

Deanery Financial Adviser Role Description

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 and the Deanery Financial Partnerships, working closely with the Archdeacon
- Develop the vision of generous churches, making and nurturing disciples, whilst working closely with colleagues in the Deanery Financial Partnership
- Advocate for 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 Parochial Church Council Treasurers in the deanery (individually and collectively)
- Offer general advice, guidance and support to parishes on any matters relating to Church Finance

Key Tasks

- a) To provide help, support and guidance on:
 - the making of appropriate free will offerings
 - the promotion of standing orders
 - the preparation of annual budgets
 - the understanding of cash flows
 - financial decision making and best practice for PCCs - including the preparation of annual accounts which comply with the Statement of Recommended Practice (SORP) for charities
 - Gift Aid and the Gift Aid Small Donations Scheme (qualifying donations, Gift Aid declarations and claims to HMRC, including Charities Online)
- b) To monitor contributions to the Diocesan Common Fund – against pledged free will offerings with a view to supporting parishes in meeting their pledges
- c) To help parishes address any concerns identified by the Diocesan Finance team
- d) To support PCC Treasurers on an ad hoc basis with the preparation and submission of the 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 filing system
- e) To support parishes in their fundraising and stewardship activities
- f) To attend Deanery Synod meetings and present up to date financial information

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
- Deanery Synod members

Other contacts

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

Commitment

The role of Deanery Finance Adviser (DFA) is a voluntary role but there will be a certain time commitment. This will include:

- Regular meetings with the Archdeacon, Deanery Financial Partnerships and their fellow DFAs
- Meetings of the Deanery Leadership Team
- Deanery Synod meetings
- Attending training events as appropriate

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 appointment is made by the Archdeacon following a selection process that is led by the Area and Lay Dean. The term of office, which may be renewed after consultation, is normally for five years. The DFA will be an member of Deanery Leadership Team and, if not already elected, co-opted on to the Deanery Synod.

Person Specification

Essential

DFAs all 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 and able to discuss these with PCCs. 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 a basic level of computer literacy so that they can support Treasurers 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).