



# Scottish Episcopal Church DIOCESE OF EDINBURGH

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11 November 2016

## TO ALL INCUMBENTS, PRIESTS IN CHARGE, VESTRY SECRETARIES & TREASURERS

The time of year has, again, arrived when various end-of-year forms are needed. We issue these knowing that, for many of you, they will be completed in your spare time, as you give your time voluntarily. We *do* appreciate that, and are grateful for all that you do for the congregation you are a part of.

We will be posting out paper copies very soon, so that you have the choice as to how to fill them in. These are the forms required:

1. **Diocesan Schedule** – As a trial, this year, you can fill this in using an interactive online form using Google Forms – here is the link: <https://goo.gl/forms/Tch80HsXtnQt9zex1> You may find this easier to complete this way, and it also helps the way we handle them here. *Also, this year, we have incorporated the Lay Rep Return, so there are now fewer individual forms.*
2. **Finance Schedule** – This has been revised, so any previous blank version you have is now out of date. *Please also send in the Annual Accounts which were approved at your AGM.*
3. **Congregational Statistics** – To be completed NOT LATER THAN 10 DAYS AFTER THE EVE OF ADVENT SUNDAY
4. **PVG Checklist** – For your PVG Coordinator to fill in.

If you need extra/individual copies of any of them, just let me know. Ultimately, **we must have everything back by 31<sup>st</sup> January 2017.** We use the information to:

- Calculate diocesan quota
- Provide the Province with a means to calculate Provincial Quota
- Get the right number of seats at General Synod
- Know which lay members to invite to Diocesan Synod to represent you
- And much more.....

In the meantime, if you have any queries, please do let me know, and I will do my best to help.

With all good wishes and thank you for doing this once-a-year bit of administration.

Yours faithfully,

Simon C Filsell  
**Diocesan Administrator**

# DIOCESE OF EDINBURGH

## Forms Checklist

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### RECTOR/PRIEST-IN-CHARGE

- Congregational Statistics

### VESTRY SECRETARY

- Diocesan Schedule & Lay Representative Return <https://goo.gl/forms/Tch80HsXtnQt9zex1>

### TREASURER

- Annual Accounts
- Finance Schedule

### PVG CO-ORDINATOR

- PVG Annual Report (Checklist)

# Scottish Episcopal Church

This Return should be forwarded to the Diocesan Office **not later than 10 days after the Eve of Advent Sunday**, in accordance with Canon 50.

The Return is sent in duplicate and the Rector or Priest-in-Charge is requested to preserve a copy for reference.

**Note: Before completing this form read the notes overleaf**

RETURN of the state of the Congregation of

during the Year ending on the Eve of Advent Sunday 2016

	Numbers			Notes
	Male	Female	Total	
1. Estimated number of Persons of all ages belonging to the Congregation <i>(Note 1)</i>	Male	Female	Total	
2. Number of Persons on the Communicants' Roll as defined by Canon 41.2 <i>(Note 2)</i>	Male	Female	Total	
3. Number of Persons Baptised – under 6 <i>(Note 3)</i>				
4. Number of Persons Baptised – over 6 <i>(Note 4)</i>				
5. Number of Children admitted to Communion post-Baptism, pre-Confirmation				
6. Number of Persons Confirmed				
7. Number of Marriages solemnised				
8. Number of Burials or Cremations				
9. Number of Celebrations of Holy Communion – Public, Private and House <i>(Note 9)</i>				
10. Number of Communicants at Eastertide – Easter Day to Easter Saturday inclusive including Reserved Sacrament <i>(Note 10)</i>				
11. Number of Communicants on the Sunday next before Advent <i>(Note 11)</i>	Male	Female	Total	
12. Total attendance on the Sunday next before Advent <i>(Note 12)</i>	Male	Female	Total	
13. Total Number of Communion made throughout the year at Celebrations, including those made when Deacons administer at public worship				
14. Total number of Communion made throughout the year with the Reserved Sacrament (excluding public worship)				

Date  Signed .....

(Rector or Priest-in-Charge)

## NOTES

1. This refers to all Baptised adherents of the Anglican Communion.
2. Canon 41.2 defines the Communicants' Roll:  
*In each church the cleric having charge of that congregation shall continuously keep and regularly revise at least annually a list of names and addresses of those members of that congregation who have communicated in that Church during the twelve months preceding, or who for good and sufficient reasons having been unable to do so shall have satisfied the cleric that they have so communicated in the Scottish Episcopal Church or in some Church in full communion therewith.*
3. "Under 6" means children prior to the day of their sixth birthday.
4. "Over 6" means those baptised on or after their sixth birthday.
9. Include **all** celebrations of Holy Communion – Public, Private and House Communions.
10. **Eastertide** means Easter Day and six days thereafter. The figures given should include all Communions made with the Reserved Sacrament.
11. If there is no celebration of Holy Communion on the Sunday next before Advent, the Sunday nearest should be taken instead.
12. Include **all** attendees including children and guests.

# EDINBURGH DIOCESAN SCHEDULE 2016



**NAME OF CHARGE**

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## SECRETARY

Full Name :	
Address :	
Post Code :	
Telephone :	
email :	

## TREASURER

Full Name :	
Address :	
Post Code :	
Telephone :	
email :	

## AUDITOR

Full Name :	
Address :	
Post Code :	
Occupation	

## DIOCESAN SYNOD LAY REPRESENTATIVE - *Elected at AGM*

Full Name :	
Address :	
Post Code :	
Telephone :	
email :	

DIOCESAN SYNOD ALTERNATE LAY REPRESENTATIVE – *Elected at AGM*

Full Name :	
Address :	
Post Code :	
Telephone :	
email :	

PVG CO-ORDINATOR

Full Name :	
Address :	
Post Code :	
Telephone :	
email :	

PROPERTY CONVENER

Full Name :	
Address :	
Post Code :	
Telephone :	
email :	

CHURCH ARCHITECT

Full Name :	
Address :	
Post Code :	

Date of last Review of insurance

Date
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Current levels of insurance cover (including index linking)

Church

£
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Rectory

£
---

Hall

£
---

Other

£
---

Insurance Company

Name
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Is any property listed? YES / NO If so, what category?

Details
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Please give details of any changes of ownership

Details
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Have there been any changes in the Constitution? YES / NO (please specify)

Details
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Date of Congregational AGM

Date
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Were the Annual Accounts presented to, and approved at, the Annual General Meeting

YES  NO

<i>If "no" add comment here:</i>
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I certify that the foregoing information is correct.

Signed ..... Secretary / Treasurer

Date .....

This form should be completed and returned by 31<sup>st</sup> January 2017 to: **The Diocesan Administrator, Diocesan Office, 21A Grosvenor Crescent EDINBURGH EH12 5EL**





**SCOTTISH EPISCOPAL CHURCH  
CONGREGATIONAL SAFEGUARDING CHECKLIST**



*Congregation:*

**SAFEGUARDING POLICIES AND PROCEDURES**

	YES	NO	Details
Are the SEC Policies for Children and Vulnerable Adults displayed prominently in the Church?			
Is the 'Childline' Poster displayed in the Church?			
Does the Church have a PVG Co-ordinator for Children			
Is their name and contact details displayed within the Church and the Church buildings?			
Do they have a copy of the Child Protection Training Booklet?			
Does the Church have a separate PVG Co-ordinator for Vulnerable Adults			
Is their name and contact details displayed within the Church and the Church buildings?			
Do they have a copy of the Protecting Vulnerable Adults Booklet?			
Are the contact details of the Diocesan Protection Officer and the Provincial Officer for the Protection of Children and Vulnerable Adults displayed within the Church?			
Does the Vestry have safeguarding on its agenda at its meetings?			
Is an annual safeguarding report provided to the Vestry at the Church AGM?			
Has the Vestry identified a 'Regulated Work Employer'?			
Has the Vestry compiled a register of 'Regulated Work Positions and 'Positions of Trust' within the Church?			

**SAFE RECRUITMENT AND MANAGEMENT OF VOLUNTEERS/STAFF**

	YES	NO	Details
Who undertakes the recruiting process for regulated work positions and positions of trust within the Church on behalf of the Vestry?			
Are regulated work positions and positions of trust within the Church advertised?			
Are job descriptions available for all volunteer and paid staff posts?			
Are people interviewed for these roles and who undertakes this function?			
Are references taken up for volunteer and paid staff posts?			
Are PVG applications submitted and the approval of the Provincial Officer received <b>BEFORE</b> the person commences regulated work?			
Do all volunteers and paid staff have an identified supervisor to whom they report?			
Have all volunteers and staff undertaking a regulated work role been issued with a pocket card of good practice for children or vulnerable adults?			
Have the volunteers or staff (including the PVG coordinators) received or attended any training?			
Are records maintained for safeguarding training?			

Name of Person Completing this return:

Position in Church:

Date:

# Scottish Episcopal Church Finance Schedule for year ending in 2016

## Diocese of Edinburgh

Charge of \_\_\_\_\_

Year Ending \_\_\_\_\_  
(Please state if accounting period not 12 months)

Please read the accompanying *Quota: a Guide for Charges and Dioceses* for more information regarding Quota and the principles underlying its calculation before completing the schedule.

### A Calculation of Quota Assessable Income (Province)

**1 Total Income from all sources and funds** £ \_\_\_\_\_ **A1**  
(Gross income in the accounting period - as reported to OSCR on Annual Return)

**2 Requested sums to be excluded from Quota Assessable Income**  
Please insert details of sums to be considered as possible exclusions from Quota Assessable Income.  
**For sums to be listed below they must be included in Total Income at A1 above**

<b>a</b> Grants received from Province / diocese	£
1 Stipend support / "augmentation" / travel grant etc	
2 Building grants	£
<b>b</b> Restoration / building project income (not routine repairs)	
1 Grants	£
2 Specific donations / appeals	£
<b>c</b> Insurance Claims	£
<b>d</b> Contribution to shared costs received	£
1 From other charges in Group (eg shared clergy / rectory expenses)	
2 From clergy etc (eg rectory phone expenses etc)	£
<b>e</b> Proceeds (profit) from the sale of fixed assets (property) and investments etc	£
<b>f</b> Legacies ( <i>total of legacies listed at C4</i> )	£
<b>g</b> Reasonable expenses associated with commercial letting or trading income <i>Please provide a schedule of any additional costs incurred in order to earn commercial letting or trading income (such as heat / light / cleaning). This sum should be less than any commercial letting / trading income earned.</i>	£
<b>h</b> Sums collected for and paid to third parties <i>If there have been specific collections in the year for charities or other third parties which are included as both income and expenditure in the accounts please include the income here.</i>	£
<b>i</b> Other requested exclusions <i>If you consider that other categories of income should be excluded please list them separately and attach a written request explaining the nature of the income and why you consider that it should be excluded for your diocese to consider. It would be of assistance if information could also be provided detailing where such sums appear in the accounts.</i>	£

**Total exclusions (sum of A2a to A2i)** £ \_\_\_\_\_ **A2**

**A3 Provincial Quota Assessable Income (A1-A2)** £ \_\_\_\_\_ **A3**

## B Calculation of Quota assessable income (Diocese)

<b>B1</b>	<i>Exemption: Income donated to other registered charities and to recognised overseas mission/projects, up to 10% of total congregation income (details of all donations made to be provided, otherwise no exemption will be allowed). A request for exemption on donations in excess of 10% should be made to the diocese for consideration</i>	_____	<b>B1</b>
<b>B2</b>	<b>Diocesan Quota Assessable Income (A3-B1)</b>	£ _____	<b>B2</b>

## C Congregational giving statistics

*Please provide analysis of congregational giving.*

*All income detailed here should also have been included in A1*

*Income to be included here may have been part of the quota exclusions at A2*

### 1 Regular Congregational giving

<b>a</b>	Pledged (all pledged giving - but excluding tax reclaimed see 3 below)	£ _____	<b>C1a</b>
<b>b</b>	Open Offering	£ _____	<b>C1b</b>
		£ _____	<b>C1</b>

### 2 Other Congregational giving

	Special Appeals / Donations / Fundraising for congregational funds (including Gift Days)	£ _____	<b>C2</b>
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### 3 Tax reclaimed

	Total tax reclaimed on all gifts / donations (in either 1 or 2 above)	£ _____	<b>C3</b>
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### 4 Legacies

Please list all legacies received in year (use continuation sheet if required)

£ \_\_\_\_\_ **C4**

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**Please read the accompanying *Quota: a Guide for Charges and Dioceses* for more information regarding Quota and the principles underlying its calculation before completing the schedule.**

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### Provincial Quota

The Province receives about £720,000 Quota each year - about 30% of its total income. (The bulk of its income being investment income.) In addition to funding the costs of the General Synod Office Provincial Income is used to fund a variety of mission and ministry programmes. A significant element of provincial expenditure is the provision of grants to the dioceses and charges of the Scottish Episcopal Church and the funding of the Scottish Episcopal Institute which is responsible for the training of all those entering authorised ministry within the Scottish Episcopal Church. Further details of provincial income and expenditure is provided in the General Synod Annual Report (the "Blue Book") which is available from the SEC website.

The 2015 Annual Report can be found at:

<http://www.scotland.anglican.org/wp-content/uploads/33rd-Annual-Report-for-the-year-ended-31-December-2015.pdf>

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