

15 May 2019

Dear Colleague

2020 Common Fund – Return of Participant Numbers

Please find enclosed a number of documents relating to 2020 Common Fund assessments, and particularly the Return of Participants for 2019. This letter and attachments have been passed to you by your PCC Secretary (or Churchwarden), as you are the nominated person within the parish for preparing the information for the declared participant numbers. If you are not the correct person for preparing this information, then please discuss the matter with your churchwarden or PCC Secretary as a matter of urgency.

Participant Forms 2019

Please note that this is the only package being sent out in respect of your parish so could you please ensure that the form is completed. The Return of Participants form is to be returned to your Rural Dean (or other nominated contact), completed and signed on behalf of your PCC. You are advised to make a photocopy for retention with your parish records and also to ensure a copy is available in the event of the original form going astray.

The average of the number of participants declared in box 4 of the enclosed form and the corresponding figures on the 2017 and 2018 forms will be used in the calculation of the Common Fund request for 2020 and therefore the form is a very important document which should be agreed by the PCC. Please carefully read the enclosed guidance note "Assessment of Common Fund for 2020" and copy this as required for your PCC members before compiling the figures. Enclosed with this letter is also a document showing the declared number of participants in each parish, by Deanery, from 2011 to 2018. You will therefore be able to see the figures previously declared by your parish, as well as the address for either your Rural Dean or other nominated contact, to whom your participant form should be returned.

The Return of Participants form should be completed and signed by **your priest, two churchwardens and the PCC treasurer on behalf of the PCC**. If there is a vacancy for any of these positions, if appropriate please arrange for another PCC member/s to sign instead. Once the form has been completed and signed, please then send or hand a copy to your Rural Dean (or nominated contact person) by no later than **26th July 2019**. Please note that this deadline has been extended significantly this year to enable parishes who hold their normal PCC meetings in July to review and approve the participant numbers without having to arrange an additional meeting. It is really important to meet this deadline as there is much work to do on the figures before the Common Fund request can be issued in November.

We are once again asking the Deanery to provide a monitoring role in the process by ensuring that all forms are received and reviewed before forwarding them to The Old Deanery. This is an important element in providing confidence in the system so that it can be seen as operating as fairly as possible.

Could I please ask you to work with your Deanery officers, should they contact you asking for the Return of Participants form, or if they request more information on the figures you have provided?

Statistics for Mission – Worshipping Community Data

Back in September we sent out the annual Statistics for Mission forms for completion. It should be noted that the definition of a worshipping community within that form, and the level of detail requested, exactly matches the participation number data that we use in the Common Fund calculation. As in 2018, if the details given in that form were agreed by your PCC, we will be happy to use that number for your allocation and not ask you for a separate submission. Some parishes do appear to have completed their Statistics for Mission forms with this dual function in mind.

Therefore, if you would like us to use the Statistics for Mission data in this way please email Sharon Deacon on accounts.department@exeter.anglican.org and she will then email you, your priest and rural dean affirming the number previously submitted. You will then need to confirm that the number submitted has been agreed by the PCC. However, you are free to choose whether to use the figure previously provided for the worshipping community, or to submit a new (updated) number using the enclosed form.

Late Submissions

We have seen an increasing number of late submissions over the past few years. In 2018, 20% of the participant forms were not received by the deadline and this adds significantly to our workload in having to chase over 100 parishes. We are hoping that the extra three weeks this year will help the process, but we would really appreciate your support in submitting the information in good time. This year, where a participant form has not been received by the Diocesan Finance team by the deadline and the Rural Dean is not aware of the reasons behind any delay, the prior year figure will be used. An email will be sent to the PCC confirming the figure used.

Appeals

There is a deadline of 30th June for all appeals relating to the Common Fund calculation for 2020. Please ensure appeals are sent for the attention of Neil Williams in the Finance Department at The Old Deanery. The Assets Group will make the final decision in respect of those appeals.

We are particularly keen to ensure that the declared participant numbers are correct, so if any errors were made in your previous calculation of the 2017 and 2018 figures, then you should ask us to correct the number for those years. You will have to explain how the error occurred and your letter of appeal will require the signatures of all those who are required to sign the participant form. It should be noted that it is not possible to amend previous years or the current year assessment – any agreed changes in the data used to calculate your Common Fund assessment will be applied to the 2020 calculation.

See the Assessment of Common Fund guidance (Section 1, paragraph 2) about appeals for relief from assessment of income restricted to specified capital projects.

Common Fund Review

As many of you will be aware, we have been reviewing the current Common Fund system and Diocesan Synod will make a final decision on the extent of any changes for 2020 at its meeting scheduled to be held on 15 June 2019. Once the final decision is known we will of course make everyone aware of the changes. However, as things stand, whichever direction is taken, we will

still require the 2019 participant number. One possible change to note when completing the participant form is that the previous cap on needing to have 5 under-graduate students may be removed, so that any number can be included – if this may apply to you, then please read the definition in the enclosed guidance note before completing the form.

Summary

The Common Fund forms an essential part in providing resources for clergy across the Diocese, and also for funding the common life and work of the Diocese at every level. It is essential, therefore, that all parishes engage in this process with an equally open and fair approach.

Timetable

May	Letters/forms sent out to PCC Secretaries for distribution
May/June	PCC assesses the Church Participation figure
26 July	Deadline for PCC to return participant form to the Rural Dean, for Deanery review
July/August	Rural Dean and Lay Chair convene a group to review the forms. Forms are then either passed to the Finance Team at the Old Deanery duly signed off, or in a small number of parishes there may be a need for further discussion with the parish.
23 August	Deadline for Deaneries to return forms to the Old Deanery
August/September	Diocesan Finance Team process the information on the forms
19 October	Diocesan Synod approves the budget
November	Common Fund requests sent to parishes

Yours sincerely



Neil Williams
Director of Finance