

# Completing the 2020 parish survey form – your step-by-step guide

I recommend that a minimum of two people, who know their congregations well, are appointed by the PCC to oversee the completion of this survey. If there is more than one church in the parish, then two people per church would be a good idea, with one overall coordinator who will be responsible for completing and returning the form.



## Our Common Fund

This survey is used to calculate your Parish Share contribution in to the Common Fund.

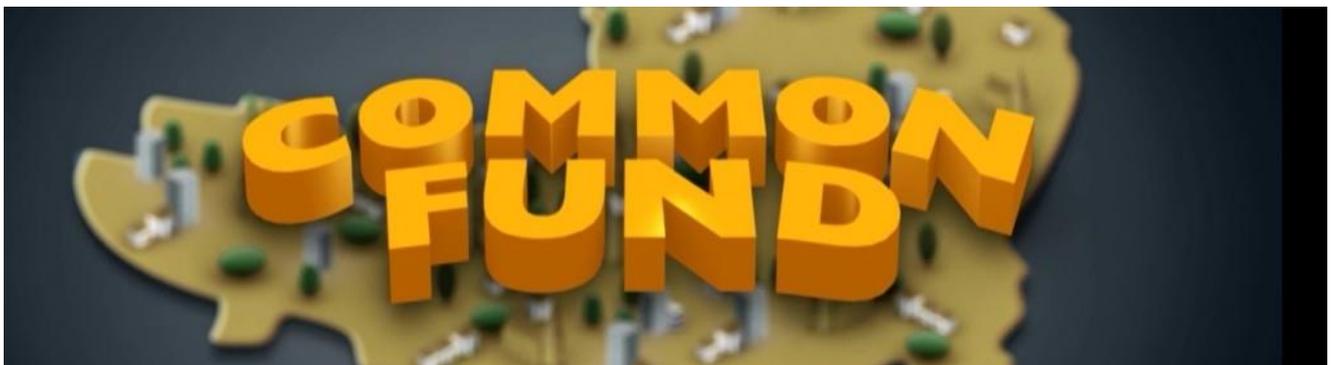
Please take some time to view the short film which explores the work of the Diocese of Bath and Wells. It looks at a typical week in the life of our churches, clergy and volunteers to paint the big picture of us all working together as God's church.

This work is only made possible by our churches generously contributing through their 'parish share' into our Common Fund. We all give and we all receive.

By supporting each other in our giving we are able to achieve so much more as one body than we could ever do alone.

The film is available on the link below.

[www.bathandwells.org.uk/supporting-parishes/finances/common-fund/](http://www.bathandwells.org.uk/supporting-parishes/finances/common-fund/)



## Completing the 2020 Survey form - Checklist

1. Please note the change; members are now known as Regular Worshippers.
2. Look at our audio-visual guide which you can view at: [www.bathandwells.org.uk/calculating-parish-share](http://www.bathandwells.org.uk/calculating-parish-share)
3. Make sure the survey form is on the agenda for a PCC meeting before the submission date.
4. The appointed PCC representatives should meet at least once, armed with:
  - the list of names of those included on last year's regular worshipper list;
  - the numbers and/or names of those included on the Statistics for Mission form as being part of the parish's Worshipping Community;
  - any other lists/record-cards available of newcomers and others involved with the parish.
5. Before completing the boxes on the survey form, and using the criteria in this booklet, consider every name on last year's list as to whether that person is still a Regular Worshipper, and then check any other list for possible additions.

**Please accurately record your parish regular worshipper figure and select a category that accurately describes your congregation. In doing so you are playing your full part in resourcing ministry and mission across the diocese, in particular the ministry of parochial stipendiary clergy.**

## Part 1: Parish/Church Regular Worshippers

**Please note the change; members are now known as Regular Worshippers. Please read the guidance below to decide who to include- this has changed since last year**

### **Box 1—Enter your current number of Regular Worshippers**

This is your **most up-to-date figure** and is normally assessed for your parish. Churches are rarely assessed separately, and an explanation is required if this is the case. **DO NOT USE THE OCTOBER COUNT.**

### **Who should you include as a Regular Worshipper?**

- A Regular Worshipper of your parish is any person, aged 18 or over, who attends an act of worship in your parish regularly (normally at least once a month), including those who are temporarily absent due to ill health, holiday/business or other reasons.
- Those who attend midweek services or have home communions.
- Those who attend less regularly, or do not attend at all, (e.g. in a care home) but still make regular financial contributions and are not regular worshippers at another church and who regard themselves as a worshipper
- Those who are a part of a Fresh Expression of church (e.g. Messy Church, Café Church) **and are considered to be a Regular Worshipper.** \*
- Clergy should be included. Agree within the benefice where they should be counted, but please ensure they are not counted twice.

\* A Fresh Expression of Church is a regular gathering of people aimed at those who do not attend other services in church. A fresh expression has its own identity away from other congregations in the church and, while it will include a form of worship, it may not look like church i.e. it may not meet on Sundays or in a church building. For more information go to [www.bathandwells.org.uk/fresh-expressions-audit](http://www.bathandwells.org.uk/fresh-expressions-audit). In the downloads section there is a flow chart to help you discern whether all or some people who attend these Fresh Expressions of church should be counted as Regular Worshippers.

**You should not include** as Regular Worshippers those who:

- are visitors, holidaymakers, baptism parties etc.
- consider their 'home' church to be in another parish (please pass their names to their home parish so they are included in the right parish's Regular Worshippers and not counted twice).
- receive ministry but have no other connection with any church in your parish such as residents of care or residential homes who receive Holy Communion because the home is in the parish.
- are only present as a carer for a worshipper.
- attend regularly but do not have mental capacity (e.g. have dementia), are unable to manage their own finances (and cannot therefore contribute).

**Regular Worshipper:** If you are uncertain which is the individual's 'home' parish, just ask them!

If students who are resident during term time only make up more than 15% of your total Regular Worshippers, please contact the Finance Department.

## Part 1: Regular Worshippers (*continued*)

### How to count total Regular Worshippers

- Many churches have a master list of names of those who attend regularly. The diocese expects PCCs to keep a list of Regular Worshippers and review it each year.
- The **Worshipping Community** (from the latest Statistics for Mission form) and **Previous Year declared Regular Worshippers (formerly members)** numbers are provided in the grey box for comparison. Worshipping Community should be the same, or very similar to, Regular Worshippers.
- **Electoral Roll** numbers are provided as an indicator but **should not** be used as the Regular Worshipper figure.

**Box 2a**— Enter the number of **new Regular Worshippers this year** that are new to the parish (exclude transfers from other parishes).

### Who are new Regular Worshippers?

New Regular Worshippers (for entering on the survey form) are those who have not been Regular Worshippers of another parish recently or have just reached the age of 18 (and so may not yet be fully used to the theology and practice of giving). These Regular Worshippers will be phased into the Parish Share calculation over the following three years.

**Box 2b**—The number of new Regular Worshippers declared on your last survey form is recorded here. Please state how many of these are still Regular Worshippers this year. This is to enable continued phasing-in. This will be the second year of the three-year phase-in as described above.

**Box 2c** – If there is a notable difference in Regular Worshippers to last year, or to the latest Worshipping Community number, please explain it here. An explanation is also needed where there is a large turnover (new Regular Worshippers/leavers – although number of leavers is not required).

## Part 2: Socio-Economic Category

### Box 1 - Selecting a category

Each parish is asked to prayerfully assess its socio-economic category by choosing a category between A (most favourably placed) and G (least favourably placed), according to the circumstances of the individuals making up the **Regular Worshippers** (not the local community). This is relative to other parishes in the diocese.

**When compared with other parishes in the diocese the Regular Worshippers in our parish are:**

<b>Category A:</b>	Most favourably placed
<b>Category B:</b>	Favourably placed
<b>Category C:</b>	Favourably to evenly placed
<b>Category D:</b>	Evenly placed (Mid)
<b>Category E:</b>	Evenly to unfavourably placed
<b>Category F:</b>	Unfavourably placed
<b>Category G:</b>	Most unfavourably placed

### How to choose a category

You can include the following considerations:

- Proportions of home and car ownership.
- Are Regular Worshippers paying tax (and therefore eligible for gift aid).
- Compare your situation not just with nearby parishes, but also with parishes in other socio-economic areas across the diocese.
- It may be helpful to seek the advice of those who have a wider knowledge of the parishes in our diocese such as your Area Dean, Lay Dean or Archdeacon.

### Box 2 – Last year category

Your declared Socio-economic category in 2019 is stated here for information.

### **If your category has changed**

An explanation must be provided if the category has changed, particularly if it is now less favourably placed, detailing what has changed in the parish to result in the change of category. A change should be based on changes to the make-up of the Regular Worshippers, not because the parish itself has any changes to finances. Changes will be discussed at the archdeaconry scrutiny groups, so you should ensure your Area Dean and Lay Dean fully understand the reasoning.

### **S Category Parishes**

A parish in an area of great deprivation, or in an extreme circumstance for a limited period, may be classified as an S category parish. This is usually temporary and can only happen upon Deanery recommendation and with Archdeacon support. Any request to be considered for S category status should be made at the earliest opportunity. Such parishes are allocated an agreed parish share and required to engage with Diocesan Board of Finance officers to work towards returning to a normal category. **All** parishes should declare a normal category A to G on this form. In the 2020 share allocation, thirteen parishes were classified as S category.

### **Unexpected changes**

If the number of Regular Worshippers changes significantly after submitting your completed survey, it may be possible to adjust Regular Worshippers number up to the end of September. Please contact Jessica Cook with any significant changes as soon as you can.

### **Corrections to previous errors**

If the change is notified to us after Parish Share has been set, it will not be possible to alter the allocated Parish Share, but you will need to enter the correct figures on the following year's survey form.

### **Part 3: Declaration**

Please ensure that all the named officers sign to confirm that they have read this booklet and that the survey form has been explained to and reviewed by the whole PCC.

**Please note that changes to parish share are not possible once it has been set**, so it is important that each signatory has reviewed the declared Regular Worshippers and category, as these both directly impact on the share contribution that will be requested the following year.

### **Benefice Ministry Allowance (BMA)**

Benefices may qualify for the allowance if they have more than 150 Regular Worshippers per stipendiary minister (excluding curates) and more than 100 Regular Worshippers in total. If you think that your benefice qualifies and have not received an application form, please contact Jessica Cook using contact details given on page 11.

## Parish Share timetable

<b>January</b>	PCC agrees who will be appointed to complete the survey count.
<b>February / March</b>	Survey forms completed by designated person(s).
<b>By end April</b>	<b>PCC discusses and agrees the Survey Form.</b> <b>All named officers sign</b> the form and return it to the Diocesan Office in Wells for the attention of the Parish Share Officer. A copy should be kept for your records together with your list of Regular Worshippers.
<b>May to August</b>	Every survey form is discussed in meetings between Archdeacons, Area Deans and Lay Deans. You may be contacted to clarify or check figures.
<b>Mid September</b>	The DBF Finance Team can give an estimated share projection for 2021 on request subject to final approval.
<b>Mid October</b>	Diocesan Synod is asked to approve the budget. No further changes to individual parish shares are possible as to do so would affect all other parishes.
<b>Early November</b>	Details of the 2021 Parish Share contributions distributed to parishes.

## Contact Details:

Please address any queries relating to the survey form to:

**Jessica Cook** (Parish Share and Stipends Officer)

(E): [Jessica.Cook@bathwells.anglican.org](mailto:Jessica.Cook@bathwells.anglican.org) (T): 01749 685126

For help with parish giving reviews, applying for grants and advice relating to category choice:

**Gary Watson** (Giving and Funding Adviser)

(E): [Gary.Watson@bathwells.anglican.org](mailto:Gary.Watson@bathwells.anglican.org) (T): 01749 685270

**Sue Whitehead** (PA to the Giving and Funding Adviser)

(E): [Sue.whitehead@bathwells.anglican.org](mailto:Sue.whitehead@bathwells.anglican.org) (T): 01749 670777

## Useful Resources:

**Diocesan Website**

[www.bathandwells.org.uk/parish-share](http://www.bathandwells.org.uk/parish-share)

[www.bathandwells.org.uk/supporting-parishes/finances/common-fund/](http://www.bathandwells.org.uk/supporting-parishes/finances/common-fund/)

**Parish Resources Website:**

[www.parishresources.org.uk](http://www.parishresources.org.uk)