARD

Each Synod shall appoint a Property Board which shall:

- a. advise the Synod with respect to policies relating to property within the bounds of the Synod;
- b. supervise the implementation of the Synod's policies in regard to property within the bounds of the Synod;
- c. consult where appropriate and advise Presbyteries, Church Councils, institutions and other agencies of the Church with respect to property matters within their bounds;
- d. receive proposals with respect to property matters submitted to it by the Presbyteries, Church Councils, institutions or agencies, ensure that each proposal is in accordance with the policies of the Synod with respect to property matters, development and mission and give the final decision with respect to such proposals;
- e. initiate proposals with respect to property matters;
- f. carry out functions (b) to (e) above in respect of departmental, institutional and other property outside the jurisdiction of Presbyteries and Church Councils;
- g. only approve the transfer of any real estate vested in a Uniting Church Property Trust to any Aboriginal and Islander organisation with the prior approval of the National Executive of the Uniting Aboriginal and Islander Christian Congress; (See Reg. 3.2.6) and
- h. perform such other duties and functions with respect to property matters as may be referred or delegated to it by the Synod from time to time.

4.2.2 DELEGATION TO PRESBYTERY

- a. A Synod Property Board may delegate to:
 - (i) the Property Committee of any Presbytery, or
 - (ii) another body within the Synod, or
 - (iii) a Church Council of a Congregation which is designated as a Parish Mission or a committee of that Church Council, or
 - (iv) the Property Officer, and / or specified positions any of its powers of consent or approval in relation to property, provided that the financial liability involved, or the value of the property concerned, does not exceed such sum or sums as the Synod may determine from time to time.
- b. A Synod Property Board may withdraw such delegation, either generally or in a particular case, at any time.
- c. The delegation shall be made subject to such conditions as the Assembly or the Synod Property Board shall determine from time to time.

5. Role of Synod

The Uniting Church in Australia Property Trust (Victoria), The Uniting Church in Australia Property Trust (Tasmania)

When the Uniting Church was formed in 1977 the legal status of the denomination was constituted in each of the states of Australia through the Uniting Church in Australia Act 1977.

Uniting Church in Australia Regulation 3.1.5 (k) provides for the establishment of a body to effectively supervise all property matters within its bounds according to the Acts and Ordinances of the State. Because our Synod covers two States there are separate Property Trusts for Victoria and Tasmania.

This is the legal body through which the Uniting Church owns, purchases, sells and leases property.

Synod Property & Operations Committee

The Synod Standing Committee has designated two primary subsidiary committees to coordinate all aspects of the governance and oversight of Synod operations.

One is the Property and Operations Committee, which has two sub-committees, being the Property Applications Review Team (PART), and the Finance Committee.

The other primary committee is the Ministry and Mission Committee.

Property Applications Review Team (PART)

PART is a sub-committee of the Property and Operations Committee.

PART processes applications for property and finance matters and has the authority to make decisions within respective policies and authority limits. It considers Money for Mission Fund applications.

Property matters include applications to lease, build, purchase, sell and develop. Finance matters include applications for a loan, grants (Disability Access Fund or Emergency), use of property sale proceeds, and establishment of an Interest Only Mission Fund.

For further information please contact Rev Ian Cayzer, 0409 860 427 or iancayzer@hotmail.com. Please never send Forms directly to the Synod in an attempt to speed up the approval process. PART always relies on Presbytery comment and approval and will not give prior approval until Presbytery approval has been given.

Mission Resourcing Unit

The Synod of Victoria and Tasmania employs staff to support the work of the church. Based at the Synod offices at Wesley Place, 130 Lonsdale St, Melbourne.

Property Services Team provides a source of technical advice on all property matters.

Insurance and Risk

Synod Insurance Services team provides expert assistance for all congregations, schools, camps and UCA affiliates, such as Uniting and Uniting AgeWell. The Risk Management Team supports all areas of the church in identifying, assessing, and helping to manage key risks.

Legal Services

Synod Legal Services team works with the Property Trust to ensure that Synod has comprehensive legal expertise to serve the needs of the Church.

It is available to provide advice and assistance to congregations, agencies and ministers on a reasonable fee-for-service basis.

Property Trust

Synod Property Trust Secretary is available for assistance and further inquiries.

equipping Leaders for Mission Unit (eLM)

The Synod of Victoria and Tasmania employs staff to support the ministry and mission of the church. Based at the Centre for Theology and Mission, Parkeville. This includes Missional & Property Grants Officer

Property Services Team

The Property Services team will assist you in managing your properties for purchase, sale, build, lease and maintenance. This includes general property transactions, caveats, covenants, easements, lease negotiations, highest and best use of property and the ongoing management of assets. The purpose is to optimise assets and remain focused on mission directives.

Peter Thomas

Director – Property Services
t (03) 9116 1948
m 0410 487 373
e Peter.Thomas@victas.uca.org.au

Leadership of the Property team. Development of strategies to assist orderly and missionally focussed activation of the real property resource of the UCA, in partnership with the councils of the church. Recipient of/respondent to complaints as we try to respectfully challenge past practices in today's world, especially OH&S, past practice and financial related. Hopefully, an honest provider of sound counsel as we continue the journey into times where property must take a more active role in supporting and sustaining congregations and mission resourcing in a rapidly changing environment, made more challenging by diminishing human and financial capabilities.

Siobhan Reed

Manager Assets & Administration
t (03) 9116 1957
m 0415 299 722
e siobhan.reed@victas.uca.org.au

Siobhan provides guidance and assistance, as a first point of reference to Presbyteries and congregations regarding the management and care of property assets. She works with Responsible Bodies to ensure buildings are maintained, essential Safety Measures are compliant and properties meet the relevant planning and building code.

Oversees the leases in and lease out approval process. Reviews lease agreements to ensure compliance to relevant acts (Residential or Retail) Refers to Synod legal services where required. Undertakes telecommunication tower lease negotiations on behalf of congregations.

Able to give guidance and support regarding property acquisitions, disposals and maintenance.

Manages PART administration and process.

Kim Quach

Project Manager – Property Services
t (03) 9116 1954
m 0429 066 195
e Kim.Quach@victas.uca.org.au

Responsible for construction pre-planning, consultant engagement and technical advice relating to minor and major projects and property maintenance items. Assists congregations in delivery of construction projects, ensuring budgets, timeframes, regulatory compliance, safety requirements are met.

Amal De Silva

Project Manager – Property Services
m 0456 708 601
e Amal.DeSilva@victas.uca.org.au
Responsible for construction pre-planning, consultant engagement and technical advice relating to minor and major projects and property maintenance items. Assists congregations in the delivery of construction projects, ensuring budgets, timeframes, regulatory compliance, and ensuring safety requirements are met.

Russell Craig-Brown

Manager Development Projects – Team Leader
t (03) 9116 1943
m 0412 572 912
e Russell.Craig-Brown@victas.uca.org.au

Able to assist Presbyteries and congregations in helping to align property needs with missional requirements including giving guidance on property revenue opportunities (ground / facility leases – new and lease renewal negotiations), planning applications, rezoning and built form development etc. and strategies to minimise costs, e.g. redevelopment costs, land tax liabilities etc.

Providing assistance with Asset Strategy Programs (ASP's) including Manningham, Banyule, Coburg, Preston Elsternwick and Chelsea-Carrum.

Peter Hansen

Manager Development Projects
t (03) 9115 1945
m 0417 020 659
e Peter.Hansen@victas.uca.org.au

Responsible for partnering with UCA property users in evaluating development/redevelopment opportunities as well as smaller capital and maintenance projects. Once development opportunities are approved assists with the effective administration and delivery of projects.

Rina Neustroski

Manager Development Projects

t (03) 9116 1951

m 0438 772 613

e Rina.Neustroski@victas.uca.org.au

Responsible for supporting UCA property users and Presbyteries in evaluating developments/ redevelopments from planning to delivery and with long term asset management advice. Offers contractual assurance and regulatory obligations support. Able to provide complex technical advice for heritage, maintenance, restoration, refurbishment and evaluation of new and existing buildings.

Steve Abonyi

Project Finance Business Manager

t (03) 9116 1946

m 0438 128 793

e Steve.Abonyi@victas.uca.org.au

Provides independent financial review of projects. Can assist Presbyteries with financial strategies for long term financial sustainability. Can assist with project and congregation financial modelling and advice.

Natalie Brown

Grants Coordinator

equipping Leadership for Mission

t (03) 9116 1960

m 0414 527 355

e Natalie.Brown@victas.uca.org.au

Primarily responsible for processing and implementing the annual missional and capital grant programs including mission grants for ministry, mission and capital programs as well as small rural grants. Oversees the implementation of other grant programs as they arise, such as grants from the Presbyteries Additional Resources and Innovative Projects Fund. Liaises with grant recipients on an ongoing basis regarding the progress and evaluation of programs and their compliance with the funding sources.

Able to provide guidance to congregations and presbyteries regarding the policy and processes for Property Sale Proceeds and Interest Only Mission Funds as well as Emergency and Disability Access Fund grants.

Natalie is co-located between 130 Lonsdale St (3-4d/wk) and the Centre for Theology and Ministry (CTM) (1-2d/wk). Voice mail is monitored regularly when at CTM.

Roslyn Groves

Administration Coordinator – PART

t (03) 9116 1955

e Roslyn.Groves@victas.uca.org.au

Responsible for processing PART applications and communicating PART approvals/outcomes. Available to assist with forms, general property queries, information, signing of leases, and general property queries.

Jennifer Bars

Synod Archivist

t (03) 9571 5476

e Jennifer.Bars@victas.uca.org.au

Responsible for working with all business and mission units across the Synod to ensure records and archives are appropriately captured, managed, stored and made available for internal and external users to access as appropriate. This includes physical artefacts including the photos collection, library and reference resources and a growing collection of digitised material. Research queries are answered by phone, email and in person at the Archives Centre in Malvern East.

Insurance & Risk Management Team

The Synod Risk Management team is responsible for supporting all areas of the Church in identifying, assessing and helping to manage key risks. It works with other Synod teams and church councils and its scope includes a wide range of areas, such as:

- Environment
- Finance and property
- IT/cybersecurity
- Legal/compliance
- Missional/operational
- People/vulnerable people
- Reputational

Contacts

General enquiries:

riskmanagement@victas.uca.org.au

Rob Haworth

Director – Risk Management and Insurance Services
03 9116 1903

robert.haworth@victas.uca.org.au

Tamika McLaren

Team Leader – Audit and Risk Management
03 9116 1902

tamika.mclaren@victas.uca.org.au

Elnura Dulakovic

Synod Safety Officer
03 9116 1949

elnura.dulakovic@victas.uca.org.au

Risk Management

Risk management generally considers the following questions:

- What could prevent objectives?
- What could make the above happen?
- If something did go wrong, how bad could it be?
- What is being done or could be done to prevent things going wrong, or to minimise the impact when they go wrong?

They recognise effective risk management across all church councils is a key contributor towards achieving our missional and operational objectives and mitigating unwanted negative events.

Effective risk management supports sustainability and safeguards mission, people, reputation, operations, and finances; ultimately supporting the ongoing pursuit of our vision and mission.

To support presbyteries and congregations in their risk management activities, a risk management framework has been prepared that is available for presbyteries and congregations.

Port Phillip East Presbytery has a risk management profile and framework that can be adapted for congregations.

Fire safety

To ensure you are properly prepared for the fire season we recommend you download and complete the CFA Bushfire Survival Guide and the CCI Surviving Bushfire Checklist from the Audit Risk & Insurance page on the Synod website:

<https://victas.uca.org.au/download/42/risk-management/7631/cci-surviving-bushfire-checklist>

<https://victas.uca.org.au/download/42/risk-management/7632/cfa-bushfire-survival-guide>

For support on emergency preparation and management, contact Synod Safety Officer Elnura Dulakovic.

Insurance Services

The Synod Insurance Services team provides expert assistance for all congregations, schools, camps and UCA affiliates, such as Uniting and Uniting AgeWell.

Property claims

If the matter is urgent, telephone (03) 9116 1905, otherwise email insurance@victas.uca.org.au.

If you are required to fill out a claim form it can be found here.

victas.uca.org.au/internal-audit-risk-insurance

The full cost of replacement or reinstatement can be claimed.

Where property is stolen or damaged, metropolitan congregations must pay the first \$2,500 and rural congregations must pay the first \$1,000 of each claim. Please note that normal wear and tear and deterioration are not covered by the Property Policy.

If the claim is large and/or complicated, we will arrange for a loss assessor to assist.

Motor vehicle claims

Lodge your claim online with Zurich Insurance here. Your Policy Number is 32 2239619 GFT.

For all other enquiries, email insurance@victas.uca.org.au.

Other claims

If you have another potential insurance claim, or if an incident has occurred that you think could result in a claim then contact the Synod Insurance team at insurance@victas.uca.org.au and include all relevant details, including contact information for any key people.

Hall Hire & Public Liability Insurance

Due to fluctuating COVID-19 restrictions, hall hire is being assessed on a case-by-case basis to ensure state government are adhered to. Individuals or organisation hiring church halls or other church facilities are required to have Public Liability insurance in place. Individuals or organisations who don't have Public Liability insurance can apply for public liability insurance at insurance@victas.uca.org.au.

The Hall Hirers insurance application form can be obtained here.

<https://victas.uca.org.au/download/790/insurance-service/11502/insurance-application-form-2>

Insurance certificates

If you require a copy of an insurance certificate (Certificate of Currency) email insurance@victas.uca.org.au and a copy will be sent within 24 hours.

Insurances that can be provided are:

- Public liability
- Professional indemnity
- Employment practices liability
- Volunteer's personal accident
- Director's and officer's liability

Public Liability Insurance is also available for infrequent hirers of Uniting Church property.

The public liability policy covers activities under the control and direction of the Uniting Church, including events held off-site.

Insurance Contacts

Telephone
03 9116 1905 (business hours)
0499 303 494 (after hours)
Email
insurance@victas.uca.org.au

Legal Services Team

Synod Legal Services team works with the Property Trust to ensure that Synod has comprehensive legal expertise to serve the needs of the Church. It is available to provide advice and assistance to congregations, agencies and ministers on a reasonable fee-for-service basis.

Areas of law we can help you with include:

- General legal advice,
- Property – purchases and sales,
- Property – development consolidation and subdivision,
- Adverse possession,
- Act 391 applications,
- Leasing, including commercial, residential and church buildings,
- Telecommunication leases,
- Licence agreements for occupation of premises,
- Commercial tenders and/or disputes,
- Litigation,
- Mediation,
- Estates,
- Wills,
- Drafting agreements,
- Copyright.

Legal Contacts

If you're unsure who to contact, please use the email address UCA.Legal@victas.uca.org.au

This email address is checked daily and they will then allocate the work to the relevant people. You can also call Jacqueline or Alan Zhang (email below) and they will find the relevant team member for you.

If you wish to discuss the matter before sending it through or you are familiar with a member of the Legal Services team, you're welcome to send the matter in directly to that staff member.

Jacqueline Cameron (Mon to Fri)

All areas

9116 1450

0447 883 696

Jacqueline.cameron@victas.uca.org.au

Alan Zhang

Alan.Zhang@victas.uca.org.au

Synod Property Trust

The Uniting Church in Australia Property Trust (Victoria) ('Property Trust') is the incorporated entity for properties in Victoria that are part of the Uniting Church in Australia.

The Property Trust is listed on the Title of all properties and a member of the Property Trust must sign all contracts relating to property, like leases, sale contracts, planning permits, etc. just as an owner would. The usual person that signs these important legal documents is the Synod Property Trust Secretary (previously called the Property Officer).

There are a number of legal activities that congregations cannot do in their own right, such as own land, sue others in Court or be sued, etc. That is because congregations are unincorporated entities.

When a congregation wants to take an action on a property that they are the Responsible Body for they make an application to the Property Application Review Team (PART) via the Presbytery.

If a congregation applies for a grant from state or federal government (example, for solar panels to be installed) then they should list the Property Trust and Synod Property Trust Secretary as the applicants, and the congregation should list themselves as the location of the work and as the contact person for the grant. If successful, the Synod Property Trust Secretary will provide a Letter of Auspice to the government body confirming the funds will be forwarded to the congregation for the purpose of the Grant. The Synod Property Trust Secretary can assist congregations with completing and submitting grant applications.

Property Trust Contact

Rod Skilbeck

Synod Property Trust Secretary
t (03) 9116 1426 |
e Rod.Skilbeck@victas.uca.org.au

The role of Property Officer does a few things: Secretary of both the Property Trust and the Property and Operations Committee, Chair of the Property Application Review Team (PART) and manager of the Synod Trust team.

The Synod Property Trust Secretary acts as Chair of PART. When PART has received all the information it requires and has agreed to the request, the Synod Property Trust Secretary will write to the congregation confirming permission is granted and will sign any relevant documents or contracts that follow as part of the activity.

The Synod Property Trust Secretary also manages the Synod Trusts team who administer nearly 700 trusts, many of which benefit individual congregations. Applications to withdraw funds from trusts come to the Synod Property Trust Secretary and the team can assist with any questions congregations have about their trusts or making new bequests to the UCA.

Another role the Synod Property Trust Secretary has is to declare buildings unsafe if they pose a danger to the public and congregation members. This happens rarely and may be caused by an emergency like fire or flooding. Declaring a building unsafe is usually very urgent and results in an immediate prevention of access to a building.

Congregations will most often engage with the Synod Property Trust Secretary when they need something legal signed, or, want to sell, renovate or lease a property they use.

B. Compliance, Safety & Security

Occupational Health and Safety (OHS)

Church facilities and worship centres are workplaces and we are committed to providing a safe and healthy workplace for all occupants, such as employees, residents, clients, congregation members, visitors, contractors and volunteers.

You will find a comprehensive list of workplace policies, procedures and checklists on the Synod website: victas.uca.org.au/ohs

When an incident happens, please identify the type of incident and follow the steps to notify, report and investigate.

To report an incident, fill out the Incident Report & Investigation Form from victas.uca.org.au/ohs

Please call the Synod Safety Officer if you require assistance to complete the Incident Report Form

Contacts

General enquiries:
synodohs@victas.org.au

Elnura Dulakovic

Synod Safety Officer
03 9116 1949 or 0416 319 162
elnura.dulakovic@victas.uca.org.au

WorkSafe Victoria

WorkSafe Victoria has resources designed for employers and employees on their website:

worksafe.vic.gov.au

Type of Incident	Reporting Procedures
Near miss or no injury incident (Event with no injury or damage but had the potential to do so)	<ol style="list-style-type: none"> 1. Notify immediate supervisor, church and presbytery ministers 2. Complete incident report within 24 hours 3. Review incident, identify hazards/risks, select control measures, as required 4. Send copy of incident report to the Synod Safety Officer by the end of the month
First Aid Incident (Immediate, short term, one-off treatment given by first aid personnel)	<ol style="list-style-type: none"> 1. Provide first aid treatment 2. Notify immediate supervisor, church and presbytery ministers 3. Complete incident report within 24 hours 4. Review incident, identify, assess and control hazards / risks, as identified 5. Send copy of incident report to the Synod Safety Officer by the end of the month
Medical treatment or lost time incident (Treatment required by a health professional)	<ol style="list-style-type: none"> 1. Provide first aid treatment, support person as required 2. If required – contact Ambulance Services at 000 and follow their instructions 3. Notify immediate supervisor, church and presbytery ministers 4. If ambulance transport is required, the church minister or delegate is to ensure next of kin is advised 5. Support and remain in contact with the injured person 6. If the injured person is hospitalised, advise the Synod Safety Officer by phone as soon as possible 7. Do not disturb the incident site until advised by Synod Safety Officer UNLESS it is to: <ul style="list-style-type: none"> • protect a person’s health or safety • help someone who is injured • make the area safe 8. Complete incident report within 24 hours and investigate, assess and control hazards/risks 9. Send copy of incident report to the Synod Safety Officer with 24 hours 10. Synod Safety Officer / Safety team to liaise with UC Insurance as required
Notifiable Incident (to regulator) (Serious or dangerous OHS incident or serious electrical incident/ dangerous electrical event)	<ol style="list-style-type: none"> 1. Follow medical treatment incident process for ill/injured person and/or ensure area is safe 2. Immediately notify Synod Safety Officer by phone and email 3. Notify immediate supervisor, church and presbytery ministers 4. The Synod Safety Officer will determine if a notifiable incident has occurred 5. Synod Safety Officer will provide advice and support to the congregation affected in relation to the management of the incident and the site 6. The Synod Safety Officer will notify the Health Safety & Wellbeing Director and complete the notifiable incident report to the regulator 7. Synod Safety Officer will provide guidance to the Chair Person of the church council on the management of incident site and investigation requirements 8. Where possible the Synod Safety Officer will guide the incident investigation and/or accompany the WorkSafe inspector 9. Synod Safety Officer will monitor the status of the agreed corrective actions by the congregation and update the Synod Property Services as required 10. Send copy of incident report to the Synod Safety Officer with 24 hours 11. Synod Safety Officer / Safety team to liaise with UC Insurance as required

Essential Safety Measures (ESMs)

The Uniting Church is required under the Victorian Government's Building Regulations, 2018 to ensure all Essential Safety Measures are maintained and logged so that the fire and life safety items installed or constructed in a building will continue to provide for the health and care of people over the life of the building.

All non-residential buildings in Victoria (including churches, church halls, shops, offices and kindergartens, require ESM assessments.

The Essential Safety Measures (ESMs) include items listed in Schedule 8 of the Building Regulations:

- air handling systems (used for smoke hazard management)
- exit doors
- early warning systems
- emergency lifts
- emergency lighting
- emergency power supply
- emergency warning systems
- exit signs
- fire-control centres
- fire curtains and doors
- fire extinguishers
- fire-detection and alarm systems
- fire hydrants
- fire-isolated stairs
- fire-rated materials
- fire windows
- mechanical ventilation (incorporating a cooling tower or hot or warm water system)
- fire-isolated passageways and ramps
- paths to exits
- smoke alarms
- smoke-control systems
- sprinkler systems

ESM Maintenance Schedule

An ESM Maintenance Schedule is unique to each building. ESMs will vary due to the number of floors, equipment, use and the type of building. We expect Church Councils to obtain a Maintenance Schedule which is determined by a Registered Building Surveyor for Church and Hall buildings and commercial tenancies.

This must be done as soon as possible as the legislative requirement is already in place.

For buildings built in 1994 and onwards

- Display your occupancy permit in the foyer

For buildings built before 1994 where no upgrades have been undertaken:

- Obtain a Maintenance Determination from a registered building surveyor which will outline your ESM Maintenance Schedule

For all buildings regardless of when they were built:

- Service/maintain (including testing) your ESMs in accordance with the Occupancy Permit or ESM Maintenance Schedule
- Obtain an Annual Essential Safety Measures Report. At least 12 months' evidence of testing is required to complete an AESMR. If you are not using the contractor, Statcom, email your completed AESMR and evidence to aesrm@victas.uca.org.au

Annual Essential Safety Measures Report

In Victoria, all non-residential buildings including churches and halls require an Annual Essential Safety Measures Report (AESMR).

The AESMR must be in the prescribed form (ie it must be in the format as set out in the Victorian Building Regulations).

Synod Property Services Team recommends engaging a professional (such as Statcom, but it does not need to be Statcom) who can assist you to produce the AESMR and can provide a signature on the document as an 'Agent of the Owner'.

It is a legal document and concludes with the following:

"Statement by owner - I confirm that the owner of the building and/or place has taken all reasonable steps to ensure that each ESM provided for the building and/or place:

- (i) is operating and has been maintained in a state that enables the ESM to fulfil its purpose⁴; and
- (ii) has been inspected, tested and maintained in accordance with the Building Act 1993 and the Building Regulations 20184."

You can expect a cost from Statcom to be \$850 for the first year (includes a \$250 set up cost) billed quarterly, and \$600 per year thereafter, billed quarterly (\$150 + GST).

BUT an AESMR can only be completed once you have 12 months of testing evidence available. Therefore, you still need to pay the fire services contractor to service your fire equipment such as detectors, extinguishers and hose reels and an electrician to test your illuminated exit lights. There may be further contractors needed depending on the site. For example, specialist plumbers for hydrants. You need to log all of these tests in a logbook. Statcom can assist in setting up this process.

How do we know what to test and when to test it?

You may have an Occupancy Permit (OP) for anything built after 1 July 1994 (contact your Municipal Council if your building was constructed after this date and you don't have a copy of the OP). This will include a Maintenance Schedule. A Maintenance Schedule is specific to your building and outlines what needs to be tested and how often.

If you do not have an Occupancy Permit then you will need to obtain a Maintenance Determination, which will include a Maintenance Schedule. A Maintenance Determination can only be completed by a Registered Building Surveyor. Our cost estimate through Statcom is \$1500 - \$2000 and depends on the site. It is a one off cost.

What should we do next?

Contact Statcom (or other provider) for a quote and make arrangements to approve the quote if it is acceptable to your Church Council.

If you are struggling to find the funds, Presbytery and Property Services Team are willing to meet with you to review your budget and discuss resources. Please contact us to set this up Property@victas.uca.org.au Ph: 9116 1400.

What if we do nothing?

The Uniting Church is at risk of fines should your building be audited. The Victorian Building Authority is actively campaigning for more compliance on ESMs. BUT worse, you could be endangering life in the event of a fire on your premises.

Congregation progress is being reported to the governance committees of the Synod. Congregations that are unable to produce a compliant AESMR (or demonstrate progress towards one) will come under significant scrutiny due to the risk they are posing to building users and the Property Trust.

Budgeting

Budgeting: It is recommended that Church Councils should budget for:

- \$1,500-\$2,000 (plus GST) for a Maintenance Determination and ESM Maintenance Schedule (for buildings built before 1994 only)
- \$850 (plus GST) for an Annual Essential Safety Measures Report (includes quarterly inspections)
- Further costs for the contractors who will check and maintain your ESMs – this cost is building-specific.

Compliance requirements for Renting a Residential Property

Renting of residential properties on the residential market comes with a number of obligations for the Church as a landlord. Apart from the legal requirements, as a property of the Uniting Church we have an expectation to uphold a consistent standard of property across the Synod. This includes manses made available for ministry agents.

The following checklists have been developed in line with the relevant legislation as applicable to Victoria and Tasmania.

This legislation includes:

- Victorian Residential Tenancies Act 1997
- Victorian Residential Tenancies Regulations 2019 (new regulations in force March 2021)
- Victorian Building Act 1983
- Victorian Building Regulations 2018
- Tasmanian Residential Tenancy Act 1997
- Tasmanian Residential Tenancy (Smoke Alarms) Regulations 2012
- Tasmanian Building Act 2016
- National Construction Code - NCC (formerly known as the Building Code of Australia)
- Australian Consumer Law (the property is fit for purpose)

COVID-19 Requirements

As we are living in “COVID-Normal”, it is important that all current COVID restrictions and requirements which relate to the life of the Church in line with respective State Government directives be shared among related bodies.

Synod’s Crisis Management Team has designed a Recovery Action Plan checklist and Church Facilities Reopening checklist to assist congregations in deciding if you are able to be COVID-19 and OHS compliant. Both checklists should be completed by the Church Council before making any plans to reopen your doors.

Further details and related documents can be found on the Synod’s Frequently Asked Questions web page.

<https://victas.uca.org.au/all-you-need-to-know-answers-to-your-frequently-asked-questions>

Building & Grounds Security

While insurance may cover loss of equipment or damage to buildings, we are responsible for keeping people safe as well. Congregations are advised to minimise risk by putting in place measures that provide peace-of-mind for people attending events. Security measures include what happens in your carpark or playground.

Access within buildings

- Only open doors that are close to the area being used.
- Arrange separate locks (keypad, keys or swipe cards) for different parts of the building.
- Establish a “welcoming” committee to observe, meet and greet every person entering the building.
- Secure computer and audiovisual equipment
- Regularly back up computers and store back-ups off-site.

Protecting the Perimeter

- Keep a register of who has which key, swipe card or access code.
- Make sure all doors and windows are shut and secured when the building is vacant.
- Install adequate burglar, fire alarm and lock systems.
- Secure points of entry when no events are taking place. If your facility has back entrances and/or a car park, these should be locked off.
- Install a full coverage CCTV system and motion detector lights for vulnerable areas such as doors and windows.
- Trim shrubs, bushes and trees that are near the building to reduce hiding places.
- Consider placing fencing around the perimeter of your grounds to help deter criminals – especially if you have a playground on the property.
- Make sure that you have ample exterior lighting and that those lights are on from dusk until dawn. Every door and window should be illuminated at night – motion sensor lights can help conserve energy and are often a good deterrent.

Annual Property Maintenance Inspection Checklist



Church properties must be maintained in a good and safe condition in order to meet the requirements of the Occupational Health and Safety Act 2004 (Vic) & Work Health and Safety Act 2012 (Tas) and to ensure the health, safety and well-being of all people associated with the church.

The Uniting Church in Australia Regulations require a Presbytery Property Committee to regularly inspect or arrange for the regular inspection of properties for which the presbytery and church councils are responsible, and to ensure that such properties are maintained. The church council is responsible for the management and administration of all congregational property, including the care and maintenance and other things as are necessary or appropriate for its use and management.

For more details about the checklist below, refer to the attached supplementary information.

Presbytery:	
Congregation:	
Address:	
Date inspected:	
Inspected by:	
Contact phone:	

General information / documentation

Questions	Yes	No	Additional comments
1. Do you have an Occupational Health and Safety Policy?			
2. Do you have an Asbestos Register? (please attach a copy)			
3. If Asbestos is registered, is the location of all asbestos labelled?			
4. Has your Congregation adopted ChildSafe Policies of the Uniting Church in Australia and signed the UCA Child Safe statement of commitment?			
5. Is a copy of the UCA VicTas Child Safe Policy readily available to all members and visitors including parents?			
6. When was Safe Church Training last provided to your children's and youth leaders?			
7. Do you have an Essential Safety Measures Schedule? (please attach the Annual Essential Safety Measures (ESM) Report for previous year)			

Building environment – internal/external

Questions	Yes	No	Additional comments
8. Is plant life blocking visibility of the property by passers-by or impeding safe entry or exit from the property by vehicles or pedestrians?			
9. Are car parks and footpaths lit during night meetings?			
10. Is there security lighting in place and are there lights on throughout the night? Include details about the type of lighting in the additional comments field.			
11. Are paths and/or walkways free from trip hazards, including unlevel surfaces and other obstacles?			
12. Is there disabled access into the facility (i.e. ramps)?			
13. Are any windows cracked or broken?			
14. Do all doors and windows open easily and shut completely?			
15. Are floor surfaces, carpets or mats in good condition with no loose or worn material?			
16. Are floor surfaces even, level and free from trip and slip hazards?			



Questions	Yes	No	Additional comments
17. Are internal/external steps and staircases in good condition and fitted with anti-slip tread and nosing?			
18. Are handrails or balustrades installed where required (i.e. on stairs or balconies with a fall of more than one meter)?			
19. Are all aisles, exits and access ways clear of obstructions?			
20. Are all electrical cords kept in a safe manner (i.e. clear of all aisles, exits and access ways, not dangling loosely from raised surfaces)?			
21. Are ceilings and walls in good repair (no water leakage, flaking paint, mold or mildew etc.)?			
22. Have gutters been cleaned in the past six months and down pipes unblocked free to discharge water into the storm water drains?			
23. Have drainage pits in carparks and other external areas been cleared of debris to protect against flood or backflow?			
24. Are building materials, timber pallets, cardboard, loose boards, bricks or tiles stored anywhere on the property?			
25. Are rubbish bins stored inside the buildings or secured away from the buildings?			

Electrical

Questions	Yes	No	Additional comments
26. Is a residual current device (RCD) or safety switch installed for every building?			
27. Have the RCDs been tested in the past six months?			
28. Have there been any alternative energy systems (solar, wind etc.) installed at your property?			
29. Are all light fittings, switches and power points clean and in good repair (i.e. not cracked, loose or improperly fixed to walls)?			
30. Are power boards used instead of household double adaptors?			
31. If power boards are in use, are they limited to one board per outlet?			
32. Are all power boards and extension leads in good condition (not frayed or wires exposed)?			
33. Has all portable electrical equipment been inspected, tested and tagged by a qualified electrical worker?			
34. Are appliances well-maintained and operating correctly (fridges, microwaves etc.)?			

Ventilation and amenities

Questions	Yes	No	Additional comments
35. Are church members satisfied with building ventilation (i.e. thermal comfort, air quality)?			
36. If property is air-conditioned, are filters and vents regularly cleaned and systems maintained by a qualified technician? You should aim to have your cooling system serviced at least once every year.			
37. Are property amenities hygienically cleaned (i.e. kitchen, toilets and showers)?			
38. Is all furniture in good stable condition (chairs, pews etc.)?			



First aid and emergency procedures

Questions	Yes	No	Additional comments
39. Do all emergency exit doors have illuminated signage above the door?			
40. Are all emergency exit doors of a single lever or push bar action to open?			
41. Are all emergency exit doors free of slide bolts, internal key locks, padlocks etc.?			
42. Are all fire extinguisher and fire hoses easily accessible?			
43. Have extinguishers, hose reel hydrants and fire blankets been serviced in the past six months or in accordance with the Essential Safety Measures Schedule?			
44. Do you have emergency lighting in addition to illuminated exit signs to ensure a safe evacuation during an evening meeting?			
45. Have the signs and emergency lighting been tested, in accordance with the Essential Safety Measures Schedule?			
46. Are emergency and fire evacuation procedures clearly displayed?			
47. Are leadership volunteers and workers trained in the evacuation procedures?			
48. Has a fire drill been conducted in the past year?			
49. Is there a first aid kit and is it accessible to all members?			
50. Do you have designated first aid officers and are their contact details kept with the first aid kits and displayed on your safety notice board?			
51. Are contents of the first aid kits appropriate for the property and its activities, and regularly checked and maintained? (consider additional equipment in bushfire or flood zones)			
52. Are first aid kits appropriately labelled (i.e. marked with a white cross and green background)?			

Insurance and security

Questions	Yes	No	Additional comments
53. Have there been any security issues during the year? If so have they been resolved?			
54. Is there a security alarm installed? In the additional comments field, advise whether this is a local alarm or monitored by a security firm.			
55. Is the computer and multimedia equipment secured?			
56. Are computer systems regularly backed up, and backups kept off-site?			
57. Has your key register been reviewed in the past 12 months? In the additional comments field, advise how many people have keys to the property.			
58. Are the facilities regularly used by other church groups, agencies or the general community?			
59. Is there a current UCA-endorsed hire agreement in place with all groups who use the property?			



Child safety

Questions	Yes	No	Additional comments
60. Do children attend your church?			
61. Has work been undertaken to make the environment child safe?			
62. Do all cupboards and drawers which store sharp and hazardous materials (cutlery, glass, plastic bags etc.) have child-resistant catches?			
63. Are electrical and gas appliances, particularly kitchen appliances and power tools, inaccessible to children?			
64. Are safety plugs used in all power points that are not being utilized?			
65. Are all sources of hot and boiling water inaccessible to children?			
66. Are all chemicals, fuels and hazardous substances securely stored?			
67. Are all hazardous substances and dangerous goods properly labelled and stored in accordance with the Safety Data Sheet (SDS)?			
68. If applicable, is the children's playground and equipment regularly maintained and free from hazards and debris?			

Hazardous Materials

Questions	Yes	No	Additional comments
69. Is there a register of Hazardous Substances and Dangerous Goods stored on site?			
70. Do leadership volunteers and workers know where to obtain information for substance use and emergency response?			
71. Have volunteers and workers been trained in safe handling, spillage, storage and disposal of chemicals?			
72. Are Safety Data Sheets available for all hazardous substances and dangerous goods in use at the property? Current?			
73. Have assessments been undertaken for all hazardous substances and dangerous goods in use on site to ensure they are stored and used in accordance with the requirements?			

Additional comments

For assistance to complete your checklist, contact the Synod Safety Officer. Please retain the original completed checklist with your congregation's own property records and forward copies to your presbytery office and Synod property services.

Keeping Children Safe

The Keeping Children Safe policy (May 2017) applies to all entities and individuals associated with the Uniting Church in Australia – Synod of Victoria and Tasmania despite the diversity of those who engage in child related services or activities or even has an occasional encounter with their grandchildren coming to church for special events.

Entities of the Church include, but are not limited to: Congregations, Presbyteries, Synods, the Assembly, agencies, ministries, childcare services, out-of-home care services, family and community services, disability services, health services, camps and schools. It will be implemented by board/council members, employees, volunteers, children, parents, carers, presbytery members, church council members, elders, congregation members, people in the specified ministries of the Church, and any other person with responsibility for the care of children.

Please note that by making your congregation a safe place for children, you make it a safe place for everyone. The safety of children has to be maintained accordance with the Occupational Health Standards to keep your entities safe for all people (ref. B. Compliance I. OHS)

Synod has provided compliance guidelines and resources online:

<https://ucavictas.org.au/keepingchildrensafe>

Several important policies guide our work such as the Keeping Children Safe and the Working With Children Check/Registration Policy.

The following documents will help you set policies in your own place to ensure you are taking the right steps to keep children safe.

UCA Child Safe Policy

<https://ucavictas.org.au/keepingchildrensafe/wp-content/uploads/2021/12/UCA-Child-Safe-Policy-Synod-of-VicTas.pdf>

Resources to Assist with Implementing Policy Actions

<https://ucavictas.org.au/keepingchildrensafe/resources/>

Working With Children Check/Registration Policy

<https://ucavictas.org.au/keepingchildrensafe/wp-content/uploads/2017/08/WWCI-Working-With-Children-Check-Policy-10AUG2017.pdf>

Occupational Health and Safety (OH&S)

<https://ucavictas.org.au/keepingchildrensafe/wp-content/uploads/2017/06/SPSPI-Occupational-Health-and-Safety-I.pdf>

OH&S Incident Reporting Form

<https://ucavictas.org.au/keepingchildrensafe/wp-content/uploads/2017/10/SPSPI-OHS-Incident-Reporting-Form.pdf>

Reportable Conduct Policy

<https://ucavictas.org.au/keepingchildrensafe/wp-content/uploads/2018/06/Reportable-Conduct-Policy-JUNE2018.pdf>

C. Renting/Leasing

General Instructions on Leasing a Property for Responsible Bodies in the VicTas UCA Synod

No agent has any authority to offer a new lease without written permission from the Responsible Body landlord (congregation, presbytery etc). This permission can only be granted if a valid Property Application Review Team (PART) approval stands.

All residential lease PART approvals have a life of two years only. Paper copies are not required. A scanned copy of the signed lease is sufficient. If a paper copy is sent the document will be scanned and the paper copy shredded.

PART operates via scanned or .pdf electronic images of the original. Hard paper copies are no longer used or stored. Only on commercial leases where a seal is required will the paper copy be sent.

I. Memorandum of Understanding (MOU)

The Uniting Church has since 1985 made provision for sharing of property between congregations, with particular reference to being a multicultural church. The UCA regulations include this policy. Here's a small section of those regulations:

Where two or more congregations or faith communities share, or will share, the use of a church property that is under the management and administration of a Church Council of (one of) the congregation(s), they will enter into a culturally sensitive memorandum of understanding (not a tenancy agreement) that shall

- (a) specify usage rights of each Congregation or faith community;
- (b) provide for an appropriate sharing of costs; and
- (c) specify the manner in which the responsibilities listed in Regulation 4.4.1 and other relevant Regulations of the Church will be jointly undertaken in respect of the shared property.

The Memorandum of Understanding (MOU) will be negotiated in consultations between the participating Congregation(s) (through their Church Council(s)) and faith community/ies and their Presbytery or Presbyteries, taking into account the ministry and mission needs of each participating congregation and faith community and any relevant policies of the Assembly and the Synod.

2. Hirer Agreement

The agreement is for a hall/meeting room hire or similar arrangement using church premises for one-off use or regular use for a consecutive period of less than 12 months (including any previous occupancy). The Hirers Agreement has to be renewed every year. If the agreements are longer than 12 months, you have to contact Synod Property Services. No Hirer Agreement is required for activities or events held, or arranged for, or on behalf of, the local Church Congregation.

What goes in a hirer's agreement?

- Details of Church and User (User is a company with ACN number or an individual)
- Terms of Agreement between Church and User (hired area to be used, scheduled hours, hire fee, frequency of use, etc)
- Conditions of Use
- Copy of an Insurance Certificate of currency from User or Hirer's Public Liability Insurance with UCA
- Annexure pages for evacuation plan and safety rules and layout for hired area

You can find the fillable PDF template for this on the Synod website:

<https://victas.uca.org.au/download/58/property-application-forms/9412/hirer-agreement-victoria>

3. Leasing Residential Property

A lease is a legal document protecting the landlord and the lessee, outlining the financial and property commitments for both landlord and lessee.

When do you need a lease?

The cases vary depending if the church is leasing a residential property

- To an external tenant (lease is required)
- To a UCA minister from another congregation (Memorandum of Understanding is required)
- From an external person or real estate agent for a minister to live in (lease is required)

Every lease has to be signed by the Uniting Church Property Trust (Victoria) as the legal representative of the Uniting Church.

This application process is to be completed when a Responsible Body is seeking to lease a property which is to be occupied as a residence. This application does NOT require a 'Form I - Getting Started' or a Pre- Application Meeting (unless advised by Property Services due to complexity).

'Residential Application to Lease' Form 3ER has to be completed, forwarded to PART through the Presbytery Property Committee.

Land Tax

You may need to pay land tax if you own an investment property, holiday home, commercial property or vacant land. If you have leased your property to be used largely for commercial purposes, then land tax is likely to be incurred.

State Revenue Office on Land Tax

sro.vic.gov.au/land-tax

4. Application to Lease Forms

Two forms are available on the Synod Website. These forms (and all the new suite of Property Forms) are in a .pdf format which is capable of having relevant text inserted into the Form and saved. Link to Synod website for Forms as below.

<https://victas.uca.org.au/resources/property/forms-and-resources>

Form 3ER is used for an Application to Lease – Residential when a Responsible Body is seeking to lease a property which is to be occupied as a residence. This applies whether the property is owned by the Synod or where the Responsible Body is seeking to Lease a property as a residence.

For renewal of existing leases, only certain sections of the form will need to be completed.

This form does NOT require that a 'Form I - Getting Started' be completed and does NOT require a Pre Application Meeting (unless advised by Property Services due to complexity).

If it is proposed that the property will be used for a Rooming House or for any other purpose than a residence (e.g. office, church, medical clinic) a 'Form I – Getting Started' MUST be submitted. This will initiate a Pre Application Meeting with the Presbytery Property Committee and may involve Synod Property Services.

Form 3EC is used for an Application to Lease – Commercial when a Responsible Body is seeking to lease a property to be used for non-residential purposes e.g. Commercial, Retail, Church or Op Shop. This form also covers Assignment of Lease, License Agreements for terms longer than 12 months and Memorandums of Understanding (MOUs) for the use of property where both parties are in the name of the Property Trust (e.g. between congregations).

No individual is able to commit to lease terms when negotiating with a potential tenant/landlord.

All negotiated terms are subject to approval by Presbytery and the Synod Property and Operations Committee or its delegate.

5. Checklist – Renting out a residential property

Property Services Pre PART Due Diligence Check List

- Is the property in a state of good repair, watertight and all services and fit out operable and working correctly?
- Is the property fit for intended purpose and safe to occupy (poses no risks to occupants)?
- Have all gas appliances been serviced by a VBA (Victorian Building Authority) licensed Gas Fitter/Plumber and CO (Carbon Monoxide)? Has a safety test been performed every 2 years? Please provide evidence.
- Are the premises fitted with smoke detectors throughout to provide protection for all bedrooms? Often the property will require more than one detector. Hard-wired smoke alarms with a battery back-up must be installed in all buildings constructed after 1 August 1997 in compliance with Australian standards AS 3786. Buildings constructed before that date can have a battery-powered smoke alarm.
- Have all installed smoke detectors completed an annual service and test by a REC (Registered Electrical Contractor) or a suitably licensed Fire Services technician? Please provide evidence.
- Are all installed electrical appliances and fixtures serviceable, safe and operate correctly without fault as when new?
- Is the property fitted with strong locks on all exit doors that provide good security (dead locking) and easy to operate in case of emergency escape from inside the property?
- Are entrances and exits including porches, verandas, hand rails, doors and stairs safe and free of any fault and from obstruction?
- Are all windows serviceable, able to be opened and closed and can be securely locked. Are blinds provided for blackout?
- Is there a financial Maintenance Provision to set aside into an accumulating maintenance fund? Synod Standing Committee resolution (20th Aug 2008) every Council responsible for maintenance of a manse set aside 15%. Property Services recommends that an allowance of \$4,000 or 20% (the greater of the two) be set aside each year into an accumulating maintenance fund.
- Do you have at least two local real estate agent's appraisals for the property and a costs and market proposal?
- The agent's commissions should be in the range as follows, if the agent offers lower commission obviously that is acceptable.
 - Rural Properties: 6% to 8% including GST.
 - Metro Properties: 5% to 7% including GST.
- The fixed rental lease agreement cannot be longer than 24 months and no less than 6 months. Short term rentals will be difficult to tenant and attract a lower rental rate.

6. Approval Process for Leasing Residential Property

Phase & Forms	Description
Phase 1 Form 1 – Getting Started	<p>A Form 1 is required if the property has not been leased previously. It outlines the missional direction behind leasing the property and enables the church entity to explain the process that led to the initial idea. The form also enables the entity to explain the reason behind why the property is vacant, or why the entity doesn't have or can't use existing residential premises.</p>
Phase 2 Form 2A – Discerning and Deciding	<p>A Form 2A enables a further exploration of the missional use of a property and the reasoning behind leasing. This form is required if the property has not been leased previously, and to further detail the intention to lease with the entity's mission. This form is also used to reevaluate the missional integrity of a longstanding lease arrangement.</p>
Phase 3 Form 3ER – Application to Lease Residential	<p>The Form 3ER is for detailing the lease arrangement. This application is where you inform us of the specific details of the lease such as the rent, the term and current market value. The information in this form enables us to assess whether it is good stewardship of our shared resources. This resource could be UCA property (most commonly a manse) or funds which would be utilised to pay rent.</p>
Phase 4 Submitting Documents for signature by the Property Trust	<p>Once approval is formalised the next step is to submit the documentation for signature. A Residential Tenancy Agreement is the final step in officiating the arrangement and has to be forwarded to Property Services for signature. If the UCA is the landlord then the Leasing and Managing Authority also has to be forwarded for signature.</p>

7. Approval Process for a Memorandum of Understanding

Phase & Forms	Description
Phase 1 Form 1 – Getting Started	A Form 1 is required if the UCA entity hasn't previously entered into a Memorandum Of Understanding (MOU) arrangement with another arm of the church. The form outlines the missional direction behind sharing property with another UCA entity and enables the beneficial user to explain the process that led to the initial idea of housing another UCA entity on the site.
Phase 2 Form 2A – Discerning and Deciding	A Form 2A enables a further exploration of the missional use of a property and the reasoning behind entering into a MOU agreement with another UCA entity. This form is required if the entity is entering into an MOU for the first time or to reevaluate the missional integrity of a longstanding Memorandum of Understanding.
Phase 3 Form 3ER – Application to Lease Residential	The Form 3ER is for detailing the arrangement. This form is where you notify us of the specific details of the MOU such as any monetary contribution, the term, and the responsibilities of both parties. The information enables us to assess whether it is good stewardship of our resources -ensuring that the arrangement is mutually beneficial. Please attach the draft MOU and complete only those sections which apply. Once approved, the funds are invested with UCA Funds Management and are under the oversight of Accounting Services.
Phase 4 Finalising the Memorandum of Understanding document	Once approved, the funds are invested with UCA Funds Management and are under the oversight of Accounting Services. Payments are distributed half yearly in accordance to the UCA Funds Management distribution of interest earned. Near the completion of the allotted time, the project is to be reviewed by the Responsible Body and the discernment partner, and reapplication for continued or new projects is necessary.

8. Approval Process for Leasing Commercial or Retail Property

Phase & Forms	Description
Phase 1 Form 1 – Getting Started	A Form 1 is required if the property has not been leased previously. It outlines the missional direction behind leasing the property and enables the congregation to explain the process that led to the initial idea. The form also enables the entity to explain the reason behind why the property is vacant or why the entity doesn't have or can't use existing commercial or retail space.
Phase 2 Form 2A – Discerning and Deciding	A Form 2A enables a further exploration of the missional use of a property and the reasoning behind leasing. This form is required if the property has not been leased previously and to further detail the intention to lease with the entity's mission. This form is also used to reevaluate the missional integrity of a longstanding lease arrangement.
Phase 3 Form 3EC – Application to Lease	The Form 3EC is for detailing the lease arrangement. This form is where you inform us of the specific details of the lease such as the rent, the term and current market value. The information in this form enables us to assess whether it is good stewardship of our shared resources. This resource could be UCA property (such as a shop or office space) or funds which would be utilised to pay rent.
Phase 4 Submitting Documents for signature by the Property Trust	Once approval is formalised the next step is to submit the documentation for signature. A Commercial or Retail Lease is the final step in officiating the arrangement and has to be forwarded to the Property Trust for execution. If the lease falls under the Retail Leases Act, then the landlord has to provide the tenant with a Disclosure Statement and that too must be executed by the Property Trust.

Information on PREPARING BUILDINGS FOR COMMERCIAL LEASE can be found
<https://victas.uca.org.au/download/304/property-key-information-sheets/6808/preparing-buildings-for-commercial-lease>

D. Selling & Buying

Real Estate Advisory Services guides and assists Church entities with the complex issues involving buying and selling property, as well as ongoing management of Church assets.

Its aim is to support you and to extract best value from the marketplace, without compromising quality or adding unnecessary cost to entities.

I. Selling a Property

The Synod Property and Operations Board has introduced the Enhanced Governance Process for disposal of Church property/asset sales in order to achieve the best possible outcome for church entities. Any property/asset sale more than \$500,000 is required to have a co-agency agreement with the Real Estate Advisory Function at Synod Property Services.

The REAF will:

- work with the Church entity to seek and appoint appropriate and credible real estate agents.
- work with the Church entity to seek marketing submissions from at least two credible estate agents.
- negotiate sharpened sales agent commission rates and advertising schedule rates on behalf of the Church entity.
- oversee the sales process, giving advice to the Church entity as required.

Outlined below are key points to consider when selling property.

- Owner building requirements
- Valuations
- Choosing an agent
- Auction, Private Treaty and Expressions of Interest
- Contracts of sale
- Build, pest reports and surveys

The Synod Property Services team, in liaison with the Presbytery Property Committee, can help guide you through the whole process, including appointing a professional consultant, negotiating consultant rates, marketing campaigns, and advice on the method and negotiation of sale.

Access to Property Sale Proceeds (PSP)

Congregations may access proceeds from the sale of church property to assist with a range of projects, including:

- Capital projects – including repair, refurbishment and redevelopment of existing property, plus buying new property.
- In certain circumstances, a congregation may access the capital for non-capital purposes. These include projects of high missional priority and, for small rural congregations, operational purposes to extend ministry in the region.
- Assistance with the payment of a manse allowance. The proceeds from the sale of a manse may be reserved for manse purposes, either to buy a new manse or to invest the funds and use the interest earned to assist with Manse Allowance payments to the minister in placement.
- Investment of proceeds into an Interest Only Mission Fund (IOMF), whereby the interest earned is distributed to support a specified and approved mission project.

Wider Church Sharing

When a property that is not a manse is sold for the responsible body and the Synod of Victoria/Tasmania are both allocated a percentage of the property sales proceeds. When a congregation sells a manse they can use the proceeds to purchase another manse. Funds that are not used for this purpose are then considered for wider church sharing.

Property Sale Value	Responsible Body	Wider Church
less than \$200,000	95%	5%
over \$200,000, less than \$2 million	55%	45%
over \$2 million, less than \$4m	40%	60%
over \$4 million	20%	80%

Access to Property Sale Proceeds

Congregations may access proceeds from the sale of church property to assist with a range of projects, including:

Capital projects – including repair, refurbishment and redevelopment of existing property, plus buying new property.

In certain circumstances, a congregation may access the capital for non-capital purposes. These include projects of high missional priority and, for small rural congregations, operational purposes to extend ministry in the region.

Manse – The proceeds from the sale of a manse may be reserved for manse purposes, either to buy a new manse or to invest the funds and use the interest earned to assist with Manse Allowance payments to the minister in placement.

Investment of proceeds into an **Interest Only Mission Fund**, whereby the interest earned is distributed to support a specified and approved mission project.

Please note any building works or property purchase will also require the separate approval of the project scope and costing.

Money for Mission (MFM)

Under the Money for Mission Program, a new fund has been established with the monies raised from the sale of properties excess to missional needs. Invested net sales proceeds will generate returns greater than net rental income in the case of rental properties, or for other property sales, greater than the income that would be received by investing after sharing in an IOMF.

Investments are made in the name of the Responsible Body and

The primary purpose of this investment is to generate and distribute proceeds for:

1. Income replacement for congregations/ Responsible Bodies
2. Presbytery funding
3. Assembly funding
4. Synod missional funding
5. Wider Church missional grants
6. Uniting Aboriginal and Islander Christian Congress

2a. Approval Process for Sale of Property

Phase & Forms	Description
Phase 1 Form 1 – Getting Started	Form 1 is the starting point for all applications. This is a tool for church entities to consider the context of the community beyond themselves, the process that leads to the initial idea and how this fits with the vision of mission and/or ministry opportunities of the applicant. By submitting this form early in the process, this allows for other councils of the church to provide early feedback. When considering the sale, it is also advisable to consider how the proceeds will be used.
Phase 2 Form 2A – Discerning and Deciding	Form 2A documents the discernment between the congregation and presbytery (or applicant and discernment partner) and facilitates development of the initial project idea to a more defined plan of action and how this idea responds to the overall missional vision and strategy. This involves considering how the sale fits with the long term strategy of the congregation, the intended use of sale proceeds and how the overall project will enhance mission and ministry in that community.
Phase 3 Form 3F– Application to Sell	Form 3F collates all the details of the sale for approval of the project. Additional information required to support the application includes: market valuation including commission schedule and suggested selling date, and documents required for preparation of the Section 32. If a church is being sold due to a closed congregation, please advise which congregation, parish or presbytery is to be the Responsible Body for the property sale proceeds. For property sales over the value of \$500,000 a co-agency agreement is required between Property Services and the Real Estate Agent.
Phase 4 Post Approval	All contracts, such as the exclusive sale authority, must be forwarded to this office for signature by the Property Trust. Please ensure that any documents are completed with the owner shown as the appropriate Property Trust. Synod Legal Services will prepare the Section 32 document and sales contract. Once an offer is accepted, Synod Legal Services will assist with finalisation of the sale.

2b. Approval Process for Money for Mission Sale of Property

Phase & Forms	Description
Phase 1 Form MFM A	Form A is used as an expression of interest or intention to invest funds in Money for Mission from sale of property, transfer of funds from Interest Only Mission Fund (IOMF) or allocation of existing property sales proceeds. The form is filled out by the responsible body and submitted through the Presbytery Property Committee to Synod Property Applications Review Team (PART)
Phase 2 Form MFM B	Property Services Team works on the details with the responsible body to provide a proposal for consideration and approval. If property sale is involved Form B includes market valuation including commission schedule and suggested selling date. The appropriate governance body (Church Council, Presbytery Standing Committee, etc) approves the terms and sends the complete MFM Form B back to PART. If property sales are being considered then this is sent via the Presbytery Property Committee.
Phase 3	For property sales over the value of \$500,000 a co-agency agreement is required between Property Services and the Real Estate Agent.
Phase 4 Post Approval	All contracts, such as the exclusive sale authority, must be forwarded to this office for signature by the Property Trust. Please ensure that any documents are completed with the owner shown as the appropriate Property Trust. Synod Legal Services will prepare the Section 32 document and sales contract. Once an offer is accepted, Synod Legal Services will assist with finalisation of the sale.

3. Buying a Property

The initial step requires to complete Form 1 'Getting Started' and Form 2A 'Discerning and Deciding prior to completing Form 3G 'Application to Purchase'.

Congregations, Presbytery and agencies will be involved in the process and the completed form has to be forwarded to Property Services (PS) by the Discernment Partner (Presbytery or UCA Vic/Tas) as applicable. In the process, your Current financial position, funds availability, project funding and Property Sales Proceeds (PSP) will be considered.

The Synod Property Services team, in liaison with the Presbytery Property Committee, can help guide you through the whole process you will need when buying a property, from valuations to acquisition feasibilities, environmental audits and contracts of sale.

The outlined below are the key points to consider when BUYING A PROPERTY:

- Checking the contract
- Build and pest reports
- Property valuation or appraisal
- Residential property
- Commercial premises
- Vacant land
- Environmental/ contamination audits
- Stamp Duty

Real Estate Institute of Victoria

reiv.com.au

State Revenue Office on Stamp Duty

If you buy or acquire a property, you pay land transfer duty, commonly known as stamp duty.

The Duties Act 2000 provides exemption from duty for a transfer of dutiable property to a corporation or body of persons established for a religious, charitable or educational purpose, or a friendly society (s45)

sro.vic.gov.au/land-transfer-duty

4. Approval Process for Purchase of Property

Phase & Forms	Description
Phase 1 Form 1 – Getting Started	Form 1 is the starting point for all applications. This is a tool for applicants to consider the context of the community beyond themselves, the process that lead to the initial idea and how this fits with the vision of mission and/or ministry opportunities of the applicant. By submitting this form early in the process, this allows for other councils of the church to provide early feedback.
Phase 2 Form 2A – Discerning and Deciding	Form 2A documents the discernment between the congregation and presbytery (or applicant and discernment partner) and facilitates development of the initial project idea to a more defined plan of action and how this idea responds to the overall missional vision and strategy. For purchase of property, this relates to the reasoning for the purchase, how it will be funded, how it fits with the congregation’s long term strategy and how it enhances missional opportunities.
Phase 3 Form 3G– Application to Purchase	Form 3G collates all the details of the purchase for approval of the project by the councils of the church. Additional information required to support the application includes: site plan, property advertisement, copy of Section 32 (if available) and financial information supporting how the purchase will be paid, to include the relevant funding application form. Prior to final approval by the Property Board, or its delegated subcommittee, the application will be reviewed by Property Services.
Phase 4 Post Approval	Before an offer is made on the property, it is essential that the finance is approved and in place. Property Services have experience in Real Estate and are able to provide advice and assist as required. All contracts must be forwarded to this office to be signed by a member of the Property Trust. Please ensure that any documentation shows the owner as the appropriate Property Trust. Once an offer is accepted, Synod Legal Services will assist with finalisation of the sale.

E. Building, maintenance and minor works

If the congregation has cash on hand for works up to \$50,000 and a building permit is not required, then the congregation can proceed without Property Board approval for a permit, provided the appropriate Presbytery processes and approvals are followed.

If the project requires access to Property Sale Proceeds, a grant and/or a loan then refer to the process for minor works (less than \$1 million). The following building approval limits have been set and approved by the Synod.

All contractors working on or at Church facilities must undertake an Online Safety Induction training course and sign the contractor and tradesman handbook before entering UCA facilities or beginning work.

I. Minor Builds (<\$1m)

This process is necessary when the responsible body wants to do the following works to the church properties.

- Renovation
- Maintenance
- Extension
- Repair
- Demolition

Over \$20,000, approval from Presbytery Property Committee is required.

Over \$50,000 approval from PART is required.

The 'Form I - Getting Started' has to be completed in this process and a Pre-Application Meeting between Church Council, Presbytery and Property Services is necessary (please note the Pre-Application Meeting can occur by teleconference). Completion of Form 3H (Application to Build: projects not requiring business case) will be required.

Cost of works	Approval Required
Works not requiring a building permit, use of property sales proceeds/grants/loans or formal building contracts (fully funded by the congregation)	
\$0 – \$10,000	Approved by Church Council
\$10,000 – \$20,000	Approved by Church Council Presbytery Property Committee advised before beginning
\$20,000 – \$50,000	Approved by Church Council & Presbytery Property Committee
Over \$50,000	Approved by Church Council, Presbytery Committee, & Synod Property Applications Review Team (PART) on behalf of Synod Property Board

Works requiring a building permit	
Any amount	Approved by Church Council, Presbytery Committee, & Synod Property Applications Review Team (PART) on behalf of Synod Property Board

Fully funded by the congregation by property sale proceeds or loan	
Any amount	Approved by Church Council, Presbytery Committee, & Synod Property Applications Review Team (PART) on behalf of Synod Property Board

2. Approval Process for Minor Builds (<\$1m)

Phase & Forms	Description
Phase 1 Form 1 – Getting Started	Form 1 is the starting point for all applications. This is a tool for applicants to consider the context of the community beyond themselves, initial thinking around the project being considered and how this fits with the vision of mission and/or ministry opportunities of the applicant. By submitting this form early in the process, this allows for other councils of the church to provide early feedback.
Phase 2 Form 2A – Discerning and Deciding	Form 2A documents the discernment between the congregation and presbytery (or applicant and discernment partner) and facilitates development of the initial project idea to a more defined plan of action and how this idea responds to the overall missional vision and strategy. For building works, this relates to the long term strategy of the whole property, why the works are necessary, how it is intended that the project will be funded and how the works will enhance mission and ministry in that community.
Phase 3 Form 3H - Application to Build	Form 3H collates all the details of the project for approval of the project by other councils of the church such as presbytery or UCVT, and the Property Board. Additional information required to support the application includes: sketch plans, site plan, project costing (quote or QS assessment) and financials. Prior to final approval by the Property Board, or its delegated subcommittee, the application will be reviewed by staff of Property Services to ensure that all information has been provided and that finer details of the project are satisfactory.
Phase 4 Post-Approval	All contracts must be forwarded to this office to be signed by a member of the Property Trust. If finance has been approved concurrent to this application, then you will receive a 'Request for Payment' form to complete and submit with invoices for payment to the service provider. During the course of the project, Property Services is available to provide advice as needed and assistance to ensure completion within the project budget.

3. Projects & Development (Major Building Projects & Development)

This application process is required for a building works project which is complex and/or the cost of works is more than \$1 million.

The application process requires to complete

Form 1 'Getting Started'

Form 2A 'Discerning and Deciding and the establishment of Project Control Group (PCG).

The Project Business Case Form 2B has to be completed by the nominated Project Control Group (PCG) based on information of the high level concept stage of the proposed capital works project.

Then the form has to be submitted by the Responsible Body (Applicant) to the Discernment Partner (as applicable, usually the Presbytery), and once endorsed, then it is forwarded to the Synod Property Services for consideration by the Property Board.

Property Services offers assistance with projects of all sizes and risk profiles. The projects vary from small renovations, to major constructions and full site redevelopments, which include affordable and community housing, and educational facilities.

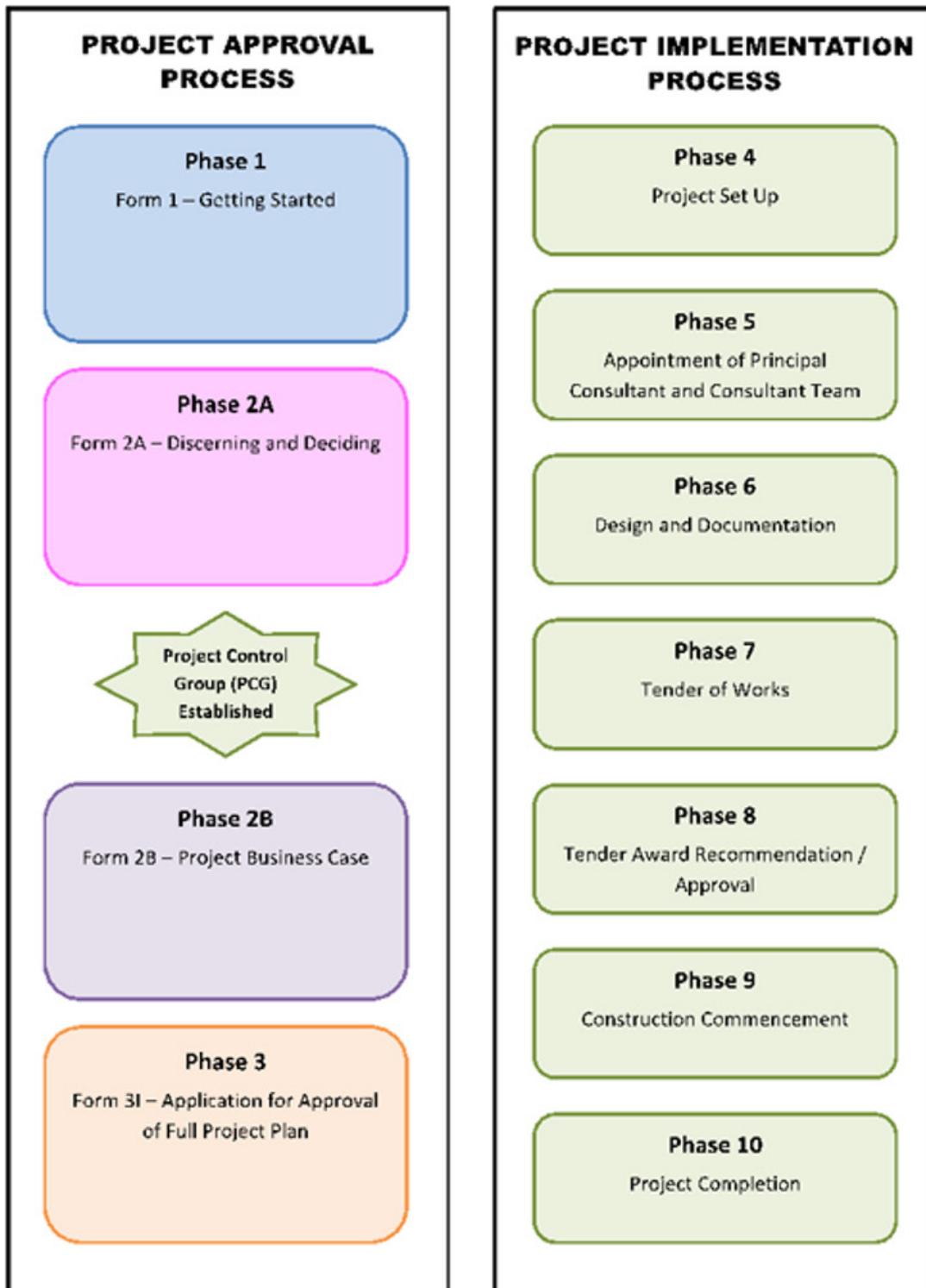
A governance structure has been developed to assist Church entities with complex building projects that are expected to cost more than \$1 million. The structure alleviates inherent risks.

4. Project Governance Structure

The application process for projects over \$1 million has two separate stages:

The project governance structure consists of two phases for projects over \$1 million:

- project approval
- project implementation



5. Project Approval Process

Mission is the first consideration for all proposed projects developments, The first two phases of the project approval process specifically focus on 'mission-motivated development (refer to "Mission" section).



Phase I Getting Started

Phase I involves completing the Getting started form, which provides a summary of vision and mission. The form must be completed by the applicant and discernment partner (either a presbytery minister or UnitingCare Victoria and Tasmania representative). Approval comes via the discernment partner and PART.

Responsibility for the completion of the form falls with the Applicant and the Presbytery Property Committee.

The form provides a summary of vision, mission, and idea of the project.

Approval is in the form of endorsement/feedback from Discernment Partner and PART.

Phase 2A Presbytery Discernment

Phase 2A involves completing the Presbytery discernment form.

The form should be completed by the applicant and discernment partner. The process is approved with the endorsement/feedback from PART. If the project cost is more than \$2 million, Property Board approval is required.

Requirements for the form include:

- Mission Motivated Development Summary
- Discernment Summary
- Mission Objectives
- Financial Indication
- 'Mud Map' / Architect
- Quantity Surveyors report

Form 1 – Getting Started

The 'Form 1 - Getting Started' is Step 1 in the property approvals process. It is the basis of the Pre-Application Presbytery and Property Services. It generally does not apply to residential leases, sales, or works under \$20,000 permit is required, no hazardous material ie asbestos, below 2m in height, no heritage consent needed – if not Property Services Project Managers for advice 9116 1954 or 9116 1952). For further information please contact Presbytery or Property Services www.victas.uca.org.au/resources/property/ , property@victas.uca.org.au . **Property Services strongly advises that no consultants, architects or designers be engaged at this early stage. Funds are not spent on unnecessary advice or drawings that do not meet requirements.** Complete hard copy or electronically using ONLY Adobe software, available free at <https://acrobat.adobe.com/ou/en/acrobat/pdf/>.

CHECKLIST:

- Prepare and Sign 'Form 1 – Getting Started'
- Attach Summary of property under oversight of Responsible Body and how property is used (this will help understand how your idea fits in with how you currently use ALL your properties)
- Attach most recent audited financial statement & current year budget (balance sheet & 5yr forecast available)
- Make contact with Presbytery to confirm a Pre-Application Meeting with Presbytery and Property Services

If you require more space for your answers, please attach additional pages to this form

1. RESPONSIBLE BODY

Responsible Body Name			
Contact Person			
Position			
Email			
Phone	Ph		Mobile
Address (Postal)			
Presbytery			

2. YOUR IDEA

Please provide a summary of the proposed idea

Project Name (if applicable):

Please provide address(es) of property relating to this application

CHECKLIST:

- Sign 'Form 2A – Presbytery Discernment'
- Attach Additional documents as agreed at the Pre-Application Meeting

If you require more space for your answers, please attach additional pages to this form

1. PROJECT DETAILS

Project Name	
Responsible Body	
Date of Pre-Application Meeting	

2. DISCERNMENT PARTNER

Presbytery*	
Representative Name	
Position	
Email	
Phone	Ph
Address (Postal)	

* Where Presbytery is the Responsible Body the Mission Officer Property or appointee acts as the Discernment Partner.

3. PROPOSED PROJECT/ WORKS

Please advise why the Presbytery supports/does not support the proposed idea

Presbytery Review	COMMENTS
a. Presbytery to receive and review the Mission Plan	
b. Presbytery to receive and review the congregation's financial statements	
c. Presbytery to receive and review the congregation completed Property for Mission Workbook (if applicable)	



Form 2A – Presbytery Discernment

2A

The 'Form 2A – Presbytery Discernment' is to be completed by the Presbytery in the role of Discernment Partner. It is intended to summarise the outcomes of the discernment between the Presbytery and the Responsible Body which is wishing to undertake a property related project/works. When completed the signed 'Form 2A – Presbytery Discernment' is forwarded to the Property Applications Review Team (PART). For further information please contact your Presbytery or Property Services property@victas.uca.org.au , Ph: 9116 1956. Complete hard copy form or electronically using ONLY Adobe software, available free at <https://acrobat.adobe.com/au/en/acrobat/pdf-reader.html>

Project Control Group

Once PART or Property Board has endorsed Form 2A, the Project Control Group can be established.

The PCG is responsible for making the everyday project decisions.

The Project Control Group consists of:

- 3-4 local applicant representatives.
- 1-2 representatives from Presbytery Property Committee
- Synod Development projects manager.
- Project manager

When the project is approved, the PCG governs though the implementation process, which includes the production of monthly PCG Reports including:

- Financial summary
- Program
- Risk schedule

Furthermore, the PCG is tasked with producing the next two phases of the approval process.

Phase 2B Project Business Case

Phase 2B involves the completion of Form 2B – Project Business Case.

Requirements for the form include:

- Brief/Objectives of Proposal, including Mission Motivated Development (MMD) and Commerciality
- High Level Concept Scheme
- Quantity Surveyor (QS) Indication (Cost Plan A)
- Program of Project i.e. timeframes and milestones
- Funding identified i.e. government, Synod Grants, PSP, other funds, etc.
- Partners (government/agency)
- Interim appointment of consultants
- Feasibility Cash Flow

Form 2B will be reviewed and recommend by PART, with final approval by Property Board if in excess of \$2 million. If the project is \$2 million - \$5 million, approval is also required from the Synod Finance Committee prior to review by Property Board.

Property Services can provide Projects and Development assistance to congregations and agencies. An options analysis can be developed for the highest and best use of the property to facilitate their missional and functional requirements.

Upon completion, the form should be reviewed and recommended by PART, before being sent to Synod Property Services for Property Board Approval if in excess of \$2 million. If the project is >\$5million, approval is required from Synod Finance Committee prior to review by Property Board.



Property Services (PS)	2B
PROJECT BUSINESS CASE	
<p>Filling in this form is the next step in the process for a building works project, which is complex and/or the cost of works is <u>more than \$1 million</u>.</p> <p>This form is to be:</p> <ul style="list-style-type: none"> • Completed after Form 1 "Getting Started", Form 2A "Discerning and Deciding" and the establishment of a Project Control Group (PCG). • Completed by the nominated Project Control Group (PCG) based on information available at the <u>high level concept stage</u> of the proposed capital works project. • Submitted by the Beneficial User (Applicant) to the Discernment Partner (as applicable), and once endorsed, it is then forwarded to Synod Property Services for consideration by the Property Board. 	
APPLICATION SUMMARY	
Project Name	<input type="text"/>
Synod Reference No.*	<input type="text"/>
Applicant	<input type="text"/>
Joint Applicant (if applicable)	<input type="text"/>
Discernment Partner/s	<input type="text"/>
Type of work: <small>(Please indicate)</small>	<input type="checkbox"/> New Development <input type="checkbox"/> Renovation <input type="checkbox"/> Renovation and New Development
Project Location	<input type="text"/>
Anticipated Total Cost	\$ <input type="text"/>
<small>* Synod Reference No. – This was allocated when Form 1 was lodged with Property Services</small>	
Please indicate whether the following documents have been attached.	
<input type="checkbox"/>	High Level Concept Scheme (Refer Qn 11)
<input type="checkbox"/>	Quantity Surveyor (QS) Indication Report (Refer Section D)
<input type="checkbox"/>	Project Program / GANTT Chart (Refer Section E)
<input type="checkbox"/>	Government Funding Support Letters (Refer Qn 17G)
<input type="checkbox"/>	Project Partner Support Letters (Refer Qn 19)
<input type="checkbox"/>	Projected Cash Flow Statements for the next 5 years (Refer Qn 22)

Phase 3 Application for approval for full project plan

Phase 3 involves completion of Form 3I - Application for approval of full project plan.

The form should be done when the concept has been finalised and detailed information is available.

Requirements include:

- Brief/Objectives of Proposal
- Concept Plans
- Quantity Surveyor Report (Cost Plan B)
- Cash Flow Forecast (up to 5 years)
- Funding Confirmation
- Total Program of Project (timelines and milestones)
- Total Project Costs (construction, project management, contingency)
- Risk Schedule
- Interdependency (i.e. Government Funding, PSP)

As outlined above, all forms are to be submitted to PART (Property Application Review Team) for approval.

PART meet every Thursday on a fortnightly basis, and forms should be submitted one clear week prior to the next meeting or will be deferred to the following fortnight's agenda.

The PART meeting calendar for the forthcoming year has been sent to all parties however can be re-sent if requested.



Property Services (PS)	3I
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APPLICATION FOR APPROVAL OF FULL PROJECT PLAN

Filling in this form is the next step in the process for a building works project, which is complex and/or the cost of works is more than \$1 million.

This form is to be:

- Completed after Form 1 "Getting Started", Form 2A "Discerning and Deciding", Form 2B "Project Business Case" and the establishment of a Project Control Group (PCG).
- Completed by the nominated Project Control Group (PCG) based on information available at the completion of the Concept for the proposed capital works project.
- Submitted by the Beneficial User (Applicant) to the Discernment Partner (as applicable), and once endorsed, it is then forwarded to Synod Property Services for consideration by the Property Board.

APPLICATION SUMMARY

Project Name	
Synod Reference No.	
Applicant	
Joint Applicant <small>(if applicable)</small>	
Discernment Partner/s	
Type of work: <small>(Please indicate)</small>	<input type="checkbox"/> New Development <input type="checkbox"/> Renovation <input type="checkbox"/> Renovation and New Development
Project Location	
Anticipated Total Cost <small>(Including GST)</small>	\$

Please indicate whether the following documents have been attached.

<input type="checkbox"/> Full Concept Plans (Refer Qn 11)	
<input type="checkbox"/> Full Quantity Surveyor Report (Cost Plan B) (Refer Section E)	
<input type="checkbox"/> Detailed Project Program / GANTT Chart (Refer Section F)	
<input type="checkbox"/> Financial Statements for the last 3 years (Refer Qn 24)	
<input type="checkbox"/> Government Approval of Funding Letters (Refer Qn 26G)	
<input type="checkbox"/> Project Partners Letters Confirming Support (Refer Qn 28)	
<input type="checkbox"/> Projected Cash Flow Statements for the next 5 years (Refer Qn 31)	
<input type="checkbox"/> Risk Management Plan (Refer Section J)	

Form 3I - Application for Approval of Full Project Plan

4 of 16

February 2013

Phase 4-10 Project Implementation Process

Project Implementation is divided into 7 sequential stages, being Phases 4 – 10.

The Project Control Group is responsible for managing the project through the Project Implementation Phases (PIP) until completion.

The Project Manager of the PCG will use a number of established pro forma templates to keep track of the project and to prepare reports of its progress.

The PCG is required to meet monthly and the Development Projects manager must provide quarterly reports to the Property Board to advise the progress of the project. Both reports track finance, key dates and identified risks.

See Appendix A for a template of a PCG report.

The monthly and quarterly reports include a number of templates to track finance, program dates and milestones, and identified risks.

The financial summary document provides a breakdown of the four major cost areas within the project:

1. Consultants
2. Construction
3. Fixtures, Fittings & Equipment
4. Miscellaneous

The document also provides an outline of project funding.

Development Management

The Property Services team provides Development Management assistance and advice to Church Congregations, Agencies and Institutions. This service includes sitting side by side with church entities from the initiation phase of development projects through the delivery phase until completion.

The Property Services team reviews the opportunities of the subject properties and identifies development options with a focus on delivering mission objectives and financial sustainability's of the Beneficial User of the site.

More specifically, this includes:

- Reviewing asset and investment strategies (including investigating development opportunities)
- Identifying viable development options that are in line with mission requirements
- Highlighting risks and returns associated with the options presented
- Providing the tools to make informed decisions about the future of their property assets
- Financial assessments and feasibility analysis for alternative options (incl. concepts market analysis, development brief compilation, cash flows, and funding)
- Coordinating internal UCA approval process
- Managing the development delivery process including sales, planning permits, project design/documentation, funding, construction, authority's liaison and handover.

Risk Management Register

The Risk Management Register provides a framework for identified risks to the project, strategies to mitigate the risks, along with the potential consequences of the risk being realised. It uses a traffic light system to identify the scale of the risk.

Consultant Advice

Property Services has a list of pre-qualified consultants in various disciplines. The consultants have agreed to execute the standard UCA agreements and have complied with all insurance requirements and thresholds.

Any enquiries relating to contacting these consultants should be directed to Property Services who will provide details as the consultant who would be appropriate for the type of work the project requires.

OH&S

As part of our OH&S Policy, the Uniting Church requires that all contractors working on or at our facilities undertake an Online Health & Safety Induction Training Course and read and sign the contractor and tradesman handbook prior to entering UCA facilities or commencing work.

Please arrange for ALL relevant staff/workers to undertake the induction & read and sign the handbook prior to their next visit.

Click to access the Contractor Online Induction Course.

Click to access & print the Contractor and Tradesperson Handbook.

Heritage property

Certain buildings and land owned by the UCA are subject to a heritage overlay, which can include simple changes to a building's façade through to the subdivision of land. If a property contains a heritage overlay you can view the relevant details on your local council's website.

In addition to heritage overlays, properties may be listed in the Victorian Heritage Register, which is maintained by the Department of Transport, Planning and Local Infrastructure.

Useful websites:

Heritage Victoria

heritage.vic.gov.au

Heritage Council of Victoria

vhd.heritagecouncil.vic.gov.au

Property and Finance applications Top 15 must haves

We encourage the submission of a Form I to the Presbytery Property Committee whenever congregation have an idea/considering a new project.

Applications	Must Haves
Form 2B Business Case, Form 3I Full Project Plan	1. Not to be submitted without prior discussion with Property Services Development Manager/Project Manager
Form 3A App for PSP	2. Corresponding 3H Build form or at least quotes attached 3. PSP applied for amount should match exc. GST cost of project being applied for (inc. contingency)
Form 3C DAF or Emergency Grant	4. Corresponding 3H Build form or at least quotes attached 5. If applying for DAF, all disability access parts of quote are itemised
Form 3D IOMF	6. Supporting financial information, including most recent financial statements and budget/cash flow for the proposed program/purpose for the nominated term (3-5y)
Form 3ER or 3EC Application to Lease	7. Real Estate Agent market rent appraisal 8. If renewal or option to exercise, attach copy of current lease (this confirms commencement dates) 9. If Assignment, attach copy of current lease
Form 3F Application to Sell	10. Real Estate Agent sales appraisal
Form 3G Application to Purchase	11. Purchase is fully funded with banked funds or PSP
Form 3H Application to Build	12. Copies of quotes 13. If a building permit is required, permit has been obtained. Any questions talk to Property Services Project Managers Kim Quach (0429 066 195) 14. Project is fully funded with banked funds or PSP 15. If corresponding 3A PSP form, PSP applied for amount should match exc. GST total cost of project (inc. contingency)

Contractor & Consultants

Online Safety Management Platform

The UCA is committed to maintaining a safe workplace through the introduction of an Online Contractor & Consultant Induction platform called Linksafe.

This platform will provide a robust way to deal with compliance, creating a safer environment for Uniting Church employees, volunteers, contractors, congregation members and visitors and will reduce the administration for local projects as contractors and consultants will be “pre-qualified” with the church.

The key changes are:

- Contractors and Consultants must be pre-qualified as preferred suppliers to the Church.
- Each person who is employed by the Contractor or Consultant will receive their Induction via their employer.
- The Induction manages risk, so far as is reasonably practicable, to ensure that Contractors and Consultants are responsible for their health and safety.

This online induction does not apply to major projects where the principal contractor is in control of the entire site as the OH&S commitments are made through the major works building contract.

All Contractors or Consultants have to be pre-qualified and inducted into the Linksafe system prior to starting work at any Church property.

To prepare for the Online Safety Induction, all persons must have their Working with Children Check (Victoria), industry or professional registration and/or licences and insurance. These must remain valid on check-in at Church property in order to proceed.

The guidance material has been prepared to provide information on both Uniting Church and Contractor/ Consultant obligations. The related documents are available to congregations upon request or can be found on the Synod website.

Good contract management ensures both parties meet their respective obligations as efficiently and effectively as possible.

F Grants & Loans

Annual Capital Works Grants

Each year, grants are offered to assist mission-focused building projects and are available for two years beginning the January after approval. Funds are drawn down as required to either pay the service provider directly or reimburse the UCA entity.

The grants are funded from three sources:

1. Capital Works Fund
2. Heritage Buildings Fund (Victoria and Tasmania)
3. Early Childhood Building Maintenance Relief Fund.

This program is applicable to congregations, parish missions and presbyteries.

Application forms and the accompanying Mission Proposal Supporting Document are available each April. Completed applications are submitted via presbytery as appropriate to the Grants Coordinator in July.

The proposals are considered by the relevant Committee in August and September, and applicants will be advised of the outcome in October before the grant takes effect the following January.

For congregations and parish missions, please note applications must be reviewed and endorsed by the relevant presbytery before submission. It is recommended applicants work closely with their presbytery from the early stages of the application so it has a comprehensive understanding of the proposal. Presbyteries generally require applications be submitted in June to allow sufficient time for endorsement.

We also recommended applicants work closely with Synod Property Services when developing the project scope and costings before applying. All projects require separate approval of the details of the building project by the Property and Operations Committee or its delegated authority.

Successful applicants must provide annual program evaluations to keep us abreast of the progress. This helps us gauge the program's continuing viability and apply any learnings to future grant programs. It also assists those managing compliance for a number of funding sources.

All approved programs are carefully matched to funding sources according to specific parameters so it is imperative the grant adheres to the approved purpose and criteria.

Emergency Grant – Capital Works Fund

Congregations may apply for up to \$10,000 to assist with urgent repairs or works that are not covered by insurance and the congregation is unable to fund fully itself. The application requires the congregation to demonstrate the need for the works and to provide information as to its financial position. Please note any building works will also require the separate approval of the building scope and costing.

Emergency Grant – Sustentation Fund

Congregations may apply for up to \$10,000 to assist with the cost of stipend for a minister in placement, which the congregation is unable to cover themselves. This grant is to allow time for a presbytery consultation of Life and Witness of the congregation to determine its future and also ensure the minister is paid during this period. The application requires the congregation to provide information regarding its financial position and a cash flow for the period the grant is to cover. Successful grants will be paid in monthly installments.

Grant from Disability Access Fund

Congregations may apply for a grant to contribute up to 50 per cent of the cost of disability access works, such as accessible toilets and ramps, up to a maximum amount of \$50,000. The application requires the congregation to provide details of the scope and cost of works, plus information detailing how the remainder of the project will be funded. All proposed works are to comply with the Australian Standard (AS 1428.1) for disability access. Please note any building works will also require the separate approval of the building scope and costing.

Access to a Loan

Congregations may apply for a loan to assist with the cost of a capital project. This requires the congregation to demonstrate its financial capacity to support the loan for the duration of the lending.

DDA Compliance & Access Standards

The Disability Discrimination Act is governed by the Human Rights Commission, and regulates compliance by public spaces, buildings and structures in relation to accessibility by people with physical disabilities.

The Disability Discrimination Act provides protection for everyone in Australia against discrimination based on disability” (humanrights.gov.au).

When no construction work is being carried out to an existing church building there is no need to upgrade the building to comply with disability access requirements under NCC standards.

Alterations to an existing church building, though, may need a building permit to comply with the National Construction Code disability access provisions. If your church building is undergoing alterations a building certifier, architect, local council and/ or church head office should be able to advise on whether there is a need to comply with disability access requirements under current building codes and standards.

The Premises Standards detail the following categories:

- Continuous accessible path of travel
- Carparks
- Stairways along footpaths
- Controls
- Approaches, entrances and doorways
- Streetscape
- Public outdoor areas
- Fixtures, fittings and furniture
- Discrimination arising from management and maintenance practices
- Discrimination by staff
- Use of chemicals and materials

G. Manse Provisions

The offer of appropriate accommodation, either UCA property or leased, is part of the remuneration provisions for all ministers in placement.

Payment of a manse allowance only applies where a minister chooses to provide their own accommodation rather than the accommodation offered as part of the terms of placement.

Manse provided by Placement

The congregation shall offer:

Either

- (a) A Manse which meets Synod guidelines and has been inspected and approved by the Presbytery; or
- (b) Other accommodation which is considered appropriate by the minister, placement and the Presbytery. This may be a leased property.

The minister may choose not to accept the accommodation offered by the placement. In this case the Synod Housing allowance will normally be paid. However, in the circumstances when a Manse is offered and declined, and commercial rental of the Manse concerned does not generate sufficient funds to enable the payment of the Housing Allowance and standard maintenance costs for the Manse, the Presbytery shall take responsibility for negotiating an appropriate allowance. The Minister shall not be directly involved in these negotiations.

The Terms of Placement, including any negotiated allowances, shall be agreed prior to a call being issued. The Terms of Placement form shall be signed by the placement and the presbytery and included with the letter of Call. Upon accepting a Call the minister shall also sign the Terms of Placement form and return it to the placement along with the letter accepting the Call. A copy is to be sent to the Secretary of the Placements Committee.

Any change to the Terms of Placement (other than adjustments made by the Synod) requires the approval of presbytery. Any request to change the housing provisions in the Terms of Placement will be made to the presbytery which shall negotiate amended arrangements and the timing thereof and report it to the Placements Committee.

Rented Accommodation

Where a property is rented the placement will meet all rental costs including the bond. Any leased property must be available for a reasonable period, so that the minister and family are not disrupted with

continual moves. Where a move is necessary, the placement will meet the removal costs.

Care and Maintenance of Manse or Rented Accommodation

The congregation (or, in the case of rented accommodation, the landlord) is responsible for capital maintenance and all repairs and replacements relating to improvements, fair wear and tear, and general depreciation. Church Councils should also make annual inspections of the manse. (The Presbytery should also undertake an inspection every five years or when a new placement is to occur, whichever is the earlier.) Ministers should encourage regular inspections of the accommodation provided.

A minister, in accepting a call, accepts responsibility to keep the property in a state of cleanliness and ongoing general maintenance, as would apply if it were a rental situation e.g. gardens tended and lawns mown, windows clean, spouting and down pipes cleared, and appliances such as smoke alarms kept clean and functional. The occupants are responsible for costs incurred for unreasonable wear and tear or damage, including wear caused by family pets and may be responsible for paying any shortfall in bond return in rental situations if the shortfall relates to their actions.

Manse/housing costs

House insurance and rates

Whether accommodation is Church owned or rented by the congregation the minister does not meet the cost of the insurance of the property or normal local government rates, both general and waste service charges. The minister is responsible for manse contents insurance excluding property belonging to the placement (e.g. floor coverings and drapes). However, where the minister has a study/office on the church site, it is appropriate for the congregation to accept responsibility for insurance of the minister's personal on-site office contents under the church's policy. Note that there is a standard excess under the Synod policy.

Electricity, gas and fuel

All electricity, gas and fuel usage and service charges are, as a general principle, part of normal living costs and the responsibility of the minister. These expenses can be paid from a Minister's Benefit Account. Some congregations meet these costs, either wholly or, for instance, where a study is home based, contribute to the home gas and electricity accounts. This is a matter for local decision, and should be recorded in the Terms of Placement.

Water and sewerage

All manse water and sewerage usage and service charges continue to be the responsibility of the congregation, a common long standing practice across the Synod, including in country areas.

Guidelines for Manses

Revised 2001

The Uniting Church in Australia, Synod of Victoria and Tasmania, Property Board

The Design, Equipping and Furnishing of Manses

Foreward

In planning the construction or purchase of a new manse, it is essential that serious consideration be given to a number of fundamentals affecting the construction, design, layout and equipping of the building. This document seeks to give guidance in assessing these fundamentals in order to provide the basic and minimum requirements necessary for an acceptable standard of accommodation.

The standards mentioned herein are not intended to be absolute or restrictive. Where dimensions are quoted as “minimum”, they are subject to discretionary variations to suit special cases, particularly those involving purchase of existing dwellings. However it is expected that no particular dwelling should be considered suitable unless a very large percentage of the specified basic requirements and dimensions are complied with. The standards themselves are intended to be updated periodically.

Although this document has been prepared primarily to assist parishes, the criteria which it contains should be considered applicable also to Synod staff residences.

Congregations should consult with the Property Board at the preliminary stages of design, or when planning to purchase or alter a manse.

1. Planning Guidelines

Introduction

The manse is different from a normal house and must be capable of performing the dual functions:

1. of accommodating for the normal needs of an average family; and,
2. providing for the administrative and pastoral needs of the minister.

Function

In providing this dual function, care must be taken to protect the privacy of both the minister’s family and that of the visitor to the minister. This principle can be obtained by providing the study with either:

1. its own clearly marked direct external entry or,
2. access through the main entry in a way that is separated from the family.

Ideally the entry from the street needs to be visually distinct from the entrance used by the family.

Whilst study privacy is important, the need for its occupant to be able to oversee the family at times, especially young families, should not be overlooked.

Manse Family

Manse families will vary in size. It is important that the home be sufficient in size to accommodate large families and be adaptable to the varying needs of successive occupants, including the need to provide hospitality for visitors and emergency accommodation.

Location

A manse should be situated in a location convenient to the Church complex. If it is adjacent, there is the danger the minister and their family may be placed in the position of custodians or caretakers of the property. In which case a sensitive arrangement needs to be made to protect the privacy and freedom of the manse family.

A site chosen away from the Church complex should be within easy walking distance of the Church and where possible, convenient to shops, schools, public transport, and other services.

Services

It should be capable of simple connection to all essential services, water supply, power, and sewerage, or where these are not be available, economical alternatives should be made available.

Site

In planning the site, the positioning of the house, the shape of the garden and surrounds all need to be designed and taken as an interacting whole. Site analysis needs to consider the direction of the sun, the prevailing winds and the view. Privacy considerations need to be considered as well as problems associated with overshadowing adjoining buildings or trees. The siting of the building needs to take into consideration passive solar efficiency. This will provide better quality of life and long term economics for manse families. (Further information on passive solar principles can be obtained from the Property Services Team).

It needs to be well drained and checked with the local authorities for any known disabilities, such as unstable foundations, susceptibility to flooding, contamination, etc.

Aspect

To ensure maximum comfort and conditions, manses should be planned (or chosen) with major rooms orientated to the north to take advantage of winter sun and to preclude excessive summer sun penetration. In such cases it may be advantageous to have the frontage facing west, so that the garage/car entry may act as a protection from cold westerly winds.

The passive solar principles including effective cross ventilation need to be considered.

Materials

Materials of construction should be chosen as far as possible, to ensure thermal efficiency. This may be obtained either through lightweight framing with adequate insulation, or heavy masonry with high thermal mass. Significant economies are possible when consideration is given to how the sun is made use of in winter and shaded in summer.

Thought needs to be given to how finishing costs can be reduced and maintenance minimised in the long term.

Universal Access

All entrances and doorways need to provide for the possibility of wheelchairs, pram/strollers, including appropriately positioned handrails, especially in bathrooms and entrances. This is for the benefit of both members of the manse family and visitors. It is to be noted that universal access not only focuses on people with permanent disabilities, but also applies to people who are suffering temporary disabilities, such as ankle, leg, arm or back injuries. Older people

who have no obvious disability, but who are unsteady on their feet need also to be considered. It is wise to consider universal standards at the planning stage. Many standard fitments, such as doors, already meet such standards and hence do not increase costs. Consideration needs to be given to how all weather access can be obtained between the car and the house.

2. Basic Accommodation Requirements

The following spaces and areas are considered the desirable minimum basic requirements for manses. This applies whether the homes are to be designed and constructed or purchased and adapted.

Main Entry

Should be weatherproofed. See the notes on Function above for details regarding distinctive entrances. All entrances need to minimise steps and provide appropriate handrails for universal access, including wheelchair access. Letterbox and street numbers need to be clearly visible.

Study

Preferably not less than 14 sq. m

Fitted with bookshelves not less than 20 linear metres, preferably adjustable in height.

The study needs to be accessed from the hall or passage and where possible, direct access to entry. Consideration could be given for a waiting area in the hallway or lounge, to ensure a degree of privacy for the family and visitors to the study. This may require another entry/exit to the study.

It needs to be sound proofed including the ceiling and provide acoustic and visual privacy for the family and visitors.

Ready access to the lounge as a venue for larger meetings.

The telephone needs an extension to the main part of the house. An additional line may be advisable to cater for fax and e-mail.

Desk or bench space needs to be large enough for a computer, telephone (including sufficient power outlets) and writing area. Sufficient space needs to be given for a four-drawer filing cabinet.

The study may be used for small meetings, so additional chair space needs to be available.

Provide for instant warmth.

Natural lighting a must.

Additional Toilet Facility for the Study

W.C. & small basin in separate compartment.

Ideally one toilet to be readily available from entry and/or study for visitors without invading the privacy of the family.

Lounge Room/Dining Room

Preferably not less than 20 sq.m measured clear of space for dining.

Conveniently located relative to front entry, dining and kitchen areas. Access to an outdoor living area is favoured.

20 sq.m is an absolute minimum, providing adequate space for large families and the occasional meeting area. Aspect should be north or north east, at the western end of the building, but avoiding west facing windows, unless extra expense for shading is contemplated.

Dining Room

An area not less than 10 sq. m. This is optional and maybe an extension of the Lounge Room. Direct access should be provided to the kitchen.

Planning should ensure that the required number of people can be seated, with adequate room for movement behind the diners. Realistic storage space will also be needed.

Dining rooms normally face north, though they may be regarded as essentially night living areas.

Family Room

Not less than 15 sq. m.

With access to the garden or private outdoor area and direct access to kitchen. Aspect to north to get maximum winter sun. It may benefit from access to a southerly shade area in hot summer. This may offer cross ventilation if it occupies the whole width of the house.

It may need to be larger, if it is also to accommodate through traffic. Avoid having too many doors opening on to the space as this will limit the placement of furniture.

Kitchen

Preferably not less than 10 sq. m.

Ample built-in bench cupboards with laminated plastic or similar top surfaces and splashbacks with stainless steel sink (preferably double bowl). Sufficient overhead cupboards and preferably a pantry type food storage cupboard. Sufficient space to accept a refrigerator, deep freeze (could be in the laundry), dishwasher and microwave. Stove to be provided. (ref.3.3) Hygienic provision for the handling of recycling and disposal of garbage.

The room should not be an extension of living and dining areas; but may open to family room. It should not face west, unless effectively screened.

It should be well ventilated. An exhaust fan, with effective fly proofing should be provided, preferably above the stove area.

Good lighting below cupboards is essential over benches and stoves. Fluorescent fittings are recommended. Plenty of power points, at least two double outlets for each run of bench.

It is recommended that taps be of the ceramic disc type, either lever operated mixers or quarter turn taps.

Where garbage, compost material and recycling are stored in a cupboard, it needs ventilation.

Ready access should be provided to laundry area and to alternative entry.

It is advised that kitchen colour patterns be neutral, with repaintable surfaces.

Main Bedroom

Preferably not less than 14 sq. m inclusive of built-in robes or areas for same.

Built-in robes to be provided not less than 2m. long x 600 mm. deep.

The bedroom to be capable of accommodating one king/queen size or two single beds and a dressing table. In the case of single beds, there needs to be sufficient space for them to be placed centrally with access on both sides.

Conveniently located relative to bathroom and toilet facilities, or adjoining bathroom (ensuite).

Preferably at the eastern end of the building for a north facing building. A western aspect should be avoided, but if unavoidable, planting of appropriate trees and shrubs needs to be considered. Sun blinds are costly and expensive to maintain.

There may be a conflict when the front of the house faces east. Bedrooms should not be at the front for privacy reasons. However, creative design should be able to solve the dilemma.

Second & Two other Bedrooms

Second bedroom preferably not less than 14 sq..

Other bedrooms

preferably not less than 11 sq. m. .

Areas stated inclusive of built-in robes or area for same. Preferably they need to be at the eastern end of the house to obtain morning sun and avoid late afternoon sun in the summer.

Each room needs to be capable of accommodating two single beds, built in robes, a chest of drawers

and a study table or bench.

Conveniently located relative to main bedroom and to bathroom and toilet facilities. If possible avoid using the family room as the means of access to toilet/bathroom.

Remember that these may also be guest rooms.

Main Bathroom and Toilet

Separate compartments for bath/basin, Toilet, Shower. Sufficient in size to contain full size bath, shower facilities (at least over bath, but preferably as a separate room), and a wash basin. Storage cabinet, mirror and power outlet. Towel rails min. 3 metres total length.

Bathroom to take a full sized bath with basin, (preferably vanity type) storage cabinet, mirror and power outlet. A shower over the bath is an added advantage where there is a large family. Shower compartments to be fitted with a suitable glass screen door.

Toilet to have windows or louvres to give a free flow of air. Floors to be covered with impervious material (preferable ceramic tiles), and walls to a height of 1.8 metres. Walls around bath at least 450 mm and behind basin 300 mm to be lined with similar materials.

These compartments to be in close proximity to the bedrooms.

It is recommended that taps be of ceramic disc mixture types, especially helpful for people with restricted movement.

Bathrooms and toilets require strategically placed hand rails to cater for people with disabilities.

Exhaust fans are needed in toilet and bathroom and maybe some form of heating.

Laundry Facilities

Sufficient size to take washing machine and dryer, single trough, and if possible, ironing space and storage cupboard.

Storage Facilities

Provide for coats, linen cupboard, brooms and storage for bulk items such as suitcases, sewing machines, vacuum cleaners, floor polishers, etc.

Car Accommodation

Provide garage/carport with covered space to take at least one car but preferably two.

Highly desirable for access under cover between house and garage. Single garage and single carport have proved satisfactory.

Provide workbench and power outlet in enclosed area.

It is advisable to soundproof the house from the garage area.

Security doors (roller or tilt doors) are recommended for the car parking area. Similar security is required at the rear as well.

Consideration needs to be given for a secure access/storage of a caravan and/or trailer of average size on the property. This can be achieved through a drive through carport.

Storage Shed

Provide lock-up shed. This could be associated with the garage, provided it is secure.

To take mower, barrow, garden tools, etc. and needs a power outlet.

Outdoor Living

Where possible, outdoor living areas should be planned as an integral part of the design concept, with ready access provided from indoors. The effectiveness of the outdoor areas should be extended by providing roofed areas and privacy screens as far as possible. Areas should be sited in sheltered locations favourably oriented to summer shade and winter sun.

This can be achieved by the discreet use of trees and shrubs, making use of trees to allow for winter sun.

Verandahs and patios can be used to advantage as extensions of lounge and dining room areas.

Adequate fencing to protect children is necessary, especially where there are swimming pools.

Some weatherproofed external power outlets are useful.

Water Service

Water service to be extended to standpipes for connection to taps for hose in front garden, rear of house, garage/carport and rear garden where required.

Taps in remote areas away from house.

The positioning of taps needs to consider a combination drip/fixed sprinkler system using a timer.

In some areas a supplementary water tank taking water from the roof would be useful.

3. Basic Equipment Requirements

The following items of equipment are the minimum requirements for manses. All equipment shall be maintained in good operating condition. Note: Solar power options.

Hot Water System

A Solar powered system with a booster should be the first consideration. Gas, electric, slow-combustion should be considered only if there are valid reasons. Systems to be mains pressure if at all possible and connected to kitchen, bathroom and laundry (including washing machine).

Consideration needs to be given to purchasing systems that last a long time and which are suitable to the type of water in the area, so as to avoid corrosion.

The system needs to be of sufficient size to accommodate six people.

The positioning of the system is important to avoid wasting water and power. Some engineering advice may be necessary, if the distance between the system and outlets is too long. For instance it may be possible to arrange the hot water line in a continuous loop.

Stove

For safety and access, wall ovens are preferred with separate provision for grilling at a reasonable level.

Telephone

A telephone outlet and handset located in an appropriate position in the study. A parallel outlet and additional handset located in a position convenient for family use, such as the kitchen, with a further outlet and handset in the main bedroom.

At least two, maybe three phone lines are needed to cater for phone and internet.

Some manses have separate private and church lines.

IT and Computer Facilities

In the age of IT, consideration needs to be given to wiring the house with coaxial cables, so computers can be networked between the study and children's bedrooms.

Clothes Drying

Rotary clothes hoist or foldaway drying lines built into external area suitable for clothes drying.

Television Antenna

Antenna installation sufficient to provide good quality reception, with outlets in appropriate locations.

Additional outlets for FM radio would be desirable in living areas. Wiring should be coaxial and properly installed.

Cooling Systems

Provision of a cooling system should be determined on the basis of what is generally accepted in the community. However, some consideration needs to be given to the fact that the manse, and in particular the study, is a workplace. Nevertheless air conditioning or cooling systems need to be considered only where it is absolutely necessary and where finance permits.

Ceiling fans are more environmentally friendly and should be considered before more expensive systems are considered. Well designed manses will limit the need for cooling systems.

When an air conditioning system is absolutely necessary, roof mounted/ducted evaporative cooling systems are effective, subject to an adequate water supply. Portable air conditioners are not suitable in areas of high humidity, such as near the coast, but are good inland.

Heating

Provision for heating in lounge, family room and study. Ducted heating should be seriously considered if finance permits. Ducted heating is more cost effective than the use of several small units. It also provides quick heat and diverse temperatures for different parts of the house.

(If it is intended to add refrigerated cooling, then ducts need to be adjusted.)

Given the problems that can arise with gas/electricity supplies, consideration needs to be given to making sure a variety of energy sources are used in the manse.

Ventilation

Exhaust fans are needed for kitchen (over the range), shower, and bathroom. One maybe necessary in the laundry for the tumble dryer.

All fans must have external outlets. Never discharge into roof space.

Insulation

Provision for wall and ceiling insulation is essential. 75 mm batts in the ceiling.

Reflective insulation is needed in walls below the roofing material.

Pelmets over the curtains are recommended to stop convection currents and loss of heat in winter.

Waste Disposal

Provide adequate space for rubbish bin, recycling bins and compost.

Fire Prevention

Building regulations require smoke detectors. A fire extinguisher and fire blanket should be provided in the kitchen.

Security

Manse families have special security needs, especially when the manse adjoins the church. Sometimes the minister's family is at risk from the public, when the manse is isolated from other residential properties.

Steel security doors with one way mesh and dead locks are recommended on all entrances.

Security lighting, possibly motion sensor lights are recommended at all entrances.

Depending on the location, a security system needs to be installed.

4. Basic Furnishings

In all manses the following basic furnishings shall be provided.

Floor Coverings

All floor surfaces are to be provided with appropriate floor coverings. Timber floors not otherwise covered shall be fine sanded, sealed and polished.

All floor coverings are to be provided in neutral toning to harmonise with varying personal furniture and furnishings.

Floor coverings should be selected for durability and ease of maintenance.

Window Coverings

Good quality curtains shall be provided to windows and external glazed areas throughout.

Curtains shall be lined if necessary to protect the materials in exposed locations.

Light fittings & Power Outlets

Adequate lighting shall be provided throughout with ample double power outlets. Include provision for standard lamps.

External lighting is required for security (cf. 3:13), but is also useful for the garden area.

Safety power boards including surge and earth leakage protection are required.

Insect Screens

Insect screens should be provided throughout to windows and doors.

5. General Provisions

The following general items should be considered as necessary and basic.

Paintwork

Paintwork should be kept in sound condition. Painted surfaces should not be allowed to deteriorate to the stage where major remedial work is necessary to restore the finish.

Regular inspections should be undertaken to ensure this.

Paving

Concrete (or similar hard surface) paving, with a non-slip surface should be provided at least in the following locations: – carport/garage, car tracks and paths to clothes hoist as appropriate. Minimise steps to facilitate easy access.

Termites

Termites are a potential problem in all areas and are particularly encouraged by damp conditions. When building make all necessary provisions.

Residences bought second hand should be inspected for termite infestation prior to purchase and if possible a certificate should be obtained from a pest exterminator signifying that the premises are clear of activity, or alternatively indicating what eradication measures may be necessary. Eradication should be completed before contracts of sale are finalised.

Vermin Proofing

New and existing residences should be constructed or modified, if necessary, to ensure that roof spaces are effectively sealed against the entry of birds, possums or rats.

Insect Pests

Manses should be treated on a regular basis preferably by a professional pest control

service, to ensure long term protection against ants, cockroaches and other pests.

Drainage and Dampness

Where reactive clay soils exist ensure that the surface of the ground is graded away from the building and never allowed to form a dam in which water may be trapped for extended periods. Impervious paving should be carried around the perimeter for a width of 1 metre, with falls away from the walls. The joints at the wall need to be sealed. A spoon drain needs to be placed on the external edge of the paving and connected to the storm water.

Where normal permeable topsoil exists on a sloping site, water may be trapped under the surface. In which case this may require a system of agricultural drains. This will be especially necessary when the plan contains re-entrant angles. On these occasions expert advice will be needed.

Garden beds should not be built up against house walls, especially in clay conditions.

Watering of the garden can lead to movement in the clay and hence cracking in the walls may occur in dry periods. Certainly garden beds should never be built up above dampcourses.

Manse committees need to be alert to these issues on a continuous basis.

Garden and Grounds

Gardens need to be designed with low maintenance in mind. Appropriate fencing needs to be installed, both for privacy and security. Preferably the front garden needs to be fenced off from the driveway.

6. A Plan for Finance

An application to build, extend or renovate a manse needs to be submitted to the Property Applications Review Team via the Presbytery. This must be done on the appropriate application form available from the Property Board.

Applications need to include preliminary sketches and a plan of finance.

Early contact with the Property Services Team is recommended and this can be done direct. This allows the Property Services Team to get comments from advising architects before final sketch plans are initiated. It is expensive to make changes further down the line.

Note that project builder plans do not provide for the peculiar needs of manses. If used, remember modifications are not always possible, but if so they are generally expensive.

7. Regular Maintenance Inspection

It has been noted above that when building manses it is wise to keep in mind maintenance requirements and costs.

Inspections need to be done during the vacancy of ministry, with all adjustments and repairs completed before the new minister takes up residence. Such inspections are the responsibility of the Presbytery.

Ideally a congregation needs to plan for an annual manse inspection. Except for emergencies, this means that manse families are relieved of the need to initiate complaints, and allows the congregation to budget efficiently for maintenance.

Glossary

Asset Strategy Program (ASP)

assists congregations to lead into a new era by giving opportunities with Property Sales Proceeds (PSP). The ASP is one of the pathways to a missional use for property sales which gives congregations and the Presbytery a great vehicle to be able to implement various missional projects. A project group is formed to explore options, with representatives of the Congregation, Presbytery and Synod Property Services.

Property Sale Proceeds (PSP)

Congregations may access proceeds from the sale of church property to assist with a range of projects, including:

- Capital projects – including repair, refurbishment and redevelopment of existing property, plus buying new property.
- In certain circumstances, a congregation may access the capital for non-capital purposes. These include projects of high missional priority and, for small rural congregations, operational purposes to extend ministry in the region.
- Manse for Manse. The proceeds from the sale of a manse may be reserved for manse purposes, either to buy a new manse or to invest the funds and use the interest earned to assist with Manse Allowance payments to the minister in placement.
- Investment of proceeds into an Interest Only Mission Fund (IOMF), whereby the interest earned is distributed to support a specified and approved mission project.
- Investment of proceeds into a Money for Mission Fund (MFM) where by the interest earned is distributed twice a year to be used by both the responsible body and the wider church.

Here for Good (HFG)

Here for Good is a project begun in 2020 with a team of people representing Synod Ministry Operations and Presbyteries. Here For Good is all about finding alternative, financially sustainable ways of supporting the missional work of the Church for decades to come. Through the Synod, the Uniting Church has contributed financially to wider missional work, including from cash reserves. Those finite reserves have been reducing for many years with the initial impacts of COVID-19 increasing the urgency of finding sustainable funding solutions. Here for Good is about finding better, more financially sustainable ways to support the Church's missional work across Victoria and Tasmania well into the future.

IOMF (Interest Only Mission Fund)

The Interest Only Mission Fund was set up by the VicTas Synod to provide responsible bodies access to property sales proceeds for use in mission-related projects. When a property is sold a responsible body can indicate the mission-related projects that will be funded by the sales proceeds. They can then apply for access to the funds when needed.

Money for Mission (MFM)

Under the Money for Mission Program monies raised from the sale of properties excess to missional needs are paid into the Money for Mission Fund. This fund, administered by U Ethical, is a mix of U Ethical's Australian equities and enhanced cash investment products. Invested Net sales proceeds will generate returns greater than net rental income in the case of rental properties, or for other property sales, greater than the income that would be received by investing after sharing in an IOMF. There is also more flexibility with this income, as the Responsible Body decides how this is spent

- Income replacement for congregations/
- Responsible Bodies
- Presbytery funding
- Assembly

- Synod missional funding
- Wider Church missional grants
- Congress

This new approach will

- Provide a simple and hassle free income stream
- to Responsible Bodies/Congregations
- Allow Congregations/Responsible Bodies to
- use an income stream as they determine.
- Enable the potential for long-term capital
- growth

PART

PART (Property Application Review Team) is a sub-committee of the Property and Operations Committee, and it receives and processes applications for property and finance matters. The committee meets fortnightly and the membership is comprised of staff including the Synod Property Trust Secretary, Synod Legal Counsel, and representatives from the Property Services Unit and eLM.

PART provides a “one stop shop” for congregations on property and finance matters, and has delegated authority to make decisions within respective policies and authority limits. PART reports to the Property & Operations Committee regarding the decisions made, and refers any applications outside policy or authority level. Property matters include applications to lease, build, purchase, sell and develop. Finance matters include applications for a loan, grant (Disability Access Fund or Emergency), use of property sale proceeds, and establishment of an Interest Only Mission Fund (IOMF). Most recently PART also considers Money for Mission Fund applications.

PART also receives the mission discernment applications “Form 1 Getting Started” and “Form 2A – Presbytery Discernment”. The committee provides feedback as necessary, and ensures that the discernment process has occurred and is documented particularly for building projects, access to property sale proceeds and establishment of an IOMF (Interest Only Mission Fund).

Project Control Group (PCG)

The Property Services offers assistance with projects of all sizes and risk profiles. A project governance structure has been developed to assist church entities with significant and complex building projects that are expected to cost over \$1 million.

The Project Control Team is appointed by Synod Property Services and comprises members of the congregation and others as required to assist the professional Project Manager. The structure aims to alleviate the risks inherent in any major project or development, and draws upon the experience of the Property Services Team. The Project Control Group (PCG) is established once the project application process is approved with the endorsement/feedback from PART or Property Board (Property Board approval is also required if the project cost is greater than \$2million). The PCG is responsible for making the everyday project decisions.

The Project Control Group is responsible for managing the project through the Project Implementation Phases (PIP) until completion.

The Project Manager of the PCG will use a number of established pro forma templates to keep track of the project and to prepare reports of its progress.

Throughout the implementation of the project, the PCG is required to meet monthly and the Manager of Development Projects is required to provide reports on a quarterly basis to the Property Board to advise the progress of the project.

Property Oversight Group (POG)

A group set up by Presbytery to oversee a site with multiple stakeholders. This is usually put in place during the transition after a congregation closes or relocates.

Public open space contributions

When proposing to subdivide your land into 3 or more lots, you are required to make a contribution of 5% of the site value. This is used to create open spaces such as public parks, playgrounds and reserves.

Risk Management Register

provides a framework for identified risks to the project, strategies to mitigate the risks, along with the potential consequences of the risk being realised. It uses a traffic light system to identify the scale of the risk.

