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Please contact us if you require any assistance:

Email: Accounts@salisbury.anglican.org

Liz Ashmead – Director of Finance and Asset Management
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Guide issued: 5 April 2022
Overview

Having reviewed the survey results and feedback from parishes (Fairer Share online Survey), Bishop’s Council agreed that we continue with the current system in 2023 with some tweaks and to introduce wider changes or a new system in 2024.

This will help us to:

- **Manage the expectations of change**: changing the fairer share scheme and apportionment to parishes, does not address the fundamental issue that the diocesan budget, which is mainly the cost of ministry provision and support (84%, 2020) is fixed and not very flexible.

- **It is important that ‘Share’ reflects ministry and mission provision**, and with the Bishop Designate arriving later this year (2022) we need to leave space to align the Share system to any changes that might be upcoming

- **We want to provide sufficient time to explore different scheme options** and the impact of these in the next phase of the consultation.

2023 is a transitional year for the new system to be agreed upon and introduced in 2024

Changes for 2023

1. Members will be calculated as average of 2022 count and 2019 average (2017-2019)
2. Modification for ministry will be delinked from the category of affluence but there will still be modification to reflect stipendiary clergy and HfD priests licensed to the benefice
3. All share calculations will be shared with every parish
4. Affluence data will be made available in May to assist parishes with self-assessment
5. The process will use an online submission form to save you time, reduce the chance of errors and offer you a more cost-effective service (See page 9 for the online form)

Your Rural Dean will NOT need to approve your count form, unless in vacancy. Instead, the Diocesan Accounts team will generate and present the consolidated information to your Deanery Review Group and Archdeacon for approval.
Process overview and timetable

5 April

1 to 31 May

2023 DATA COLLECTION FORM

COUNT PERIOD:
1 May to 31 May (5 Sundays)

COMPLETION OF FORM
By hand or electronic

PCC – PRESENT, REVIEW, APPROVE...
...the data collection form at PCC or standing committee meeting. Once approved the incumbent and a church warden signs the form (wet signature or electronically via email) and the form is kept with PCC records for future reference.

By 30 June

ONLINE SUBMISSION
A nominated person of the PCC submits the count and declared affluence category to the Diocesan Accounts team online:
https://forms.office.com/r/XBUSJutsT6

CONSOLIDATION by DIOCESAN ACCOUNTS TEAM
Online submissions are consolidated, and a Deanery Summary spreadsheet provided to each Deanery Review Group and Archdeacon

15 – 31 July

DEANERY AND ARCHDEACON REVIEW
Assess both the fairness and objectivity of the parish returns, liaise with the parishes as appropriate and make any amendments

Rural Dean EMAIL Deanery spreadsheet to Diocesan Accounts team

August

Final consolidation and preparation of calculations and reports for remaining stages of the process

September - October

• Fairer Share Review Group: 2 September
• Diocesan Synod: 24 September
• Deanery Treasurers meeting: TBC
• Issue share letters to parishes: October
Steps: 2023 Fairer Share calculation process

**Step 1**

2022 membership count: 5 Sundays in May (1st to 29th)

- Use the Parish Share count form to complete the parish membership count. This can be done using an existing membership list or using the count form as provided.

A *member* is a person (aged 18 and over, excluding visitors) committed to worship or other regular involvement with the church, and who *may reasonably be expected to contribute* towards the ministry of the church.

- At the top of the Parish Share Form, please select your Deanery, then Benefice and lastly Parish.

- It is important to select this information from the dropdown lists as it will bring up pre-populated details onto the form concerning past membership numbers and self-declared affluence category from 2019.

- Input the parish membership count in Box A (this can be calculated via a membership list or using the count form).

- The form will calculate the average count to be used as part of the 2023 fairer share calculation (average of 2022 count and 2019 average (2017-2019)).

**Step 2**

2022 declared affluence category

- Each parish is asked to categorise their affluence according to the criteria and enter this in Box B on the form.

- Additional affluence data will be made available in May to assist parishes with self-assessment.
<table>
<thead>
<tr>
<th>Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>The members are favourably placed and likely to be more able to pay than most</td>
</tr>
<tr>
<td>B</td>
<td>Whilst not amongst those most favourably placed, the members are generally likely to be better able to pay than most</td>
</tr>
<tr>
<td>C</td>
<td>Whilst not amongst those most favourably placed, the members are generally less likely to be less able to pay than most</td>
</tr>
<tr>
<td>D</td>
<td>The members are mainly amongst those least able to pay</td>
</tr>
<tr>
<td>E</td>
<td>The members are all amongst the least able to pay</td>
</tr>
</tbody>
</table>

Most parishes should fall between B and C.

Only if you consider the ability to pay of your members to be below the average should you choose C. Categories D and E are use in very rare cases.

Step 3 Approval and submission

- The completed form needs to be signed by the incumbent, churchwarden and agreed at a PCC meeting. If in vacancy, please ask the Rural Dean to sign the form.

- Please keep the form as part of the PCC’s records for future reference. DO NOT send a copy of the form to the Diocesan Accounts team.

- Parishes will not be required to seek Rural Dean approval. Instead, the Diocesan Accounts team will generate and present the consolidated information to your Deanery Review Group and Archdeacon for approval. All parishes will therefore use the same format allowing for fair auditing.

- Please submit the parish count and declared affluence using this online form

Consolidation and Deanery Review

- The Diocesan Accounts team will consolidate the count and affluence data as collected via the online submissions for each deanery and provide a Deanery Summary spreadsheet to each Rural Dean, the Archdeacons and Deanery Review Group by 15 July 2022.

- The Deanery Review Group will assess both the fairness and objectivity of the parish returns, liaise with the Archdeacons and parishes as appropriate and make any amendments.

- Having reviewed the outcome with the Archdeacons, the Rural Dean emails the reviewed, amended and approved Deanery spreadsheet to the Diocesan Accounts team at accounts@salisbury.anglican.org by 31 July 2022.

Diocesan consolidation and ministry provision adjustment per benefice

- An adjustment will be made to each parish’s share to reflect the provision of ministry as of 1 September 2022 to the benefice. This comprises the number of stipendiary clergy and house for duty provided to the benefice.

- In previous years the affluence category was adjusted to reflect ministry provision. For 2023 the self-declared affluence category and a different adjustment (details to be confirmed) will be made to consider this provision.

Approval of the Diocesan budget at the 24 September Diocesan Synod

Communication of Share for 2023

Once all calculations have been completed and reviewed, each parish will be informed of their Share request for 2023, ideally by 30 September 2022. All information will be made available in the interests of transparency.
What is Fairer Share and what does it pays for?

Contributions through ‘Fairer Share’ enables God’s ministry and mission in our Diocese; without the generous giving from our parishes, clergy could not be paid and supported.

We received £9.6m in share from parishes
We spent £12.3m on parish ministry and support

See Treasurers Guide to Fairer Share pages 17-18 for detailed Diocesan cost breakdown
The online submission form

Below is an ‘offline view’ of the online submission form that will be used by parishes this year (2022) to submit count and affluence information to the Diocesan Accounts team. **ONLY 1 SUBMISSION PER PARISH**

[link](https://forms.office.com/r/XBUSJutsT6) by 30 June 2022

2023 Fairer Share - Membership Count

The form will take approximately 5 minutes to complete.

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* Required

INFORMATION ABOUT YOU AND YOUR PARISH

Please enter information relating to the person that has been nominated to complete this online Fairer Share count and relative affluence form, on behalf of the PCC. **Only 1 submission per parish**

1. Your Name and Surname *

2. Your PCC Post / Position *

3. Your Email address *

4. Fairer Share Parish Code
(Your code can be found at the top of the 2023 count form e.g., PO11LO.)
MEMBERSHIP COUNT

Please enter the membership count as conducted during the period 1 - 31 May 2022 that has been agreed in accordance with the guidelines set out in the instructions. 2023 membership count will be calculated as the average of:

- 3-year rolling average prior to the pandemic (2017-2019) and
- 2022 count

(Please enter **numbers only**) *

Please enter a number greater than 0

DECLARED AFFLUENCE CATEGORY

Please enter the relative ability of your Church’s members to pay share (A to E) that has been agreed in accordance with the guidelines set out in the instructions.

- [ ] A
- [ ] B
- [ ] C
- [ ] D
- [ ] E

FURTHER INFORMATION AND DECLARATION

1. This comment box is for any other information the parish would like to include that may assist the Deanery in assessing the submission from your parish

[Blank]

Declaration

By submitting this online form on behalf of my parish, I confirm that:

- I have the authority to submit the response on behalf of the parish
- this submission is a true and accurate statement of church membership and ability to pay share of the parish, in accordance with the scheme guidelines and instructions
- the information submitted, has been approved at a PCC and / or PCC standing committee meeting, signed by the church warden and incumbent, and
- **we will retain evidence of agreement, locally**