## **COORDINATING PARTNER**& FINANCIAL ASSESSMENT ***“Option C”* *explained***

**PSF review**

A review of the **Partner Support Fund** (PSF) was undertaken by a working group consisting of current UCANZ co-chair David Hall, former chairs Marilyn Welch and Geoff Donovan, and Executive Officer Adrian Skelton.

The review was requested by the Biennial Forum in October 2015 because:

* Local churches receive up to four invoices from UCANZ and Partners
* Presbytery and Synod levies are significantly increased
* PSF calculation lacks a transparent basis
* Some congregations are confused about the purpose of the various assessments

Any replacement scheme should aim to be simple, transparent, and fair. The UCANZ Forum business meeting at Onehunga, on 27 October 2017, ratified the following recommendations of the UCANZ Standing Committee:

1. That Option C is accepted as the basis of a revised assessment scheme, with Phases 1 and 2 being in successive years.
2. That the necessary changes to *Procedures* be progressed for appropriate Partner approvals.
3. That, in particular, the term of Coordinating Partner be three years.
4. That there be discussion of the implications of Option C with Christian Churches and Congregational Union representatives and further consultation with synods, presbyteries and dioceses.
5. That the Partner Churches confirm that national assessments are compulsory for CVs.
6. That Standing Committee undertakes a review of these arrangements by July 2023.

**Option C**

**Phase 1** The first task is to re-schedule changes of Coordinating Partner, essentially re-starting the clock at **1st July 2018**. In conjunction with the local Partners – Synods, Presbyteries and Dioceses – UCANZ will balance the number of large/small and two/three-Partnered churches, so that each of the major Partners has a fair share of Coordinating roles in each region.

The role of the Coordinating Partner should be seen be separate from that of Appointing Partner. When a minister leaves, the Coordinating Partner convenes a meeting of Partner to determine who is to be the Appointing Partner (the Partner responsible for the appointing) – which may or may not be the Coordinating Partner. The Coordinating Partner continues their role of coordinating (convening) the Partners for the remainder of their three-year term.

The proposal does *not* alter the process of appointing ministry in a Cooperative Venture. As at present, it is the Partners who determine whose process shall be used. It is not a local church decision.

**Phase 2** will be implemented only after the rescheduling of Coordinating Partners is complete. From **1st July 2019**, and for a period of three years, *only* the Coordinating Partner will levy the local church at national and regional levels (or just diocesan, in the case of the Anglican Partner), but at the normal denominational rate. Participating Partners will continue, as now, to be involved with the local church at times of review, ministry settlement, and with property matters.

*Below is the notional timetable*:

**-March 2018** Further consultation with regional bodies and

 allocation of Coordinating Partners

**April-May 2018** Amendment/approval of Coordinating Partner schedule by Dioceses, Synods and Presbyteries

**1July 2018** Re-scheduling of Coordinating Partner begins

**5 July 2018** UCANZ Standing Committee meets at Miramar

Meanwhile, the Ecumenical Committee of the Anglican Church, the Methodist Conference (or President) and Presbyterian Assembly (or Council of Assembly), Christian Churches and the Congregational Union will be asked to agree technical changes to Chapter 2 of *Procedures*.

**1st July 2019** Coordinating Partners also becomes the sole financial assessors for periods of three years with subsequent changes in Coordinating Partner in 2022, 2022, etc.

Change of Coordinating Partner at 1 July fits with the financial year of Methodist and Presbyterian Churches. Most Anglican CVs have a January-December financial year so their “three” financial years will be “half-a-year, two years and half-a-year”.

For local churches, there may be a change in the *level* of assessment every three years, which needs to be budgeted for. Partners will be encouraged by UCANZ to align their levels of assessment, but ultimately it will be for the Coordinating Partner to set its assessment – subject to any denominational appeals.

**Option C** is radical yet simple in concept, and brings the benefits of *transparent* assessment for local churches – just what the 2015 Biennial Forum requested.

**LOCAL CHURCHES**

Each Cooperative Venture has two or three Partners *all the time*! This does not change. The initial determination of Coordinating Partner from 1 July 2018 for each local church is the responsibility of the respective Partner Churches and UCANZ. Every three years, the roles of Coordinating and Participating will rotate automatically – or with a reminder from UCANZ.

**REGIONAL COURTS AND DIOCESES**

During the initial scheduling phase, Regional Courts will be invited by UCANZ to engage with balancing the allocation of Coordinating Partner roles. Every three years from 1 July 2019, there will be a re-alignment of Coordinating roles. Each Diocese, Synod and Presbytery will be reminded by UCANZ of which church now come under its Coordination and financial assessment.

**MCNZ and PCANZ**

Similarly, both the Methodist and Presbyterian national Churches will be reminded which of their Cooperative Ventures should now be assessed nationally for three years

**CCNZ and CUNZ**

Christian Churches and the Congregational Union are being consulted about their involvement in Coordinating and Participating roles and the mechanism by which they will receive their share of assessments.

**Adrian Skelton**

**UCANZ** | Executive Officer

**28.11.2017**