



Archdiocese of Cape Town Workshop for PFC Chairpersons

25 May 2024

Programme

- 08:30 Registration
- 09:00 Welcome
- 09:05 Presentation
Presenters
 - Mr Graham Wilson (Financial Administrator of ADCT)
 - Fr Charles Prince (Vicar for Property)
 - Fr Robert Bissell (Judicial Vicar)
 - Fr Zane Godwin (Vicar for Pastoral Development)
- 10:30 Break
- 10:40 Questions and Discussion
- 11:15 Closing Remarks

Introduction

- What is this meeting about?
Temporal ◀▶ Spiritual
- Accountability, responsibility, management, delegation, stewardship and ownership in the Church (Parishes, Archdiocese)
- Individual ◀▶ Parish ◀▶ Archdiocese
Underlying balance: Dependence ◀▶ Independence
- Catholic Social Teaching provides a guide (1891 – 2022 – ...)
 - **Life and Dignity of the Person**
 - Vocation, The Dignity of Work and the Rights of Workers
 - The whole person
 - **Option for the Poor and Vulnerable**
 - Inclusion of the most vulnerable
 - Solidarity / Social Justice
 - **The Common Good, Care for God's Creation**
 - Family, Society, and Participation & Contribution to Society
 - Care for our common home
 - Rights and Responsibilities
 - **Subsidiarity / Delegation**

Accountability and responsibility

- *“... sensible man who built his house on rock...
stupid man who built his house on sand...”*

Matthew 7:24-27

- *...a poverty-stricken widow putting in two small coins...*

Luke 21: 1-4

- *“...be cunning as serpents and yet as harmless as doves.”*

Matthew 10:16

- *God, grant me the serenity to accept the things I cannot change, the courage to change the things I can, and the wisdom to know the difference.*

Reinhold Niebuhr

Resources

- Skilled people of good will
- Tools for financial management
 - Budgets, Cash flows
 - Accounting systems
 - Reports
 - Receipts, record keeping
- Collections, Planned Giving, Bequests, Fundraising
- Bank accounts, cash accounts, Treasury accounts
- Electronic banking
- Savings and Maintenance

Archdiocesan Treasury

- **Purpose:** to assist parishes to save
- **Deposit Fund** (cash) – *since 2004*
 - R91m
 - R41m Archdiocese
 - R27m Parishes + others - savings
 - R23m Parishes - PBF
 - every cent of interest paid over
- **Equity Fund “B”** (unit trusts) – *since 2016*
 - R48m
 - R23m Archdiocese (some restricted funds)
 - R25m Parishes + others
 - every cent of gains (losses) paid over (levy free > 1 year)

Relationship of the Parish to the Archdiocese

- Banks, bank accounts
- AFS, SARS, Levies
- Welfare and support of priests
- Group Retirement Annuity (GRA) + GPA
- Ordinary ◀▶ Extraordinary administration
- Permissions and Limits
- Stewardship of parish property
 - Insurance
 - Buildings, contents (general, electronic, all risks), motor vehicles
 - Contractors
 - Public liability
 - Personal accident (volunteers)

Ordinary v Extraordinary Administration

- Distinction
- Level 1: *Particular Law*. **Archdiocesan Regulations**
 - Determined by the Archbishop
 - Issued annually by the Archbishop of Cape Town
 - Currently
 - expenditure of any amount exceeding R12 000
 - Effect ◀ **Consent** is required from the PFC

Ordinary v Extraordinary Administration

- Level 2: *Universal Law*: **Code of Canon Law**
 - Determined by the SACBC
 - Norms 9 and 18 of the SACBC
 - Currently
 - The purchase of immovable property
 - The sale, exchange, mortgage or pawning of immovable Church property or the subjection of it to any other servitude or burden
 - The building, demolition or rebuilding in a new form of a building belonging to the Church, or effecting extraordinary repairs upon such a building, subject to the provision that the value for insurance purposes of the building to be demolished or the cost of the extraordinary repairs be in excess of the amount determined by the SACBC, and the building or rebuilding project involve an expenditure in excess of the amount determined by the SACBC
 - The sale, exchange, mortgage or diversion in any other way from the place for which they were destined of objects of art, historical documents or other movable property of great importance
 - The erection of a cemetery (including a garden of remembrance/memorial garden)
 - Acts involving civil litigation
 - The leasing of ecclesiastical property, when the lease extends over a period of two years
 - Effect ◀ For validity, the act of administration needs the **consent** of:
 - Archdiocesan Finance Council
 - Archdiocesan College of Consulters

Permissions

- Presentation of all the information
- Free vote
- Actual vote
- Absolute majority (>50%) – uneven number is helpful

- Important: The vote of the PFC does not force the hand of the PP, but without the vote the PP cannot legitimately act.

- Request permission:
 - Motor vehicles – Financial Administrator
 - Property issue – Vicar for Property
 - Residential Rental – Vicar General

Property

- Purpose

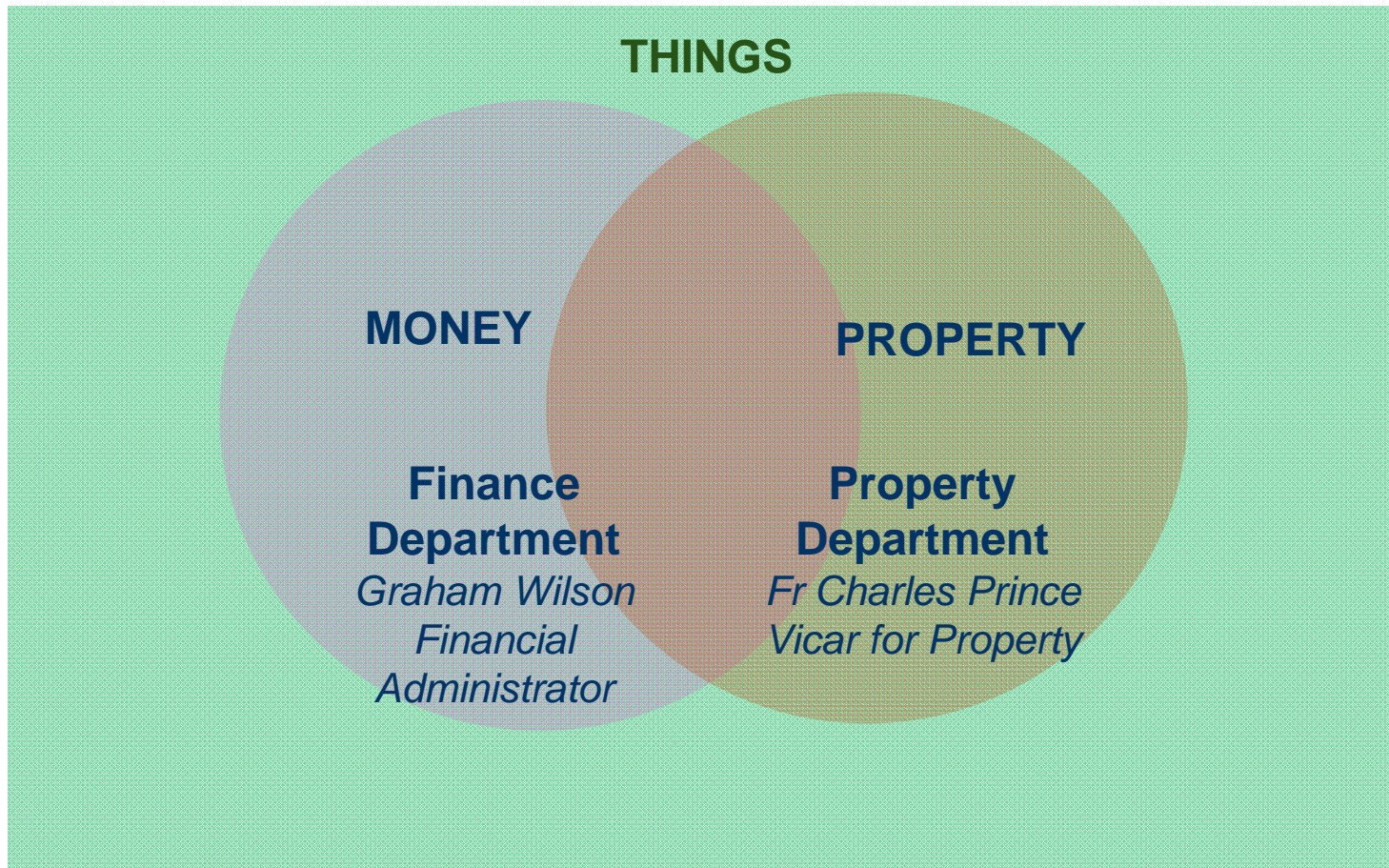
“You shall love the Lord your God with all your heart, and with all your soul, and with all your mind.”

Matthew 22:37

“Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything that I have commanded you. And remember, I am with you always, to the end of the age.”

Matthew 28:19-20

Property



Property - Stewardship

- Stewardship

”Each of you should use whatever gift you have received to serve others, as faithful stewards of God’s grace in its various forms.”

1 Peter 4:10

- Support

- Property Permissions
- Parish Building Fund
- Advent Appeal
- Pontifical Mission Societies

Property - Information

- Statutes
 - Parish Finance Council
- Diocesan Directives (and updates)
 - Permissions and Procedures
 - Leases
 - Annual Limits
- Property Documents
 - Parish Building Fund rules
 - Annual Maintenance Checklist
 - 10-year maintenance plan
 - Property Permission Request Form

Property - Permissions

Property Permission Request

Basic Information		Date	
Parish			
Church			
Building(s)			
Project Name			
BRIEF Project Description			
Does this project entail a liturgical change? (Yes/No)			
<i>A liturgical change involves the alteration of the altar, sanctuary or liturgical art Please include photos and/or diagrams along with the motivation</i>			

Property - Permissions

Quotes	Contractor	Amount	Selected (Yes/No)
1			
2			
3			
Motivation for selected quote:			
<i>Please attach all three quotes</i>			

Property - Permissions

Consent

Date of PFC Meeting on which consent was given	
<i>Please attach a copy of the minutes in the case of an act of extra-ordinary administration</i>	

Date of PPC Meeting at which consultation took place*	
<i>Please attach a copy of the minutes in the case of an act of extra-ordinary administration</i>	
<i>*only <u>required</u> for acts of extraordinary administration, but advisable for all major projects</i>	

Last submission date of annual checklist and 10-year maintenance plan	
---	--

Signature by Parish Priest/Administrator

Date

Name:

Property - Permissions

- Considerations
 - Quotes:
 - Comparable
 - References Checked
 - Source of Funds
 - Check actual amounts
 - Consent and Consultation
 - Minuted in details
 - Specific quote
 - Specific price

The Parish Finance Council

- Roles and responsibilities
- relationship to PPC
- membership and skills
- meetings and decision-making

<Break>

- Questions & Answers

The Parish Finance Council

- **Purpose**

- To facilitate the mission of the Church in the parish
- To support the ministry of the Priest and other ministries
- To ensure the parish is financially sustainable

- **How**

- **Stewardship** ◀▶ **Responsibilities for mission**
- Sound financial management and temporal administration

Relationship between the PFC and PPC

- **Mission of the parish**
- **Finance Council representation on the PPC**
- **Why finances? What needs to be financed?**
- **Who is in charge?**
- **Principles in the relationship between the PPC and the PFC**
 - Primacy of evangelization
 - Development of parishes of missionary disciples
 - Trust
 - Collaboration and cooperation
 - Transparency
 - Service
 - Stewardship for sustainable mission

PFC - Meetings and decision-making

- Not without the PP - convokes
- Quorum – 50 % present (good idea to have an uneven number)
- Minimum of 3 Parishioners
 - In communion with the Church
 - Registered
 - Reason for appointment
 - Degree of consanguinity of clergy of the Parish
- Voting members are only ordinary members
 - Not those co-opted
 - Not the PP
 - Deacons and curates may vote
- Minutes are essential
 - Record
 - Proof of permissions
- Term of Office

PFC - Meetings and decision-making

- Regularly
 - Review expenditure and income
 - Consider new projects
 - Vote on extraordinary administration
- Periodically
 - Budget
 - Plan
 - Fundraising
 - Maintenance
 - Contracts
 - Inventory
 - Report
 - Review banking and Savings
 - PBF
 - Planned Giving
 - Report
 - Promote

Parish Finance Council

THANK YOU!