

Dollars & Sense

News for Church Treasurers and Financial People

September 2012 Newsletter from Financial Services, UCA Presbytery and Synod of SA



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*Deputy General Manager,
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Dear Friends

Gratitude. As the father of three young children I know the importance of training them in the value of saying 'thank you', especially since, in comparison to so many others in the world we are incredibly blessed, both materially and socially.

Gratitude is an attitude which our heavenly father encourages. For example, the gospels tell us that out of a group of lepers who were healed, only one returned to Jesus to say thanks. Paul reminds us in Thessalonians to be thankful in every circumstance.

So it is with sincere gratitude, that we too would like to give thanks, not just to God but also to the congregational and 'parish' leadership which makes so much possible. Thank you for your Mission and Service contributions - we know that this comes at a cost. Thank you for sending in audited copies of your congregational (and 'parish') 2011 financial statements which help us as we look ahead and plan for the future. Thank you for keeping our Payroll Bureau updated with leave and other forms, which helps them provide an up to date and efficient service. Also and above all, thank you for your dedicated service to the people of God in your local church community.

Finally, it was great to see and meet so many Treasurers who took advantage of the recent Treasurers' workshop. I wish to thank those members of our team who helped prepare and deliver the workshop. Please look out for our next workshop – hopefully we will see you there.

Regards,
Peter Battersby



Meeting the team - Kathryn Bennett

Kathryn, a Payroll Administrator, is one half of the Financial Services Team's Payroll Bureau. Together with Yvette de Reuver she helps manage the payroll for about 450 personnel, providing a valuable service for the Presbytery & Synod. Many congregations have found it easier to let Kathryn and Yvette process their payroll as they provide a friendly, efficient and cost-effective service which reduces the pressure on many of our volunteer Treasurers. Kathryn has about 40 years of experience in payroll, working mainly in the retail sector, although she also worked for a few years with a labour hire company.

Kathryn is a fabulous cook and from time to time will grace us with some of her magnificent baking. Aside from her love of cooking she is also a passionate gardener. She has colourful flower beds, a herb garden just outside her kitchen and enjoys the fresh produce from her citrus and cherry trees.

Kathryn, her husband (Chris) and their Siamese cat (Thomas) form a family unit, a family which is shortly about to expand as her son is getting married in October. Kathryn also has a daughter who is engaged.





Uniting College



A few weeks ago a young couple came to see me [Steve Taylor, Principal, Uniting College for Leadership & Theology], armed with questions about ministry in the Uniting Church. With their permission, this is some of their story.

She was born in rural Australia and moved to Adelaide to study. In 2008, as part of her degree, she did a placement in Port Augusta. She felt a stirring, a sense that she might return one day. She returned to Adelaide to continue her study. She met and married a trained youth worker.

After university study, they found employment in community ministry here in Adelaide. Together they sensed God's call to the marginalised and poor. In order to explore this call they moved to work with Urban Neighbours of Hope (UNOH) in Sydney. They loved the values of UNOH, of Incarnational work in partnership with the lost and the least. But they still remained restless, sensing their call was not urban, but to regional South Australia.

They moved to Port Augusta, he to community youth work, she to volunteering at the aged care home in Davenport, plus paid a few days a week as part of the Aboriginal education team in the school. They found the most run down suburb and moved in. They find themselves linking with the Uniting Church, one week with Congress, the other week with Port Augusta Uniting Church.

In the Uniting Church they heard about the ministry of Deacon. Hence their visit to see me. They want to be in Port Augusta for the next 15 years, to embrace a ministry of Incarnational community development. How can their sense of call be realised in the ministries of the Uniting Church?

The Uniting Church's understanding of ministry is that we are all called to ministry. The Basis of Union says 'The Uniting Church affirms one Spirit has endowed the members of his church with a diversity of gifts, and that there is no gift without its corresponding service: all ministries have a part in the ministry of Christ.'

The Uniting College is about developing effective leaders of healthy, missional churches who are passionate, Christ-centred, highly skilled, mission oriented practitioners. That is you and that is me and that is our friends in Port Augusta seeking to discern their gifts and calling with the Uniting Church.

Bequests

It is a growth industry. Charities and organisations everywhere are asking people to remember their cause in their will. Speaking at a recent conference in another denomination this was confirmed by an ordained member of that church who said, 'We just decided to mention it in our church bulletin and we are amazed at the positive response. It seems all the charities are doing the marketing of the idea of a bequest and all we had to do was suggest that our church was an option.'

People want their giving to last beyond themselves and in planning their wills may wish to leave a legacy for their church. The church sometimes misses out on these gifts as people may not be aware of how to remember their church in their wills or simply because the church does not ask people to consider giving.

Local churches which invite bequests will find people are more confident in their giving when there is a clear understanding surrounding:

- ★ Use of capital and interest earned – is the fund to be perpetual?
- ★ Investment of funds – outline preference of how funds are invested before being expended
- ★ Describe major purposes for which the church is seeking enduring funds – maybe it is for a particular ministry or mission focus, staffing a particular ministry or outreach or property needs.

There are three ways people can leave a bequest to the Uniting Church

1. Leave a bequest to the Uniting Foundation.
2. Leave a bequest directly to a congregation; for any purpose or for a particular area of its work.
3. Leave a bequest to a particular part of the Uniting Church.

To comply with the state Act which inaugurated the Uniting Church in South Australia, all bequests to congregations must be left to The Uniting Church in Australia Property Trust (S.A.) who will then forward the gift as described in the will. It is wise to check with your accountant or lawyer and download the resources available on the Uniting Church SA website, go to Business Administration/Finance/Spirited Generosity tab or resources.sa.uca.org.au/finance/stewardship or call Lynne Aird in the Synod office.





Treasurers

Audited financial statements

If you are a new Treasurer you might not be aware that some time ago the Presbytery & Synod of SA, meeting in full session, voted that all congregations and parishes should forward copies of their audited financial statements to the Synod office by the 30th of June of each year. So far, 73% of 2011 audited financial statements have been received, for which we are grateful. Thank you for sending these in to our office. If you have not yet sent your congregational or 'parish' financial statements in yet, please forward these to us, or let us know if they may be delayed. Please ring Peter Harbison on (08) 8236 4270 or email finance@sa.uca.org.au

Unclaimed monies

Recently the Synod office was contacted by a congregation which had been approached by a company offering to retrieve unclaimed moneys on its behalf. Please note that this information is available for free via the internet. Simply open your internet browser and key in <https://www.moneysmart.gov.au> and then click on 'Unclaimed money' followed by 'Search for money'. A new tab might open up. Key in 'Uniting Church' to see if your church is listed. (While you're at it, you might also want to conduct a search under your own name or surname!) Contact our office if you need help claiming any church monies. Once you've done that, check out the MoneySmart home page for useful financial tips.

DATES & REMINDERS - Lent Event

Information about Lent Event can be obtained from <http://www.lentevent.com> If you are yet to forward a cheque for your congregation's contributions, please note that ALL cheques should be posted to: **Lent Event, PO Box A2266, Sydney South NSW 1235.**

Treasurers workshops

On 25 July 2012 we held a workshop for Treasurers concerning 'Finance Administration'. The workshop was fully booked and was well received by the 22 Treasurers who came to the Synod Office to participate. A further 21 information packages were sent out to Treasurers who were either unavailable to attend on the day, or missed out on securing a booking due to limited space. Synod staff from the Finance, UC Invest, Human Resources and Synergy areas presented information and were available to answer questions.

Some feedback received from the attendees:

'Thank you so much again for an extremely helpful opportunity to share and meet with other Treasurers. This is so important to be briefed and understand what needs to be achieved in the Treasurer role.'

'The session proved to be a useful reminder of things I should have done'

'You have answered most of my questions today. It is always helpful to have information reinforced and refreshed'

'Please do it again next year. Thanks!'

We plan to present the next workshop in October. The topic will be 'GST Compliance'. Keep an eye on your inbox for further details closer to the time.

Differences between an employee (paid personnel) and a volunteer

Treasurers are encouraged to familiarise themselves with the Synod's 'Guidelines for Recruitment and Selection of Lay Personnel Employed in Congregations'. This is important in order to avoid possible legal and/or insurance complications. While the entire document can be viewed at <http://resources.sa.uca.org.au/human-resources/congregational-resources/guidelines-for-recruitment.html> the following extracts are worth reading.

- ★ An employee must have a Position Description / Person Specification, whereas it is highly desirable (but not mandatory) that a volunteer has at least a summary set of duties.
- ★ The hours of attendance of an employee are to be determined as part of the employment contract, whereas the actual hours of attendance of the volunteer is totally at their discretion.
- ★ No financial or 'in kind' support to the financial benefit of the person concerned takes place between a congregation and a volunteer except where a volunteer is due for reimbursement of 'out of pocket' expenses.
- ★ The employee is covered by WorkCover for workplace injuries whereas the volunteer is covered by the volunteer component of the Church's insurance policy.
- ★ A Church Council or a member of a congregation should provide appropriate supervision to volunteers at all times. Preferably, the Church Council has knowledge of this supervision role. This ensures that the volunteer is adequately covered by the Church's volunteer insurance cover. However the term 'supervision of a volunteer' only implies the ability to 'request' not to 'direct' a volunteer.
- ★ It is an important distinction between an employee and a volunteer that a volunteer always has the option to refuse to undertake the work requested by a supervisor. However, the volunteer cannot undertake tasks that have not been approved by a supervisor.

For more information about the conditions of engaging volunteers, **please refer to the Volunteers Protection Act 2001** <http://www.legislation.sa.gov.au/LZ/C/A/VOLUNTEERS%20PROTECTION%20ACT%202001.aspx>



OHS&W Checklists

Has your congregation ever conducted an occupational health and safety review of its facilities? Is this diarised as part of a regular routine? If your church is holding a working bee, do you think through the safety implications?

The Uniting Church SA Property Department's web page has sound advice for congregational working bees. Just go to the Uniting Church SA web site, select 'Business and Administration' on the grey horizontal bar and then select 'Property Services'.

Preparing for Bushfire Seasons

If your church is located in an area which is prone to bushfires you might want to check out the Property Services section of the Uniting Church SA web site. This includes a link to the CFS which has a number of useful fact sheets.



Copyright Lessons

A congregation's \$10,000 lesson: copyright and your congregation's web site.

The Queensland Synod reports that a legal case cost one congregation \$10,000 in legal fees and damages because a congregational webmaster copied and posted online, without permission, a literary work which had been seen in an unrelated organisation's newsletter. (For more details go to: http://www.faps.ucaqld.com.au/copyright_art1.html

We recommend that congregations go to the Australian Copyright Council's web site and read their guide regarding copyright infringements and business web sites. It is not always obvious if pictures and articles which are readily available on the web are copyright protected, especially if you are copying from someone who copied from someone who copied etc. Their unauthorised use could provoke legal and financial consequences. For the article go to: <http://www.copyright.org.au/news-and-policy/details/id/1985>

We are also advised that they have many fact sheets which are useful for congregations.

Given that some congregations produce their own monthly or quarterly magazines with articles, stories and poetry, we would also recommend caution in copying material from other sources, without the necessary approvals, for these publications.



New look Uniting Church SA web site

Recently the Uniting Church SA's web site home page was re-vamped. This new site is designed to be more intuitive, although inevitably it will take a little bit of getting used to. Links to pages for Finance, Stipends and the Mission & Service Fund can be accessed via the 'Business and Administration' option in the grey horizontal bar at the top of the page. Current and previous issues of Dollars and Sense can be seen by selecting 'News' in the grey horizontal bar. If you wish to download or print a copy of the current issue from a pdf document simply go to Current Issue Download and the red link, which are immediately below the expandable and easy-to-read version (which is the dominant visual item on this page).

Also, if you are looking for links to other UCA web sites (such as the national site to view regulations), select 'Who we are'.

TIP: Having selected a heading in the grey horizontal bar, move the cursor down vertically (rather than diagonally) so that it is level with the option you wish to select and then move the cursor horizontally to select it.

21st century communications – our e-newsletter

This year Financial Services upgraded its communications strategy by releasing this environmentally-friendly digital newsletter which not only brings us into the 21st century but helps to reduce costs. Thank you for graciously accepting these changes.

Financial Services Team - Contacts

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Resources Department web site resources.sa.uca.org.au
On the left hand side 'Resources Menu' simply click 'Finance' for more information about the Financial Services Department and its services.