



Dollars & Sense

February 2018 Newsletter from the UCSA Resources Team

UC Invest enters a new era

For over 40 years, through the patronage of congregations, Uniting Church members, family, friends and organisations associated with the church, UC Invest has generously supported the work of the wider church. In the past five years, UC Invest has given \$10m to the Mission and Service Fund and this year plans to give a further \$2.2m (20% of the Mission and Service Fund's annual income).

In 2016 the Australian Securities and Investments Commission (ASIC) forecasted changes to conditions provided to Religious Charitable Development Funds, which UC Invest had relied on. During 2017, the Uniting Church Investment Committee, together with the Resources Board and Standing Committee, determined to apply

for an Australian Financial Services Licence so that UC Invest could continue to serve its clients and generate income to support the work of the Church. It was further agreed that a new company, the Uniting Church SA Investment Fund (Ltd), would be established to hold the licence.

In January this year the Australian Financial Services Licence was granted. Over the next few weeks UC Invest's personal account holders will be contacted requesting that they transfer their investments to the Uniting Church SA Investment Fund. Personal account holders are urged to continue supporting the Church through their investments with UC Invest.

The ASIC changes do not impact congregations, so for accounts held by congregations it's 'business as usual'.

Attainment of an Australian Financial Service Licence is a significant achievement which will sustain and strengthen UC Invest. However, it is the ongoing patronage of the wider Uniting Church community, as we work together, that will ensure the future grants to the Mission and Service Fund.

As we look forward to the next 40 years please know that your continued support for UC Invest is giving to the life and mission of the church. Further details about UC Invest are available at ucinvest.com.au or call the UC Invest team on 1300 274 151.

Peter Battersby
Executive Officer, Resources

Property Services

The Property Services Team has undergone significant staffing changes over the last 12 months.

After some 16 ½ years, Lynne Aird (Property Administrator) concluded her role in July. Lynne had been responsible for facilitating the sale and purchase of property, residential and commercial leasing, license agreements, congregational applications, subdivisions, heritage, fencing matters and closing of buildings on behalf of the Property Trust. Lynne was thanked in many forums including an afternoon tea where many stories and anecdotes were shared. Although leaving the Synod office, Lynne is not leaving the Uniting Church; instead we wish her well as she transitions to a congregational ministry role.

Bron Minchin also concluded her contract role as Property Administration Assistant

earlier in the year. Bron had served in Property Services since May 2015. Bron ably assisted the team in many facets of administration, including coordinating the wind-down of the Motor Vehicle Lease Scheme.

In March, Trish Johnston commenced in the role of Property Coordinator. Trish has 20 years' experience in administration, much of which involved minor capital works and building projects. Trish is an active Uniting Church member and is involved in the coordination of a women's group, a member of the worship team and also volunteers for the Salvation Army serving the homeless.

In June Beverly Ong commenced in the role of Property Administration Assistant (0.4FTE). Beverly has over 10 years full-time work experience in administration, procurement, finance and IT across a range of industries.

Most recently Beverly has worked part-time in a real estate company which has given her exposure to aspects of property management.

Catherine Stock also continues to serve the church with excellence in her role as Senior Building and Projects Coordinator.

The Property Services Team looks forward to helping you and your congregation with any queries or plans you have for your church property.

Matt Wilson
Manager, Property & Projects

Safe-Tea Break

Welcome to the first instalment of 'Safe-Tea Break' for 2018 and my ongoing quest to try and demystify WHS. In this issue I'm focussing on 'lone working' as it's a risk that occurs regularly in the church, but can prove difficult to manage. The reason for its high frequency in the church is because we generally operate irregular hours of the week with limited numbers of staff or volunteers. Some examples of when this occurs would be:

- Opening, closing and preparing the church for a service or meeting
- Ministers are called away from their office leaving an administrator alone
- Delivering goods or services on behalf of the church
- Cleaning or carrying out routine maintenance or checks of the property.

Work on behalf of the congregation by contracted employees should be easier to manage; however, controlling what is undertaken and when by volunteers (especially those who are key holders) can be more challenging. We rely heavily on volunteers often working around their own busy schedules to keep the church running.

Although we're unlikely to be able to completely eradicate the risk altogether, we can take some sensible actions to reduce the risk to a reasonably practicable level. Good planning and creating a positive safe work culture are key to achieving safer lone work. The following points are some general principles that should help with managing this risk:

- Reduce the opportunity for unplanned lone work to a minimum. This could be as simple as organising regular maintenance on a preferred day or holding working bees to undertake higher risk or more complex maintenance activities.
- Remind people of the duties of care we owe to each other and in particular the duties owed by your church council. In some cases, church council members may be held vicariously liable for the actions of individuals; therefore confirm that the church council takes this duty seriously.

- Focus on undertaking an activity as safely as possible rather than just pointing out the negatives and safety issues. Involve those currently undertaking the activity and ask them for their suggestions on how it could be made safer.
- Limit the number of key holders to a minimum. If this has gotten out of hand in your congregation, consider having a key amnesty. Many key holders no longer need or even want their keys!
- Ensure you have a simple procedure if someone needs to be left alone unexpectedly. This could include ensuring entrance doors are locked and a door bell or telephone number is made available should someone need access.
- Try and ensure that anyone working alone at least has access to a telephone and suitable contact details of who to call if there is a problem. It's generally good practice to make sure that someone knows where they are and when they are due to finish. If necessary, have someone responsible for checking in on them - even a simple text message could help.
- In the event that there is a call out in the middle of the night, ensure that there is more than one person in attendance if the police or emergency services are not already on site to meet them. Avoid allowing people to act as impromptu security guards, no matter how well intentioned. For out-of-hours securing of property, please contact UCSA Insurance Services. Their service team contact details are available here: <http://sa.uca.org.au/insurance-services/service-team-contact-details>

Ultimately, undertaking work activities alone places us at greater risk and increases the possibility of incidents being made far worse due to a lack of timely response. Working together for the benefit of each other and those we serve is who we are as a church. I encourage you to take some time to consider if there is anyone in your congregation working on their own who may benefit from some support.

If you would like to discuss this or any other WHS related matters, I work Tuesday, Wednesday & Thursday at the Synod office and can be contacted on wbooth@sa.uca.org.au or by phone on 8236 4214.

Wayne Booth
WHS Coordinator

Insurance Services

Insurance Services

Well, to start off the year, thank you to all who have quickly paid for their insurance renewals. If any of you require a current certificate of currency for Public Liability insurance, please call or email us to arrange for a copy to be sent to you.

A few matters have been raised over the last couple of months involving volunteers. A question has been asked about 'loaning' volunteers of the church to other organisations, while keeping them insured under our insurance policy. As a general rule, we can't do this unless we apply and receive written consent from our insurers. Also, you may not be aware that our insurance premium is calculated on the basis of an estimated number of volunteers. If your circumstances change, and you are using more volunteers than usual please let us know as we need to advise our brokers.

Finally, here are some general matters we'd like to bring to your attention:

Now is also a good time to inspect properties to see if any maintenance issues need to be addressed. Blocked gutters and overhanging trees are just some things that should be checked.

If you are renting properties not owned by the church (for example for an op shop) you will also need to advise Insurance Services so we can make sure that you have appropriate insurance in place.

Again a reminder that if you are aware that a property has suffered damage from a storm or burglary, it is very important to advise us as soon as possible of the damage so we can attend to repairs quickly.

If you have any other questions about insurance, please contact me or Susanne Alley in Insurance Services on 08 8236 4222 or email us at insurance@sa.uca.org.au

Tony Phillips
Insurance Services

Human Resources and WHS: It's all about people...

Uniting Church SA values people and is committed to providing a safe, healthy and productive work environment. Human Resource practices can influence behaviour, attitudes and performance within the workplace.

Uniting Church SA Human Resources can provide Church Councils on behalf of their congregations with advice, resources, assistance and expertise from a first-tier enquiry basis through to more complex and specific human resource matters. This edition focuses on implications of changes to employees' terms and conditions of employment.



Church Councils in their mandate to enable congregations to fulfil their ministry and mission objectives, periodically undertake reviews of the resources the congregation will require. In some cases such reviews may involve changes to the terms and conditions of employment for paid staff. These changes are required to be made in accordance with the Fair Work Act 2009 and/or relevant award provisions, and take into account the sensitive nature of such matters and any potential conflict of interest. It is therefore strongly advised that when congregations are considering new ministry and mission

initiatives which may affect the current staffing employment terms and conditions, the Church Council Chairperson (or their delegate) consult with the Presbytery & Synod Human Resources team.

For further information please contact Presbytery & Synod Human Resources on: 82364234 or email humanresources@sa.uca.org.au



The three month property principle

If your congregation is planning a property related project, it is helpful for you to be aware of the timeframes involved. Most property planning and preparation processes that involve Synod generally occur over a 3 month period. Considered planning and preparation allows a smooth pathway towards decisions made by congregations with regard to the properties in their care. This article will explain the timeframes and some of the complexities when looking at property issues.

The 3 month period can involve the local congregation, governing bodies of the Uniting Church SA, Pastoral Relations & Mission Planning Team and Property Services. The majority of the Uniting Church properties were built in the 1800s, which raises unique issues when considering the care and progress of these properties. Although there are guidelines for each property scenario, in practice when considering the properties in our portfolio it has often been heard said around the office: "I've never seen that before!"

Outlined below are common hindrances we have identified which can delay or stop progress of works and/or property decisions beyond the expected timeframes. Avoiding these will make your property journey smoother and more enjoyable.

Sales/Purchasing

- Fully completed application forms are not received
- Lack of clarity on timing of sale/purchase
- Properties currently tenanted
- Sub-division of land required before progressing to sell
- Workmen's liens on titles required to be removed (i.e. a debt over the property)
- Unknown beneficial users
- No current asbestos register.

Commercial leasing/residential leasing/Licence agreements

- Unclear leasing arrangements
- Current leaseholders difficult to contact
- Leasing agent not identified
- Lack of clarity of licence agreement arrangements
- Cost of legal representatives
- Unclear historical arrangements (e.g. handshake deal with the neighbouring property owners)
- Change of property use.

Applications for sale proceeds

- Lack of clarity around the use of sale proceeds
- No supporting quotations for works or appropriate documentation accompanying applications
- Limited planning of property improvements (e.g. urgency of maintenance & funds required)
- Retrospective requests.

Renovations

- Not utilising early advice on policy and processes
- Mission Plan not fully formed
- Financial assumptions not accurately detailed
- Congregational uncertainty/indecision during the project
- Splitting large works into separate contracts
- Long term property planning is not detailed enough
- A local project coordination team is not appointed
- The use of unlicensed contractors
- Safety and compliance issues
- No current asbestos register

Maintenance

- Insufficient property maintenance over a number of years
- Lack of energy or funds to maintain property
- Safety and compliance issues going unaddressed
- Resolution of difficult issues without professional advice
- Shrinking & ageing congregation membership

There is a solution to any scenario. However, finding the right solution for the local congregations' context and property can take time. As your local congregation considers their property matters please consider the three month principle in your planning.

The best way hindrances to properties can be avoided or minimised is by early intervention. The Property Services team welcomes conversations around all aspects of property and can be contacted via

- property@sa.uca.org.au
- Sales/Purchasing, Sub-division, Commercial & Residential leasing, Licence agreements, Sale Proceeds, Trish Johnston (08) 8236 4210
- Renovations, Maintenance, Building matters, Historical data, Catherine Stock (08) 8236 4240

Matt Wilson
Manager, Property & Projects

Finance - General

Australian Charities and Not for Profit Commission (ACNC)

For those congregations whose financial year end is 30 June, this is a reminder that the 2017 Australian Charities and Not-for-profits Commission (ACNC) Annual Information Statement (AIS) should have been completed by 31 January 2018. Please ensure your congregation's AIS has been submitted to avoid the risk of penalties.

For those congregations whose financial year ends 31 December, the AIS is due by 30 June 2018.

A guide to completing the 2017 AIS is now available [Uniting Church SA - ACNC](#).

Audited 2016 Financial Statements

Thank you to those congregations, 'parishes' and faith communities who have submitted a copy of their audited 2016 financial statements to the Synod Financial Services Team. Although these were due by 30 June 2017 there are still a number yet to be sent in. Please assist in complying with regulation 3.8.7 by sending these in.

Your assistance is most appreciated. Queries: Peter Harbison (08) 8236 4282 Country Callers 1300 766 956.

Mission and Service Fund Contributions – 2018

As at the end of January 2018, 61% of congregations have provided a contribution response form.

Response forms for 2018 Mission and Service Fund contributions can be downloaded from Uniting Church SA website <http://sa.uca.org.au/mission-and-service-fund>

If you are yet to send in your congregation's form please complete and return it to the Synod Finance department. Your prompt attention to this is appreciated.

Should you have any questions about completing the form or payment methods please contact Peter Harbison on (08) 8236 4282 Country Callers 1300 766 956.

Payroll

Timing of advice to Payroll Bureau about termination of service

If your congregation's payroll is processed by the Payroll Bureau, and a paid staff member leaves their position or finishes a contract, it is vital that the Payroll Bureau is advised straight away.

This will ensure that individuals receive the correct final pay and that any unused annual leave is also taken into consideration.

A termination of service form can be found on the Payroll page of the UCSA website at [Uniting Church SA - Payroll Bureau Service](#)

Payroll Cut-Off Dates

Timesheets and any leave forms should be submitted to the Payroll Bureau as soon as possible at the end of each month and no later than **the 4th** of the following month (unless otherwise communicated). This will greatly assist Payroll in completing the pay cycle on time.

Timesheets & leave forms can be scanned & emailed to payroll@sa.uca.org.au or posted or faxed.

If you have any questions, please don't hesitate to contact Payroll by emailing PayrollUCA@sa.uca.org.au or phone 8236 4241 or 8236 4242.

Congregational Bookkeeping Unit (CBU):

Services Offered by CBU

The CBU offer a variety of services to congregations including:

- Bookkeeping Services
- General Bookkeeping Support
- Consultancy Services
- MYOB software - Installation and Training

Information about these is available on the UCSA website at [Uniting Church SA - Congregational Bookkeeping Unit](#) or email cbu@sa.uca.org.au with any enquiries.

CBU Workshops - 2018

The CBU run a number of free workshops on a variety of financial topics during the year. These are designed for Treasurers and those charged with financial duties and responsibilities in congregations.

Information on these and many other resources may be found on the CBU web page at [Uniting Church SA - Congregational Bookkeeping Unit \(CBU\)](#)

Diane Hughes
Manager Financial Services