

*Diocese of Bristol*  
*Share Apportionment 2010*  
*Guidelines for the Confidential Anonymous Income Survey*

**Before the survey day...**

1. Meet with your PCC Standing Committee to work through the following. You may feel that the planning needs to be discussed by the PCC.
2. Decide how many survey forms you need for the survey. Please use the master provided to take the appropriate number of copies. You will need one form for each regular worshipper (those who attend one Sunday per month or more often). Copies can be provided from Church House if necessary provided you let us know the number needed.
3. Ensure confidentiality

The success of the survey in providing an accurate picture of the ability of your congregation to contribute will depend on people trusting that it will be dealt with confidentially. You will need to decide the following in good time:-

- a) Who will administer the survey in your parish? Will it be someone else from within the congregation, someone from a neighbouring parish, or someone from outside the deanery? You will need to ask this person and ensure that they know the times of all the services on the survey Sunday(s), and how the sidesmen will be able to help.
  - b) Who will summarise the survey on the form enclosed - someone from within the congregation, someone from a neighbouring parish, or someone from outside the deanery? Exceptionally, Church House may be able to help with this. Again, you will need to approach a suitable person in good time.
4. Provide a suitable box into which survey forms can be 'posted'. This helps to ensure that no one can identify which form came from which person.
  5. Decide on which Sunday(s) to conduct the survey. Choose "normal" Sunday(s) which are likely to have neither swollen numbers because of a festival or special services, nor depleted numbers because of services elsewhere.

Choose if possible two or more Sundays, so that the survey forms can be issued to all regular attenders (those who attend once per month or more often). If the survey does not achieve sufficient coverage on the first Sunday, it can be followed up on another by giving out forms only to those who say they did not complete one the first time around.

**NB** The best way to ensure that your coverage is giving an accurate picture of your parish income is to use an up-to-date list of regular worshippers and get someone to tick them off as they fill in forms and put them in the box. Provided the box is closed with only a small slot for 'posting', the use of the list does not compromise confidentiality.

6. The success of the survey will depend on the congregation understanding what is being asked of them. Therefore liaise with your incumbent or service leaders for the Sundays designated for the survey so that appropriate announcements can be fitted in before, during or after the service.

**On the survey day...**

1. Ensure that the clearly marked 'posting box' is placed in a prominent position.
2. Make certain that the instructions are also clearly displayed using the enclosed poster.

3. Provide a number of pens/pencils for the all-important ticks.
4. Encourage (insist?) each person present to complete the form before leaving the church, simply by placing one tick on the form (forms taken home don't usually come back!).

**It is essential for the sake of accuracy that:**

- a) Couples be treated as two individuals and asked to complete separate forms.
  - b) Individuals should record their personal (i.e. not their household, family or spouse's) income.
  - c) People who are obviously once-off visitors should not fill in a form.
  - d) Although it is not essential, it is a good idea for children (under 16's) to be asked to complete a form as members of the congregation. However, responses from children will not influence the eventual share calculation.
5. At an appropriate point in the service, address the congregation and reassure them that:
    - a) The survey is confidential;
    - b) It is aimed at producing a fair apportionment of share among congregations of the diocese (inaccurate or incomplete surveys result in unfair apportionment);
    - c) All congregations in the diocese are being asked by the Diocesan Synod to conduct such a survey;
    - d) It is important for both high and low-income earners and non-earners to take part in the survey in order to ensure fairness. A tick in the 'no independent income' box is just as important as any other.
  6. At the end of the day's final service, check the number of forms returned to see whether they give an accurate picture of your congregation's income levels (this is where the ticked-off parish list becomes invaluable to ensure fairness).
  7. Collect the box of returned forms and store in a safe place until another Sunday for the follow up if necessary, or deliver them to the person who will summarise them.

**After the survey has been carried out...**

1. The summariser completes the results summary sheet from the individual survey forms.
2. The summariser should send the results summary sheet to the Diocesan Finance Manager at Church House in Bristol, and confirm to you that it has been sent off.
3. The summariser should keep the original forms for a few weeks in case subsequent checking is necessary.
4. Once survey results have been received from all congregations in the diocese, a draft share apportionment for the year 2010 will be produced.

**Thank you for your help in ensuring the fairness of the share apportionment for 2010.**

**If you have any questions about the administration of this survey, please call David Hargrave or Matthew Hall on 0117 906 0100.**