



PARISH REFERENCE MANUAL

Introduction

This reference manual has been developed by members of diocesan staff in Church House, with a small working group of rural deans, lay chairs and churchwardens. It has been prepared in response to the most frequent questions we have received over the years.

It attempts to provide information on both legal requirements and good practice in one place. Web-links are provided to take you to more detail.

We hope it will particularly assist clergy and churchwardens, especially as they prepare for their triennial Archdeacons' visitations.

This manual, along with other information, can also be found on the diocesan web-site at:

<http://www.salisbury.anglican.org/parishes/churchwardens>

If you have any questions the diocesan team at Church House is here to help. Please contact us at Church House on 01722 411922.

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SUMMARY OF USEFUL DOCUMENTS TO HOLD

We recommend that these are kept together for easy reference and updating.

- Latest parish profile.
- List of registers currently in use and date of first entry.
- The last Quinquennial Inspection Report including name of Inspecting Architect.
- List of all actions taken on the recommendations following the last Quinquennial Inspection Report.
- PCC budget for the current year (in numerical or narrative format).
- Annual Report and independently examined/audited Accounts for the previous year.
- List of Trusts (parochial, educational and fabric, as well as ecclesiastical) of which PCC members and/or the Incumbent and/or Churchwardens are *ex officio* trustees. Please detail any restrictions on their use.
- List of names and addresses of any other Christian bodies using the church for worship.
- Any policy the PCC has for who may use the hall(s) or church and when.
- List of ministers, licenced lay workers, LPAs, licenced lay worshippers, PCC officers.
- List of any people employed by the PCC or associated trusts.
- List of any people working in a voluntary capacity.
- List of people approved by the PCC and authorised by the Bishop to administer Holy Communion.
- List of all current policies approved by the PCC.

A more extensive check-list of information and actions follows. Some of this information may be held at benefice rather than parish level:

1. Registers

- a. Register: Service, Baptism, Confirmation, Banns, Marriage, Burials and of those admitted to Holy Communion before Confirmation.
- b. List of registers deposited with Wiltshire & Swindon, Dorset or Hampshire Historic Records Office.

2. Minutes and Plans

- a. PCC/APCM Minute Books/Files.
- b. Churchyard plans, including record of interments (where applicable). This should also include reserved spaces in closed churchyards where applicable.

3. Property and Inventory

- a. Terrier including list of parish owned properties (Reminder: ensure DBF is custodian trustee in every case) and parish trust funds.
- b. Leases and licences of all properties owned by the PCC or parish trust funds and let out.
- c. Inventory.
- d. Photographs of silver and valuables.
- e. Receipts for any items stored or deposited or displayed away from the church.

Information and links to other web-sites is available at:

<http://www.buildingconservation.com/articles/churchwarden/churchwarden.htm>

4. Maintenance

- a. Log Book detailing any work completed on the church.
- b. Details of all servicing contracts for things such as heating, electrics, lightning conductors and fire extinguishers.
- c. What is the heating system for the church and church hall?
 - i. If gas, is there a Gas Save certificate?
 - ii. If oil, are there any bulk buying schemes? Are there any special security arrangements for the oil storage?
- d. Is there a septic tank? Are there any issues with private drainage servicing of this?
- e. Do you hold a copy of the last Quinquennial Report?
 - i. Is there a list of all actions taken on the recommendations following this?
- f. Are there records of faculties granted in the last three years and copies of certificates that work was satisfactorily carried out?
- g. Has any provision been made for people with disabilities, including a loop system?

5. Insurance

- a. All insurance policies.
- b. The PCC's Health & Safety policy.
- c. Is the church and church hall insured to full replacement value?
- d. Has all metal on roofs and downpipes been treated with Smartwater?

See:

<http://www.ecclesiastical.com/churchmatters/churchguidance/churchsecurity/smartwater/index.aspx>

- e. The following link takes you to Ecclesiastical Insurance guidance on health and safety, risk assessment and fire risk assessment:
<http://www.ecclesiastical.com/churchmatters/churchguidance/index.aspx>

6. Risk Assessment

- a. Has a risk assessment been undertaken on the church hall and all other premises controlled by the PCC? When was it last reviewed?
- b. Does the PCC ensure that a risk assessment is carried out for all activities undertaken under the auspices of the church, as required by insurers?
- c. Is there an up to date Accident Book?
- d. Have you carried out a fire assessment?

7. PCC Finances

- a. A copy of the latest examined or audited Annual Accounts and Annual Trustee Report. Guidance on Reports and Accounts can be found at: <http://www.salisbury.anglican.org/resources-library/parishes/finance/pcc-report-and-accounts-an-introductory-guide-feb-2017>
- b. Have two copies of the Annual Accounts and the Annual Trustee report been sent to the Deanery Treasurer?
- c. Does the PCC need to do an annual return to the Charity Commission and if so has it been done?
- d. A copy of the actual expenditure and income versus the budget accounts for the current year, as presented at the last PCC meeting.
- e. Risk assessment/Risk Register.
- f. Treasurer's Account Books or an explanation of electronic procedures in use and, if possible, an up-to-date print-out.
- g. Invoice files, income records and other notes.
- h. A brief statement of the procedures for dealing with cash and cheque income.
- i. A copy of the most recently submitted statutory fees remittance to the Diocese. Guidance on fees can be found here: <http://www.salisbury.anglican.org/parishes/finance/statutory-fees>
- j. Keep a record of the Independent Examiner or Auditor (name and address). It is helpful if he/she meets with the PCC once every 2/3 years.
- k. Trustees need to be aware of any loans or liabilities that they are responsible for as well as how Share payment is going.
 - i. Is the Share paid by direct debit? Or by monthly Standing Order? (Note: Check what arrangements you have in your parish for paying Share).
 - ii. Does the PCC have any loans? If so, are the payments up to date?
- l. PCCs find it useful to have written reports from the treasurer quarterly or twice a year.

8. Safeguarding

A comprehensive range of parish resources regarding safeguarding, including examples of safeguarding policies, is available on the diocesan web site at:

<http://www.salisbury.anglican.org/resources-library/parishes/safeguarding1/parish-resources>

- a. A copy of the PCC's Safeguarding Policy and action plan for responding to incidents.
The Diocese of Salisbury has adopted, and strongly recommends each parish to adopt, the new national policy 'Promoting a Safer Church.' This must be done in conjunction with the Safer Recruitment Practice Guidance. These documents can be found on the website www.salisbury.anglican.org under the heading 'Safeguarding' then 'National Policies.'
- b. Has the PCC discussed, adopted and promoted its Safeguarding Policy? When was it last reviewed?(It should be reviewed annually).
- c. Please record the name of the PCC's Parish Safeguarding Representative (PSR) and ensure their photograph and contact details are displayed on a noticeboard. If the PSR does not want their personal contact details to be made public, then we recommend that the PCC purchases a basic pay-as-you go phone that they check for messages two or three times a week.
- d. Keep a list of a list of those for whom the PCC has requested DBS clearance.
- e. Keep a list of all those who have completed safeguarding training including the date and title of the course. Please note C0 (the module appropriate for PCC members) is now available online.
- f. Who is the PCC's Verifier within the benefice? If you do not have one, please contact Church House on 01722 438651 and inform Mr Adrian Smale.
- g. Ensure all those offered posts involving responsibility for children or adults at risk of abuse that meet the eligibility criteria have been required to obtain a DBS disclosure.
- h. The PCC's log sheets for DBS disclosures.

9. Data Protection

Guidance and resources to help parishes comply with the General Data Protection Regulation (GDPR) are on the [parishresources.org](http://www.parishresources.org) web site at <http://www.parishresources.org.uk/gdpr/>.

Detailed information on what documents to hold and for how long can be found in "Keep or Bin...? the Care of Your Parish Records", which is available at: <https://www.churchofengland.org/more/libraries-and-archives/records-management-guides>

10. Employees and Volunteers

Guidance about employing people is available on the parishresources.org web site at: <http://www.pariahresources.org.uk/people/employing-staff/>

- a. Do all people employed by the PCC or associated trusts have job descriptions, letters of appointment and contracts?
- b. Is there a pension scheme available for employees to join? Information on the National Employment Savings Trust (NEST) and guidelines can be found here:
<http://www.nestpensions.org.uk/schemeweb/NestWeb/public/home/contents/homepage.html>.
- c. Please check if an employee of the PCC is also a member of that body. This should not normally be the case and authorisation from the Charity Commission is usually required <https://www.gov.uk/guidance/payments-to-charity-trustees-what-the-rules-are>
- d. Please attach a copy of the PCC's Safer Recruitment Policy (if appropriate).
- e. Have references been taken up on all staff and volunteers? See "Request for Reference" under the Recruitment heading here:
<http://www.salisbury.anglican.org/resources-library/parishes/safeguarding1/parish-resources>.
- f. Has the legal status of all employees been checked, including seeing documentary evidence, to verify that they are entitled to work in the United Kingdom (to ensure compliance with the Immigration, Asylum and Nationality Act 2006)?
- g. Does any self-employed person or persons who are registered as limited companies work for the PCC on a regular basis?
- h. On what basis does the Organist or Musical Director work for the PCC?
- i. Do you have any other roles where ad hoc payments are made?

11. Use of Church and Church Hall

- a. Copies of licences granted by the PCC for use of any part of the church or hall.
- b. Hire agreement forms for occasional use of the church or hall.
A Model Hiring Agreement for a Church Hall/Centre can be found at the following link:
<http://www.salisbury.anglican.org/resources-library/parishes/safeguarding1/parish-resources>
- c. Please give due date for renewal of licences under Faculty or letters of agreement for church and hall users.
- d. Have they been required to undertake a risk assessment on their activities?
- e. Please list the bodies or organisations that regularly use the church hall(s) or other premises belonging to the PCC.

- f. Have all those people with keys to the church/church hall been asked to sign a keyholder agreement?

12. Copyright

- a. The PCC is required to undertake a CCLI Church Copyright Healthcheck.
- b. This will help you to ensure that you comply with copyright law.
- c. The Healthcheck can be completed on-line at <https://uk.ccli.com/church-healthcheck/>

13. Administering Holy Communion

Have all people who administer Holy Communion been approved by the incumbent or authorised by the Bishop? For guidelines and pro-forma see the 2015 regulations at:

<http://www.salisbury.anglican.org/resources-library/parishes/cypaf/children-and-communion/2015-regulations>

OTHER USEFUL RESOURCES

The Diocesan web-site, <http://www.salisbury.anglican.org> and national web-sites such as <http://www.churchcare.co.uk/churches> and <http://www.parishresources.org.uk> and have a wealth of useful information.

There are also various publications:

(S) = of particular interest to PCC Secretaries

(T) = of particular interest to PCC Treasurers

Church Representation Rules 2011 (S) which is also available online at: <https://www.churchofengland.org/about-us/structure/churchlawlegis/church-representation-rules/church-representation-rules-online.aspx>

Practical Church Management 2014 (S/T)

The Charities Act 2011 & the PCC (PCC Accountability) (T)

A Handbook for Churchwardens and PCCs

All are available from Sarum College Bookshop (19 The Close, Salisbury, Wiltshire SP1 2EE

Phone: 01722 424800). The first three are also available at a discount to those attending PCC officer training sessions arranged by the Diocesan Office.