

To: Church Committee

DIOCESE OF KOOTENAY
201 – 380 Leathead Rd
Kelowna, BC V1X 2H8

GENERAL INSTRUCTION GUIDE for
ANNUAL STATISTICAL REPORTS
to be returned by **February 28, 2012**

The Annual Statistical Reports are on the Diocese of Kootenay Website <http://www.kootenayanglican.ca/> located in Resources → Diocesan Forms → Annual Reports.

There are a number of sheets, arranged in general topical headings so that the Incumbent, Wardens and Treasurer can work on the reports. Please print and complete the reports that are relative to your sphere of responsibility and forward the others, including an Instruction Guide, as applicable. If assistance is required with any of the reports, call Bonnie at the Diocesan Centre 778-478-8310 Ext 204.

It is important that all of these reports be completed as thoroughly and accurately as possible and returned on time. Please include all email addresses.

Please complete your reports in BLACK TYPE or PEN.

PLEASE SUPPLY THE DATA IN THE CATEGORIES GIVEN. The information must be collated in the categories for reporting to General Synod and various Diocesan summaries. Do not change categories to suit individual situations.

Please return the CERTIFICATE OF ELECTION and DIRECTORY OF OFFICERS immediately after your Annual Meeting and distribute the rest of the forms for completion and return by **February 28, 2012**. Please also include a copy of your AGM Report.

Wardens and Treasurers: The Warden's Handbook and Treasurer's Handbook can be found on the Kootenay website www.kootenayanglican.ca → Resources . Please pass on all pertinent resources to your successor.

Multi-Point Parishes: Each point that keeps its own financial books will report separately and the Central Treasurer will report all income and expenses that cover common costs of the parish. The reports will be forwarded directly to the Synod Office for collating.

Shared Ministry Parishes: I believe all of Kootenay's Shared Parishes are now working with a 50/50 split for both income and expenses. If you have a single or combined financial operation that is not using 50/50, please report on a pro-rata basis using the % of Anglican membership as determined from your parish records, if such a percentage cannot otherwise be determined. e.g. If the Church raises \$20,000 for all purposes, and the congregation or parish has 45% on Anglican rolls and 55% of its members on United Church rolls, then we suggest that you use these same percentages on the Anglican and United Church annual reports.

Six Reports are to be completed and returned by February 28, 2012 by either mail or fax (778-478-8314); these reports are outlined on Page 2.

A. DIRECTORY OF OFFICERS

This form provides the Synod Office and Regional Deans with a directory of the key Officers & other information about your parish and is used throughout the year. Please complete it as carefully as possible including postal codes, telephone and fax numbers, and E-Mail addresses where applicable, and using Christian names rather than initials. Forward one copy to your Regional Dean and return one copy to the Synod Office. Please advise the Synod Office of any changes which may occur during the year.

B. CERTIFICATE OF ELECTION (**Important - Return the day after the election**)

Note that you are asked for the number of ELECTORS on the rolls of membership of the congregation. There may be many persons who have signed the Declaration of Electors and are thus included on the rolls who may not be present at the Annual meeting. Parishioners who are able to meet the requirements would be asked to sign such a declaration during the course of the year, and not just at an Annual General Meeting! Only those who have so signed are to be counted, however, and that is part of the solemn statement of the Certificate. By neglecting to provide opportunity for people to sign, the parish may be prevented from having the number of Synod delegates to which it is entitled. The number who thus qualifies as of the date of the election is entered. This information will be used for the next Diocesan Synod.

C. STATEMENT OF INCOME AND EXPENDITURES

To be completed by each congregation and in the case of Multi-Point Parishes, the Central Treasurer will also complete a report for funds that cover common costs. This information is copied directly from your audited financial statements and the income and expense totals must be equal to those on your Audited Financial Statements. The report information is used to collate the Diocesan Parish Income and Expenditures for General Synod, and the 'Total Operating Income' is used as a base to determine both your parish/congregation D.F.B. assessment and Clergy Stipend Midpoint. Please refer to your Treasurer's Handbook File #3.3 for further instruction on completion of this form.



A copy of your **FULL CHURCH FINANCIAL STATEMENT**, including Balance Sheet, signed by your auditor (or reviewer) must be attached with each congregation report.

D. CASH STATEMENT

To be completed by each congregation. This information is copied directly from your audited financial statements Balance Sheet. Please note that the two sides may not balance as there may be other information included on your Balance Sheet that is not required on this report. This report can also be a very useful tool for reporting at your Annual General Meeting.

E. PROPERTY STATISTICS

Under kindergartens also include operating Day-Care Centre, Play Schools and use by School Boards for regular classroom space. A Thrift Shop column has been included this year. This information must be accurate to assure proper coverage under Diocesan Liability insurance covering all buildings in the Diocese. Current and Long-term debt columns are for General Synod purposes.

F. PARISH STATISTICS

To provide various information from church records for Diocesan and National statistics. Two new categories have been included under 'Population' – Pentecost and Christmas Eve/Day services. FYI, these statistics will be used by the National Church to determine our diocese's number of eligible delegates for General Synod.

Please ensure all applicable line data is completed accurately.

Remember to make a copy of the completed reports for your church file.