

## **Ministry Description - Envelope Secretary**

*Amended by St. Stephen's Parish Council January 13, 2025*

### **Qualification, Knowledge, Attitudes**

A candidate for the position of Envelope Secretary must be able to maintain confidentiality; show good attention to detail; be self-directed in order to meet timelines; and have enough computer knowledge to learn new programs. Knowledge of bookkeeping is preferred.

### **Appointment**

The Incumbent and Church Wardens appoint the Envelope Secretary annually, and the term runs from an Annual Vestry Meeting to the following Annual Vestry Meeting.

### **Responsibilities**

The Envelope Secretary is accountable to the Church Wardens and under the direction of the Treasurer for the accounting of identified donations to St. Stephen's Anglican Church and reporting to donors. Envelope holders may contact the Envelope Secretary to discuss errors in the accounting of their donations.

The Envelope Secretary will use St. Stephen's computer for keeping records.

The Envelope Secretary is a member of the Stewardship and Finance Committee.

The Envelope Secretary is the contact for the Electronic Offering Program.

The Envelope Secretary trains and supervises the Assistant Envelope Secretary.

The Envelope Secretary works with the Incumbent to maintain the Church Family database.

### **Specific Duties**

The Envelope Secretary:

#### **New Envelope Holders**

1. advises the Incumbent of a new envelope number;
2. sets up envelope holder's **Record of Offerings**;

#### **Removing Envelope Holders**

3. advises the Incumbent to remove an Envelope number;

#### **Weekly**

4. enters donations from the weekly **Offering Report** onto a donor's **Record of Offerings**;

#### **Monthly**

5. records the amounts from the Electronic Offering Program **Monthly Donor Report** onto the Record of Offerings;

#### **Quarterly**

6. works with the Treasurer to reconcile donation records with deposit records;
7. ensures that the Incumbent and Church Wardens are made aware of donations that qualify for a plate for the Memorial and/or Friends Boards;

**Bi-Annual Statement (June 30, December 31)**

8. prepares statements and ensures they are distributed with a letter from the Church Wardens; for the June 30 statement, when the donor's e-mail address is known they are sent by e-mail;

**Year End**

9. ensures offering envelopes for the next year are ordered by the 3<sup>rd</sup> week of September;
10. prepares next year's offering envelopes and ensures they are distributed for the 3<sup>rd</sup> Sunday in December:
  - a. those who did not use their envelopes in the current year are not issued envelopes until they ask for them, and
  - b. the Incumbent can print off a set of labels for the envelope boxes;
11. sets up envelope holder's **Record of Offering** on the computer, and advises the Incumbent of changes to make on the **Family Information Form**;
12. prepares Envelope Secretary's Report for the Annual Vestry Report;
13. prints statements and ensures that Charitable Income Tax Receipts are distributed by February 28;
14. ensures previous year's envelopes and copies of statements are organized and stored in an archive box in the Vestry Room cupboard such that it is easy to audit them;
15. ensures that records in archive boxes older than seven years are destroyed;
16. reviews the notes in the Parish Handbook concerning the Envelope Secretary and assists the Incumbent in keeping these notes up to date;

**Memorial Donations**

17. sends an acknowledgement of the donation to the family of the person in whose memory the donation was given within a month of the donation being received.

**Supervision/Accountability**

The Envelope Secretary is accountable to, and under the direction of, the Church Wardens. However, in practice, the Treasurer may oversee the work of the Envelope Secretary.

The appointment as the Envelope Secretary may be discontinued by the Incumbent and Church Wardens for not carrying out the responsibilities and duties of the Envelope Secretary.

**Stewardship and Finance Committee**

The Stewardship and Finance Committee's purpose is to assist the Incumbent and Church Wardens with financial decisions and to communicate the financial information to the parish. The decision-making authority of the Committee is based on the Incumbent and Church Wardens being members of the Committee. The Committee may give direction to the Envelope Secretary.