

FINANCIAL ASSISTANCE POLICY

INTRODUCTION

The Diocesan Council of the Australian and New Zealand Diocese of the Russian Orthodox Church outside Russia ("the Diocese") is often asked to consider requests, both formal and informal, for financial assistance.

Requests for assistance are received from parishes, monasteries and communities, from missions and emerging communities, from individual members of the clergy, and in relation to activities and events in the life of the Diocese. Assistance may be provided from the Needy Parishes Fund, from the Mission Fund, from the Youth Fund, or from other Diocesan funds.

PURPOSE

This purpose of this policy is to

- provide guidance to the Diocesan Council in considering such requests
- ensure adequate control and governance
- set out procedures and timeframes for the consideration of requests

POLICY

The mission of the Diocese

All requests for financial assistance should be aligned with the mission of the Diocese:

The Australian and New Zealand Diocese of the Russian Orthodox Church outside Russia ("the Diocese") exists to care for and administer parishes and monasteries subject to the Synod of Bishops of the Russian Orthodox Church outside Russia in Australia and New Zealand.

It cares by founding parishes, monasteries, missions and communities, by consecrating churches, by assigning and guiding clergy, and by coordinating Orthodox Christian spiritual education and other soul-profiting activities.

It administers by reviewing the activities of the clergy and the administrators of parishes, monasteries, missions and communities, and by supervising the acquisition and management of church property.

The Diocese endeavours to serve all Orthodox Christians of Russian tradition in Australia and New Zealand, and - together with the representatives of other Local Orthodox Churches - to show forth the Orthodox Christian faith to the unenlightened in these lands.

The Diocese undertakes its work with regard to the Holy Canons, the statutes and regulations of the Russian Orthodox Church outside Russia, and the civil law of the countries, states and territories in which it undertakes its work.

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Support of the clergy a parish responsibility

It is understood that provision for the accommodation and living of the clergy is, properly speaking, a matter for the parishes and monasteries of the Diocese rather than of the Diocesan administration.

Diocesan assistance to parishes for the accommodation and living of clergymen coming to the Diocese from abroad will only be considered if the clergyman has been engaged in accordance with the relevant Diocesan policy.

Parishes, monasteries and communities

In order to receive any kind of financial assistance from the Diocese, parishes, monasteries and communities must, as a minimum:

- have provided full financial statements, all audited, for at least the past five years
- be paying Diocesan and Synodal levies unless formally exempt
- in Australia only - have explained any inconsistencies between the audited financial statements and the GST income and expenses reports
- in Australia only – be compliant with Australian Charities and Not-for-Profit Commission (ACNC) requirements
- have completed a comprehensive risk assessment and treatment plan and in Australia only, be compliant with the *Model Work Health and Safety Act*
- be governed according to the Normal Parish By-Laws or the Statutes for Monasteries of the Russian Orthodox Church outside Russia
- have the title deeds to parish property held by the Russian Orthodox Church (NSW) Property Trust or in some other way consistent with the ecclesiology and canonical norms of the Orthodox Church
- have had a regular presence at Diocesan and Pastoral Conferences
- show exactly what the assistance is to be used for
- commit to value for money, obtaining a minimum of three quotes for any goods or services
- undertake to provide full details of actual expenditure

These are not criteria for assistance but rather criteria for the consideration of any application.

Missions and emerging communities

A Diocesan mission is an organised community to show the truth of Orthodox Christianity to those outside the Church. They may include missions to the non-Orthodox in Australia, New Zealand and other parts of the world.

Having services in English and other vernacular languages do not define a mission. It is for parish rectors and monastery superiors to decide how best to minister to the flock entrusted to them. Some emerging communities of Orthodox Christians, sometimes Russian speaking,

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desire services in English, or other vernacular language. Within the Diocese, emerging communities are nascent groups who desire regular services or pastoral visits and who hope, in time, to form a regular parish of the Diocese. Recent examples of emerging communities in the Diocese are the communities in Gosford and Warrnambool.

In order to receive assistance, missions should:

- not be operating in opposition to other similar Orthodox Christian missions, whether of our Diocese or of another;
- be operating under the supervision of a responsible person well-known to the Diocesan administration, trusted, and committed to pursuing the interest of the Russian Orthodox Church outside Russia.

In addition, missions and emerging communities must:

- undertake to have a regular presence at Diocesan Conferences and, as appropriate, Pastoral Conferences
- undertake to respond to Diocesan collections and appeals for assistance
- provide a detailed mission or community plan that includes a budget
- in Australia only – be compliant with Australian Charities and Not-for-Profit Commission (ACNC) requirements
- have completed a comprehensive risk assessment and treatment plan and in Australia only, be compliant with the *Model Work Health and Safety Act*
- show exactly what the assistance is to be used for
- commit to value for money, obtaining a minimum of three quotes for any goods or services
- undertake to provide full details of actual expenditure

These are not criteria for assistance but rather criteria for consideration of any application.

Should details of actual expenditure not in due course be provided, no subsequent application for assistance will be considered.

Activities and events

In order to receive assistance, the organising committee of an event or activity must:

- provide a detailed event or activity plan that includes a budget and a comprehensive risk assessment and treatment plan
- show exactly what the assistance is to be used for
- commit to value for money, obtaining a minimum of three quotes for any goods or services
- undertake to provide full details of actual expenditure

These are not criteria for assistance but rather criteria for consideration of any application.

Should details of actual expenditure not in due course be provided, no subsequent application for assistance for that event or activity will be considered.

Individuals

Financial assistance will be given to individuals only in cases of severe financial hardship or on specified compassionate grounds, and then only to clergymen of the Diocese. As a general rule, assistance will be in the form of a one-off payment. When assistance is given, regard

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will be made to the requirements of the Australian Taxation Office (in Australia) and the implications for any government assistance already obtained

A clergyman will be deemed to be in severe financial hardship if because of unforeseen circumstances his household income is insufficient for reasonable expenses such as rent, groceries, utilities and communications, minimum loan repayments, school fees and medical expenses.

Assistance can also be provided on specified compassionate grounds. Such assistance includes payments for:

- arrears on a mortgage to prevent the family home being sold by the lender
- urgent medical or dental treatment for the clergyman or a dependant not covered by the public health system or by any private medical insurance
- modification to a home or vehicle to accommodate the severe disability of a clergyman or a dependant
- palliative care for a terminal illness of a clergyman or a dependant
- expenses associated with a dependant's death, funeral or burial

Authorisation

+ Metropolitan Hilarion



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PROCEDURES

Budgeting for financial assistance

As part of the process of preparation for the budget presented to each triennial Diocesan Assembly, the Diocesan Treasurer will seek written expressions of interest for assistance, other than emergency assistance, from parishes, missions and emerging communities.

Such expressions of interest will be considered by the Diocesan Council in finalising the budget for presentation to the Diocesan Assembly.

Allowance will also be made in the budget for emergency assistance.

Consideration of claims from parishes, monasteries and communities

A decision with regard to assistance will be made by the Diocesan Council or a committee of the Diocesan Council only after consideration of the required information and a written submission that explains:

- Why assistance is being sought
- What alternatives have been identified and considered
- Whether the assistance is to be a loan, a grant or – in the case of a proposal to purchase property – an investment
- What implications the refusal of assistance would have

Should details of actual expenditure not in due course be provided in the event of assistance being approved, no subsequent application for assistance will be considered.

Requests for assistance in view of a catastrophic event such as an earthquake or fire should be accompanied by evidence of the same.

Consideration of claims from missions and emerging communities

A decision with regard to assistance will be made by the Diocesan Council or a committee of the Diocesan Council only after consideration of the mission or community plan and a written submission that explains:

- Why assistance is being sought
- What alternatives have been identified and considered
- Whether the assistance is to be a loan, a grant or – in the case of a proposal to purchase property – an investment
- What implications the refusal of assistance would have

Applications for assistance from Individuals

Applications for assistance must be made in writing and be supported by evidence. Applications should state if the assistance is to be a loan or a grant. Applicants must have explored all options, including Australian Government benefits, and not have the financial capacity to meet the costs they are applying for by any other means, such as savings. Applications for assistance from clergymen will be considered only by the members of the Diocesan Council in priestly rank.

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Timeframe for consideration of requests

Requests for assistance to individual clergymen will be considered and responded to within seven days of a written request for assistance, together with all supporting documentation, being received at the Diocesan Office.

Requests for emergency assistance from parishes and missions will be considered and responded to within fourteen days of a written request for assistance, together with all supporting documentation, being received at the Diocesan Office.

All other requests for assistance will be considered and responded to within twenty-eight days of a written request for assistance, together with all supporting documentation, being received at the Diocesan Office.

Decisions and review of decisions

In the event that an application for assistance is declined, written reasons for the decision will be provided. There is no right of review of any decision. Applications for assistance may nevertheless be resubmitted at any time.

Loans

Assistance in the form of a loan will only be given if the terms set out are agreed to.

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