



THE EPISCOPAL DIOCESE OF VIRGINIA

**Key Resources for Vestry, Finance Committees, and  
Administrators**

230<sup>th</sup> Annual Convention Friday Seminars  
November 8, 2024

# Today's Topics:

- Canonical & Administrative Calendar
- Diocesan Web Resources
- External Resources
- Audits & Parochial Reports
- Property
- Resources and Q&A

# Important Tasks & Dates

- January: Review clergy compensation with CPG
- March 1: Parochial Reports due
- Mid-May: Covenantal giving responses
- August 31: Congregation audits due
- Mid-September: COLA & Insurance Rates Published
- Oct/Nov: Medical Trust open enrollment
- December: Renew clergy housing resolution
- December: Review parochial report login credentials.

# Diocesan Web Resources

- [Constitution and Canons](#)
- [Finance & Management Page](#)
- [Compensation Guidelines](#)
- [Tax-Exempt Status](#)
- [Congregation Audit Forms & Instructions](#)

# External Web Resources

- [Church Pension Group](#)
- [Guide to Clergy Benefits](#)
- [Parochial Reporting Site](#)
- [Episcopal Church Foundation](#)
- [Dominion Payroll](#)

# Helpful Books

- [Manual of Business Methods](#)
- [Church Administration & Finance Manual](#)
- [Financial Management for Episcopal Parishes](#)
- [Doing Holy Business](#)

# Changes to the Parochial Report

- Shorter!
- Instructions in-line with questions
- Accommodates non-traditional forms of community
- Ties in with online parish register
- [In-Depth Video](#) from Episcopal Parish Network
- [Download & review the new form here](#)

# Audits, gotta ~~love~~ do 'em

- Canonically required
- *All* funds of the church, including the church alms account
- Outside firm: Never required; BP is to use one at transitions
- Short form for budgets under \$150,000
- You will need your audits to be current to apply for church debt and diocesan grants



# Parochial Report Notes

- **Make sure you have access to the report. If not:**
  - Try resetting the password via “I forgot my password” link
  - If that fails, contact [Sabrina LaFleur](#) for a full reset
- **If you cannot complete the report online:**
  - Let us know as soon as possible
  - We will have to enter it here, so we will need lead time to get the forms out to you and receive them back
- **Last year’s data is not prepopulated**
  - You can download all your data back to 1998
- **Make every effort to complete both parts of the report**
  - 2023 full completion: 88%, partial completion 94%
- **If you are not done by March 1, don’t panic**
  - The system does not lock until April 30
- **Please submit by April 15**

# Tax Exempt Status

- Only the Treasurer's Office of TEC can certify a congregations 501c3 status, via an [association letter](#).
- Congregations generally aren't incorporated and therefore will not have Articles of Incorporation
- Our corporate form is "Unincorporated Religious Association"
- Use Virginia Constitution & Canons in place of bylaws
- "Beneficial Owner" use senior warden or trustee

# Property, Trustees, and Vestries

- In VA, parish property is held in trust for the Diocese by parish trustees.
- [Canonical processes](#) for alienation of property. 15.2 applies in most cases.
- Trustees have ONE job: Hold real property for the parish.
- Norm: 3 trustees.

# Additional Church Pension Fund Resources

- [A Guide to Clergy Benefits](#)
- [Guía de Beneficios para el Clérigo](#)
- [Clergy Tax Prep Guide](#)
- [Federal Reporting Guide for Episcopal Churches](#)
- [Beneficiary Center](#)

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