Deanery Financial Adviser (DFA) Role Description

Context

The Diocese of York covers the area between the River Tees to the Humber, and from the A1 to the Yorkshire Coast. It is made up of 21 deaneries arranged into 3 archdeaconries. There are 600 churches and 125 schools and academies in 470 parishes in the Diocese of York which all share a vision of generous churches, making and nurturing disciples, growing and working together underpinned by the strategic goals of Reaching, Growing and Sustaining.

The Purpose of the Role

- To support the parishes in the Diocese of York in managing their finances and facilitating the role of money as an instrument for mission.
- To act as a bridge between parish, deanery and diocese.

Primary Responsibilities

- Take an active role within the Deanery Leadership Team working closely with the Archdeacon
- Support the Diocesan vision of generous churches, making and nurturing disciples, by developing sustainable finances, whilst working closely with colleagues in the Deanery.
- Support parishes in their dealings with the Diocese and disseminate information as appropriate on the finances of the Diocese and the National Church
- Provide help, support and guidance to Church Council finance officers in the deanery (individually and collectively)
- Offer general advice, guidance and support to parishes on any matters relating to Church Finance

Key Tasks

General

a) To provide help, support and guidance on:
   i. the making of appropriate Freewill Offers
   ii. the promotion of standing orders
   iii. the understanding of cash flows
   iv. financial decision making and best practice for PCCs including fund accounting
   v. Gift Aid and the Gift Aid Small Donations Scheme (qualifying donations, Gift Aid declarations and claims to HMRC, including Charities Online)
   vi. Compliance with legislation e.g. Charity Commission registration

b) To monitor contributions to the Diocesan Common Fund against pledged Freewill Offers with a view to supporting parishes in meeting their offer

c) To help parishes address any concerns identified by the Diocesan Finance team

d) To attend Deanery Synod meetings and present up to date financial information (where appropriate)

e) To hold regular meetings, as appropriate, with parish finance officers

f) To be a point of contact for technical aspects of church finances such as year-end account examination, payroll etc.

Annual Returns

g) To provide help, support and guidance on the various annual returns that the parishes need to submit including:

   i. **Annual report and accounts** at aggregated PCC level (Legal requirement under the Charities Act). These should include the following 4 sections and all need to comply with the Statement of Recommended Practice (SORP) for charities:
      - Trustees report
      - Receipts and payments or SOFA and related notes
      - Statements of assets & liabilities or Balance sheet and related notes
      - Independent examination or audit by an appropriately qualified person

   ii. **Annual budget**

   iii. **Return of Parish** finances (requirement of the Church of England). To support PCC Treasurers with the preparation and submission of the online annual Return of Parish Finance and review returns which have been submitted, highlighting any anomalies to the PCC Treasurer and Diocesan Finance Team as appropriate – this will include encouraging parishes in the use of the web based parish returns system.

   iv. (Note that there is also an annual **Statistics for mission** return required by the Church of England but that this is not a financial report)

Key Relationships

Primary Contacts

- Archdeacon
- Area Dean and Lay Dean and other members of the Deanery Leadership Team
- Representatives from PCCs within the Deanery; including Treasurers, Gift Aid Secretaries and Parish Giving Officers
- Generous Giving Team
- Finance Team at Diocesan House
- Deanery Synod members

Other contacts

- DFA peer group (in archdeaconry and across Diocese)
- Chairman of the Diocesan Board of Finance and its members
- Archdeacon for Generous Giving and Stewardship

Commitment

There is a certain time commitment that goes with the role of DFA. This will include:

- Regular meetings with the Archdeacon and their fellow DFAs
- Meetings of the Deanery Leadership Team
- Deanery Synod meetings
- Attending training events as appropriate
- Supporting parishes by phone, email or meetings

The Diocesan Board of Finance (DBF) is grateful to all DFAs for the time, energy and commitment that they devote to this important ministry.

Terms of Appointment

The role of Deanery Finance Adviser (DFA) is a voluntary role. The appointment is made by the Archdeacon following a selection process that is led by the Area Dean and Lay Dean. The term of office, which may be renewed after consultation, is normally for five years. The DFA will be a member of Deanery Synod and the Deanery Leadership Team.

Person Specification

Essential

DFAs need to have strong and empathetic communication skills and a good understanding of the financial principles that are applicable to parish finances. They should be committed to the Christian principles of Stewardship and Giving and be willing to work with the Generous Giving Team to assist PCCs and DCCs. DFAs do not need to be accountants, but do need to be numerate. As IT plays an increasingly large part in the role of PCC Treasurer, DFAs will need to be computer literate so that they can support church finance officers in maintaining their records and preparing and submitting their Annual Returns.

Desirable

It is helpful, but not essential, for DFAs to have first-hand experience of the role of a PCC Treasurer (i.e. to be or have been a PCC Treasurer).