

*Copies obtainable from*

**The Diocesan Office  
P O Box 181  
Grahamstown  
6140**

**Price: R5**

# **Handbook for Churchwardens and Parish Councillors**



*Diocese of Grahamstown*

*2001*

## Appendix 5: Application Form Building Projects

1. **PARISH:** .....
2. **ADDRESS:** .....
3. **CHAPELRY or OUTSTATION:** .....
4. **NATURE OF PROPOSED BUILDING:** (Delete where necessary) Church, or School or Hall, or Rectory, Other (specify) .....

### BUILDING PLANS:

5. Who drew the plans? .....
6. Has the Local Authority approved them? YES / NO

### FINANCE:

7. What is the estimated cost of the whole project? R .....
8. How much has the Parish in hand for this project? (Provide substantiating documentation).  
R.....
9. Difference between cost and Cash (7-8) R.....
10. How will any shortfall be made up? .....
11. Are you applying to the Diocese for a grant? YES/NO  
If yes how much do you need? R.....
12. Do you need a loan from the Diocese? YES/NO  
If yes how much do you need? R.....  
How do you propose to repay this? .....
13. Estimated date of completion: .....
14. What is your Parish Assessment for this Year? R.....
15. Are you up to date with your Assessment? YES / NO  
If no when will you be up to date? .....
16. Will you be able to keep up your Assessment Payments? YES / NO  
If no what do you propose to do about this? .....

### PARISH SUPPORT:

17. When was your Vestry Meeting held to discuss this proposed project? .....  
Please include a copy of the resolution passed and any comments made. Were any parishioners opposed to this project? YES / NO.  
If "yes" give reasons .....  
Signed at .....on this.....day of.....20.....  
Rector.....  
Churchwarden:..... Churchwarden: .....

### ARCHDEACON'S SUPPORT:

I .....(name), Archdeacon of ..... am satisfied that this Parish can afford this project and I approve and support this application.  
Signed: .....  
Remarks .....

### NB:

1. It is essential that the archdeacon be consulted and involved from the very first stages of building project.
2. The archdeacon may ask a person. or a group, to deputize on his behalf in this process.

## Appendix 4: Parish Property Details (Form B)

| <b>FORM B</b><br>(To be completed with the Annual Financial Return)<br><br><b>Diocese of Grahamstown</b><br><br>Parish property details for the year: _____<br>(Please use a fresh Form B for each property attached to the parish) |  |
|---|--|
| Name of Parish:   |  |
| Archdeaconry:   |  |
| Description of property:  |  |
| Property address:   |  |
| Name of tenant:   |  |
| Monthly rental:   |  |
| Length of lease (if any):   |  |
| Expiry date of lease:   |  |
| Any further details:  |  |

## Handbook for Churchwardens and Church Councils

### Preface

I'm sure that as you read and reflect on this booklet you will wonder how you can ever fulfil the obligations placed upon you as a Churchwarden, but be encouraged! You have been elected by God's people, as they have discerned in you the leadership and administrative gifts required for this ministry, and God, who is faithful, will give you the grace to complete the task to which He has called you (John 15:5 & 6).

### 1. Introduction

- 1.1 The purpose of this Handbook is to provide Churchwardens with a guide to what the Church expects of them. They have certain duties laid down in the Church's law books, "The Constitution and Canons of the Church of the Province of Southern Africa" and "The Acts of the Diocese of Grahamstown". These books alone have legal authority and nothing in this Handbook should be interpreted in any way that conflicts with them.
- 1.2 The Church expects a great deal more from Churchwardens than the mere fulfilment of these legal obligations. "The letter of the law kills; the Spirit gives life" (2 Cor. 3:6). As "the principal representatives of the congregation", Churchwardens have a very real responsibility as lay leaders in the community. But they are also the Bishop's officers and, as such, have a special responsibility for keeping him/ her informed about the life of the parish. The spirit in which they fulfil these obligations can make all the difference.

### 2. Historical and Theological Background

- 2.1 We look to the New Testament for the basis of every kind of Christian calling or ministry. In the Acts of the Apostles we read, "...the twelve apostles called the whole group of believers together and said, 'It is not right for us to neglect the preaching of God's word in order to handle finances. So then... choose seven... among you who are known to be full of the Holy Spirit and wisdom, and we will put them in charge of this matter. We ourselves, then, will give our full time to prayer and the work of preaching'" (Acts of the Apostles, 6:2 Good News Bible).

2.2 No matter how churches organise financial control, they all follow the pattern set out in Acts 6, with its witness to the necessity of setting ministers of the gospel free from administrative duties so that they can concentrate on proclaiming the faith of Christ. Others must look after finance, and in our church this role is carried out by Churchwardens. Like the deacons of Acts 6, they need to be people “full of the Holy Spirit and Wisdom”.

2.3 Administration is essential to the preaching of the gospel. The call to fulfil this role and the gift of grace to carry it out are both sacred. St Paul included administrators in a list of people with the gifts of the Spirit: “God has appointed first apostles, second prophets, third teachers, then workers of miracles, healers, helpers, administrators, speakers in various kinds of tongues” (1 Cor. 12:28). The Churchwardens’ role is a vital ministry in the church.

### 3. Principal Responsibilities and Duties of Churchwardens

3.1 Churchwardens are the Bishop’s Officers. At liturgical services they immediately precede the Bishop in procession. They are seen as the principal representatives of the congregation as they attend on him (Canon 29 7(a), page 67). The Churchwardens shall be people who are faithful in worship and service.

3.2 It is the Wardens’ function to welcome the bishop whenever he visits the parish. They must make arrangements for his physical comfort.

3.3 Should it become necessary, it is the duty of the Wardens to report to the Bishop: “if there should be anything plainly amiss or reprehensible in the life or doctrine of the priest or in his ministration of the services of the church.” (Canon 29 7(c), page 68).

3.4 The Wardens are responsible for presenting the financial accounts at Vestry meetings. Without such accounts, there are no valid canonical elections at a vestry meeting (Canon 27.6, page 64, 29.7 (iv), page 68).

3.5 With the priest, it is the duty of the Churchwardens to convene Vestry Meetings (Canon 27, page 63).

## Appendix 3: Parish Statistics (Form A)

| FORM A  |                           |
|---|---------------------------|
| (To be completed with the Annual Financial Return)          |                           |
| Diocese of Grahamstown                                      |                           |
| Parish statistics for the year: _____                       |                           |
| Name of Parish: _____                                       | Archdeaconry: _____       |
| Number of units on the Parish Roll                          |                           |
| Number of acts of Communion during the year (from Register) |                           |
| Number who are pledging                                     |                           |
| Number of professionals and employed on Parish Roll         |                           |
| Number baptised during year                                 |                           |
| Number confirmed during year                                |                           |
| Number of marriages during year                             |                           |
| Number of funerals during year                              |                           |
| Number of Lay Ministers in Parish                           |                           |
| Number of Lay Ministers in Chapelries attached to Parish    |                           |
| Chapelry Congregations: (list below)                        | Estimated no. of families |
| 1 _____   |                           |
| 2 _____   |                           |
| 3 _____   |                           |
| 4 _____   |                           |
| 5 _____   |                           |
| 6 _____   |                           |
| 7 _____   |                           |
| 8 _____   |                           |
| 9 _____   |                           |
| 10 _____  |                           |
| 11 _____  |                           |
| 12 _____  |                           |

### LIST OF LIABILITIES

## 1 LOANS

| Type of Loan | Name of Institution | Balance as at 31 December |
|--------------|---------------------|---------------------------|
|--------------|---------------------|---------------------------|

[illegible]

## 2 ACCOUNTS PAYABLE

| Creditor | Balance outstanding as at 31 December |
|----------|---------------------------------------|
| ...      | ...                                   |

-----

## LIST OF ASSETS

INVESTMENTS AT BANKING INSTITUTIONS:

| Institution | Type of investment | Amount |
|-------------|--------------------|--------|
|-------------|--------------------|--------|

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PLEASE ATTACH ALL CERTIFICATES OF BALANCE AND INTEREST EARNED TO THIS PAGE.** All certificates must be originals obtained from the relevant Banks.

Churchwardens:

Name \_\_\_\_\_ Address \_\_\_\_\_ Signature \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_ Signature \_\_\_\_\_

Treasurer:

Name \_\_\_\_\_ Address \_\_\_\_\_ Signature \_\_\_\_\_

**Incumbent:**

| Name | Address | Signature |
|------|---------|-----------|
|------|---------|-----------|

## Report of Auditor or, if not available, a competent Scrutineer

<sup>1</sup>We have examined the financial statements set out on pages 2,3 and 4. My/Our examination included such procedures as I/we considered necessary

In my/our opinion these statements fairly present the financial position of the Congregation/s as at 31 December 20... and the results of its operations for the period/year then ended, in conformity with generally accepted accounting practice

Date \_\_\_\_\_

Signature

- 3.6 When the priest is unexpectedly ill or absent, it is the duty of the Wardens to arrange with the Archdeacon that services take place.
- 3.7 The Churchwardens and the Priest together form the Executive of the parish whose duty it is to administer the affairs of the parish between Parish Council meetings (Canon 29:7(a), page 67). It is suggested the Parish Treasurer (where there is one) should be a member of the executive.

#### 4. Parish Registers and Books of Reference

**Canon 32, page 71**

**Acts of the Diocese Chapter X. section E page 39**

- 4.1 At least one copy of the Provincial Constitution and Canons should be available to Wardens and councillors in each parish. These are available from:

CPSA Publishing Dept.,  
Box 61394,  
Marshalltown, 2107.

Particular attention should be paid to Canon 29, page 66.

- 4.2 A copy of the Acts of the Diocese of Grahamstown shall be kept in the Vestry of each Pastoral Charge and Chapelry in the Diocese. (Acts Chapter X 36, page 41).
- 4.3 Each congregation must have a Service Register which must be completed in full at the end of every service.
- 4.4 Each parish must have a Baptism Register, Marriage Register, Inventory of all moveable property, Inventory of all immovable Property, Parish Church Council and Vestry Meetings Minute Book (Canon 32, page 71; Acts Chapter X. E., page 39).
- 4.5 An up-to-date parish roll must be kept by the Wardens. It should contain the name and address of all parishioners entitled to vote at Vestry Meetings. The Wardens must table the Roll at every Vestry Meeting. (Canon 32 sec. 1, page 71; Acts Chapter X sec E (25), page 39).



## RECEIPTS

[illegible]

**Since the property belongs to the Diocese (and not the Parish) the necessary permission must be obtained in advance from the Diocesan Trusts Board. An application form for BUILDING PROJECTS (see copy in the Appendix to this booklet) is obtainable from the Diocesan Office or the Archdeacon.**

- 5.4 The Church Council is responsible for the maintenance and upkeep of all buildings belonging to the church.
- 5.5 The Council is responsible for ensuring that all buildings are adequately insured through the Diocesan Office. The Parish Council must advise the Diocesan Office of all alterations, additions or sale of buildings, for insurance purposes.

## 6. Responsibility for and to the Priest

**Acts chapter V sec 11, page 18**

- 6.1 The parish is responsible for ensuring that their priest has a good standard of living. In particular, the parish must pay an adequate allowance for the priest's electricity, water, gas or other heating and cooking fuel, official telephone, postage, stationery and other office expenses (Acts Chapter V sec 11(b), page 17).
- 6.2 The Churchwardens are responsible together with the priest for the planning of his/her time and for professional and spiritual support (Canon 29 4 (b)).
- 6.3 The Parish should take notice of the welfare of all stipendiary clergy.
- 6.4 The parish is entirely responsible for the cost of their priest's transport on parish work. Where a priest uses his/her own personal vehicle, the parish is responsible for all the running costs in connection with parish work plus a contribution towards the capital cost of the vehicle. This is normally achieved by the Diocesan Council setting a rate to be paid per km for each km travelled on parish work. The Church Council and priest are to agree each year on the maximum number of km per month the parish will pay for in connection with parish work.



## 7. Finances

### Acts Chapter X sec. D (19), page 38

- 7.1 An estimate of Income and Expenditure budget for the year must be prepared and submitted for approval at every Annual Vestry Meeting.
- 7.2 The Wardens must report to each meeting of the Church Council on how the actual figures for the year to date match the estimates (Acts Chapter X sec D (19), page 38).
- 7.3 Each year, every parish needs a pledging/ stewardship programme when every parishioner will be taught and encouraged to make a generous pledge to the parish.
- 7.4 In addition to a Treasurer (if appointed to assist the Wardens in their financial management), every parish must have an auditor or other competent scrutineer who will certify that the annual accounts are correct and give advice when asked to do so. The name, qualifications and relevant experience of this person must be submitted to the Archdeacon for approval before the appointment is made (Acts Chapter X sec A (4), page 36).

### Investments

- 7.5 The Diocesan Trustees offer the service of investing parish reserve funds. Although this money will be available on request, only those funds which might reasonably be invested for several months should be sent to the Trustees. The rate of interest paid annually may be better than the parish could achieve by itself (Canon 42 par 11.c, page 101).
- 7.6 Parishes may invest their own reserve funds with national banks and building societies. If a parish wishes to make an investment elsewhere than with national banks and building societies, the prior approval of the Diocesan Trustees must be obtained.
- 7.7 Any bookkeeping system may be used provided that it will supply the information required in the Annual Financial Return.

## Appendix 2: Annual Financial Return

No. ....

### DIOCESE OF GRAHAMSTOWN

PASTORAL CHARGE : .....

ARCHDEACONRY : .....

CONGREGATIONS INCLUDED IN THIS RETURN : .....

.....

### ANNUAL FINANCIAL RETURN

FOR THE TWELVE MONTHS ENDED .....

[Four copies required: - One to be sent to the Diocesan Secretary, Box 181, Grahamstown, 6140, as soon as possible after your Annual Accounts have been approved. One to the Archdeacon. One to the Rector. One to be retained by the Church Wardens.]

#### N.B.:

Pages 3 & 4 are a Receipts and Payments Account. In other words, a summary of your Cash Book for the twelve months. Page 4 calls for a list of all monetary assets belonging to the parish, with Certificates of Balance from all the relevant banking institutions.

A separate set of forms is required to be completed in respect of each congregation in the Diocese, except where the finances of congregations are handled jointly, where they may be included in one return. If additional forms are required, please apply to the Diocesan Office.

#### Please note:

A copy of the published accounts laid before the Vestry must accompany this return.



## Appendix 1: Quarterly Return

### DIOCESE OF GRAHAMSTOWN Quarterly Return

Name of parish: \_\_\_\_\_ Town: \_\_\_\_\_

Archdeaconry: \_\_\_\_\_ Contact person: \_\_\_\_\_  
Tel. No.: \_\_\_\_\_

Statement of Receipts and Payments for the quarter ended: \_\_\_\_\_

N.B. One copy to each: the Diocesan Secretary, your Archdeacon and your Parish.

| Receipts                     | R | c | Payments                   | R | c |
|------------------------------|---|---|----------------------------|---|---|
| Dedicated Giving             |   |   | Diocesan Assessment        |   |   |
| Offeratories                 |   |   | Administration             |   |   |
| Donations                    |   |   | Audit fees                 |   |   |
| Rent Received                |   |   | Insurance premiums         |   |   |
| Interest Received            |   |   | Electricity & water        |   |   |
| Sundry Income (itemise):     |   |   | Postage                    |   |   |
|                              |   |   | Stationery and Printing    |   |   |
|                              |   |   | Staff wages                |   |   |
|                              |   |   | Telephones                 |   |   |
|                              |   |   | Maintenance - equipment    |   |   |
|                              |   |   | Maintenance - buildings    |   |   |
|                              |   |   | Sundries                   |   |   |
|                              |   |   | Ministry                   |   |   |
|                              |   |   | Travel Allowance           |   |   |
|                              |   |   | Easter & Whitsun offerings |   |   |
|                              |   |   | Wine, wafers, candles      |   |   |
|                              |   |   | Donations                  |   |   |
|                              |   |   | Funds invested             |   |   |
|                              |   |   | Other Payments (itemise)   |   |   |
|                              |   |   |                            |   |   |
| Total Receipts               |   |   | Total Payments             |   |   |
| Bal. at beginning of quarter |   |   | Opening Deficit (if any)   |   |   |
| Closing deficit (if any)     |   |   | Balance at end of quarter  |   |   |
| BALANCING TOTAL              |   |   | BALANCING TOTAL            |   |   |

## Rules (whatever bookkeeping system is used)

- 7.8. The parishioners are entitled to know how much money the parish has received and what has been done with it. There is nothing secret or confidential about church finances. Tell the parishioners at least *quarterly* what money has been received and on what it has been spent. After the Parish Council meeting, send the completed Quarterly Return to the Diocesan Office.
- 7.9 All money received must be receipted, written in the Books and banked without any delay.
- 7.10 Proper receipt books can be bought or printed.
- 7.11 The receipt must be issued at the time the money is received. This means that collections, umjikelo and special collections, pledges, etc must be counted immediately at the end of a service. The counting must be done by at least two people, (the more the better) both of whom will sign the receipt. The receipt must include details of where the money is from, and what it is for. It must be dated in full (including the year).
- 7.12 At an outstation, at least one of the counters will be the responsible person at the outstation. S/he must insist on being given a receipt for all money he sends to the parish.
- 7.13 This means that anyone from the parish (including the priest) who visits an outstation, must carry a receipt book in order to give a receipt for any money received. When the money is handed over for banking, the duplicate of the receipt must be checked and the amount agreed.
- 7.14 When money is received at the Offertory at a service, it must be **either** immediately locked up by 2 people, **or** kept in the plain sight of everyone until the end of the service - on the altar is a good place. Then taken away to be counted - again by 2 people. Whoever is doing the bookkeeping and banking must check that the money received and banked agrees with the receipts issued. Again, involve as many people as possible.
- 7.15 **All money received MUST be banked. It is not acceptable to spend cash received before it is banked.**

- 7.16 All expenditure must be by cheque. In cases where cheques are not acceptable, a cheque for the exact amount required must be cashed. It is one of the duties of the Wardens to ensure that the parish pays its debts timeously. The Church gets a bad name when parishes do not pay their accounts.
- 7.17 If petty cash is used in places where cheques cannot be cashed, it must be drawn from the bank as needed and a careful record of it kept.
- 7.18 Cheques must be signed by two people, from a panel of signatories. The Archdeacon or Diocesan Secretary may relax this rule where absolutely necessary.
- 7.19 Cheques must not be made payable to **cash**. The name of the person cashing a cheque should be written on the cheque.
- 7.20 The people signing the cheques are responsible for the expenditure. They ensure they know what the cheque is for by examining the relevant invoices or other vouchers. **Never** sign a blank cheque.
- 7.21 All bank statements, paid cheques, receipt books, invoices, pledge/ umjikelo registers must be safely kept for audit purposes.
- 7.22 To avoid distrust and suspicion of the priest and church officers in a parish, no one person must be responsible for either income or expenditure at any time. At least 2 people must be involved and more would be better. This applies at outstations as well as in the parish church.

## 8. Annual Returns

- 8.1 Vestry Meetings must be held by the Second Sunday after Easter. (Acts Ch X sec A 1 (I), page 36).
- 8.2 Each parish is responsible for sending four Annual Returns to the Diocesan Office by the 31<sup>st</sup> May *at the latest*:
  - Annual Financial Return
  - Parish Statistics (Form A)
  - Parish Property Details (Form B)
  - Vestry Meeting Return (list of Churchwardens elected)

These returns should be made as soon as possible after the end of the Financial year.

- 8.3 Forms for these returns will be sent to each parish at the beginning of each year. The Financial and Statistical Returns should be returned to the Diocesan Office by 31<sup>st</sup> of May, the Vestry Meeting Return after the Annual Vestry Meeting.
- 8.4 When the Diocesan Office requests other information during the year, these requests must be responded to timeously.

## 9. Organisations

- 9.1 Parish organizations such as men's, women's, youth, Sunday School, servers', choir, etc are all part of the parish and their finances are part of the parish finances. All monies raised in the name of the church should be reflected in the parish accounts.
- 9.2 Where organizations are allowed by the Church Council to manage their own funds, this management should be reported in full to every meeting of the Church Council.

**Nothing in this document may be construed as adding or removing from the Canons and Constitutions of the Church of the Province of Southern Africa or from the Acts of the Diocese of Grahamstown. In case of doubt it is the duty of Churchwardens and Parish Councillors to consult official documents, their Archdeacons or the Diocesan Secretary.**

*Thanks to the Dioceses of Kimberley and Kuruman and Port Elizabeth for permission to quote portions of documents.*

## Appendices:

|                                       |         |
|---------------------------------------|---------|
| 1. Quarterly Return                   | Page 12 |
| 2. Annual Financial Return            | Page 13 |
| 3. Parish Statistics (Form A)         | Page 17 |
| 4. Parish Property Details (Form B)   | Page 18 |
| 5. Application Form Building Projects | Page 19 |