



# **Parish Implementation Handbook**

1st Edition (July 2017)



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The Parish Giving Scheme was created within the Diocese of Gloucester in 2009 and has since been endorsed by The Archbishops' Council. It has been part of a joint venture charity since December 2014; that it is a separate charitable limited company, wholly owned by diocese who have joined as members.

The Diocese of Hereford formally joined the Parish Giving Scheme on 1<sup>st</sup> February 2018.

Throughout this guide and associated materials PGS refers to the Parish Giving Scheme.

Parish Giving Scheme Ltd

Registered England Number 8824540

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#### 1 About this handbook

#### Aim of the handbook

This handbook is intended to provide a single reference document for local churches within the Diocese of Hereford, who are intending to implement the Parish Giving Scheme (PGS) locally. This document will be useful to:

- PCC Treasurers
- PCC Gift Aid Secretaries
- Clergy & Ministry Teams
  - Churchwardens
  - PCC Members

You can have more copies of this handbook to help to promote and introduce PGS within your Parish. This handbook and other helpful information is available on the Diocesan website at the finance and stewardship pages:

www.hereford.anglican.org/Finance/

#### **Related Documents**

A selection of materials are available to support you and your PCC as you introduce PGS within your parish and also to facilitate the on-going administration of the system. These materials fall into two categories:

- Materials intended for PCC are available on the Diocesan website and reproduced in Section 9:
  - o Implementation Handbook
    - Parish Action Checklist
    - Parish Registration Form
    - o Resources Order Form
- Materials intended for individual donors are provided by the Diocesan Office, once your PCC
  has registered with PGS:
  - o Donor Gift Form
  - o Donor Booklet, "Giving to Your Local Church Through the PGS"
    - o "Better Way to Help Your Local Church" Leaflet

Please do not photocopy the donor resources. We recommend you order printed material for distribution to potential donors by contacting the Diocesan Office using the contact details provided in Section 7 of this Handbook. There is no charge for these materials and you can be sure of offering your donors high quality printed materials.

Resources for use by Parish Officers and PCCs can be printed locally by parish representatives.

#### Structure of this Handbook

The sections that follow are:

- Section 2 "Why" the reasons for adopting the PGS in the Diocese of Hereford
  - Section 3- "How" details of how the PGS works
- Section 4 "What" steps to achieve a successful launch of the Scheme in your parish
- Sections 5 & 6
   — "Action" guidance on registering your church and implementing PGS
  - Section 7 "Who" details of who to contact for further support
  - Sections 8 & 9- "Resources" resources to help launch and administer PGS

### **Copyright Notices**

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- The logo is only used in articles or posters relating directly to the PGS
- No changes are made to the logo, other than resizing (but please preserve the aspect ratio)
   If you wish to use the logo please seek permission from Parish Giving Scheme Ltd info@parishgivingscheme.org.uk and state you agree to the above conditions.

### **Acknowledgements**

Thanks go to the team at Parish Giving Scheme Ltd and to National Church Officers for their support and guidance. In addition, thanks go to Stewardship Advisers in the Dioceses of Portsmouth, Chichester, Bristol and Exeter for their generosity in sharing their knowledge, experience and example resources.

Thank you also to the parishes of the Diocese of Hereford who have participated within pilot PGS trials prior to a wider launch of PGS. Their enthusiasm for the scheme has enabled others to learn more and their helpful feedback has been extremely valuable in preparing for the wider use of PGS across the Diocese.

# 2 Why Parish Giving Scheme?

## Why adopt the Parish Giving Scheme within the Diocese of Hereford?

"The way people give is changing and through the introduction of the Parish Giving Scheme into this diocese, it's great to see that giving to the local church is changing too. Features of the scheme, such as Gift Aid reclaim, quick, easy and regular receipts straight to a parish bank account, and an inflation proof option too, are going to be a huge benefit to the church too; I am excited by the potential the Parish Giving Scheme offers, both to our churches are to their givers. I urge you and your church to get involved"

Sam Pratley, Diocesan Secretary, Diocese of Hereford

#### Giving that makes a difference

We want to encourage generosity, efficiency and regularity in giving; so that properly resourced the Kingdom of God will grow through the flourishing of the life of the local church; so donors know their money is being used well and so that PCCs can budget confidently.

#### PGS has some unique benefits

The PGS brings a number of unique benefits, which are not offered by any other way of regular giving:-

- Being a direct debit scheme, the PGS enables your church (the beneficiary) to maintain control over the mechanics of payment. Significantly, it means that an inflationary uplift can be automatically applied each year, if the donor agrees to this and ticks the appropriate box on the registration form.
  - A donor can choose to remain anonymous to your local church. This can be helpful in
    encouraging those who, for various reasons, feel more comfortable with their donations being kept
    anonymous, whilst still enabling the church to benefit from Gift Aid

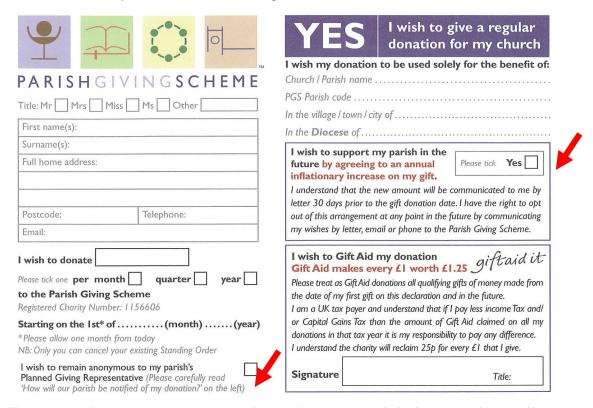


Figure 1: the form enables a donor to sign up for an annual inflationary uplift and, if they choose, to remain anonymous to the local church

NOTE: Please DO NOT photocopy donor forms! The design has been approved by PGS bankers and photocopied versions of these forms will not be accepted by the PGS office.

# 3 How Does Parish Giving Scheme Work?

### The 10-day cycle

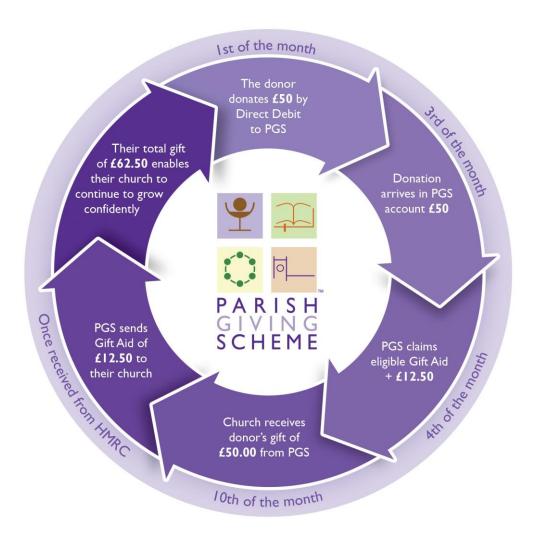


Figure 2: The PGS operates on a monthly cycle, collecting from donors on the 1st of each month, claiming the gift aid on the 4<sup>th</sup> of each month, sending the gifts to your local church within 10 working days of collection. Gift aid is returned as soon as it is received from HMRC.

# Advantages for donors

Many donors are accustomed to automatic direct-debit-based systems and think the traditional ways of collecting money by the local church are a bit out of date!

Some people are suspicious of the direct debit processing system. They needn't be! It is the only payment method with a **money back guarantee**, and is therefore safer for the donor than standing orders, cheques and cash. If you want to read more about this, go to **www.bacs.co.uk/Bacs/Businesses/DirectDebit** 

Donors may have their gift automatically increased in line with inflation each year, if they so choose. (Inflationary increase is based on the Retail Prices Index). Also, donors can remain anonymous to their local churches if they prefer.

#### For local churches

As shown above, the PGS remits the donations directly to the local church's bank account within ten working days of collection each month, with gift aid following as a second payment each month. The Statement Receiver (typically the Church Treasurer) can access an online report showing names and amounts for each donation. Anonymous gifts are also detailed on the statement; the donor names are simply omitted.



			Cı	urrent Mon	th	Financ	ial Year To	Date	Calend	ar Year T	o Date		
Transaction Donor Ref	Description	Contact ID	Donation Received	Gift Aid	Total	Donation Received	Gift Aid	Total	Donation Received	Gift Aid	Total	Frequency	Inflation
Cllr D Horton	PGS THANK YOU-9261	14149	70	17.5	87.5	140	35	175	420	105	525	M	Υ
Mr & Mrs H Horton	PGS THANK YOU-9471	14381	200	50	250	200	50	250	400	100	500	Q	N
The Revd G Granger	PGS THANK YOU-9472	14386	150	37.5	187.5	300	75	375	900	225	1125	M	Υ
Mr O Newitt	PGS THANK YOU-9259	14389	90	22.5	112.5	180	45	225	540	135			Υ
Mr F Pickle	PGS THANK YOU-9365	14529	60	0	60	120	0	120	360	0	360	М	N
Mr J Trott	PGS THANK YOU-9263	14568	30	7.5	37.5	60	15	75	180	45	225	M	Υ
Anonymous	PGS THANK YOU-9080	14577	40	10	50	80	20	100	240	60	300	M	N
Miss K Minogue	PGS THANK YOU-9470	14599	1000	0	1000	1000	0	1000	1000	0	1000	A	Υ
Mr S Horton	PGS THANK YOU-9264	14623	65	16.25	81.25	65	16.25	81.25	65	16.25	81.25	M	N
	G	rand Totals:	1705	161.25	1866.25	2145	256.25	2401.25	4105	686.25	4791.25		

Joiners	Leavers	
Mr S Horton (14623)	Mrs Cropley (14694)	
Key:	Frequency	Inflationary Increase
	M = Monthly	Y = Yes to Inflationary Increase
	Q = Quarterly	N = No to Inflationary Increase
	A = Annual	

Figure 3: The PCC Treasurer or Giving Officer will receive a monthly statement. Note that in the example above, some donors have chosen to remain anonymous.

In this example £1860 would be remitted to the parish on 10<sup>th</sup> of the month with the gift aid of £465 following as a second payment as soon as the monies are received from HMRC

As more and more donors switch to the PGS, it will save many hours of administrative time at a local church level. PGS donations are much easier for the Treasurer (or Giving Officer) to reconcile than standing orders or cash. It will improve cash flow to church funds, since Gift Aid is added each month. With a donor option to opt for an inflationary uplift (which the majority of people adopt), church receipts should increase year on year and the dangers of static giving levels and values eroded by inflation are avoided.

### Other questions often asked by PCC's

A "Frequently Asked Questions" document, intended for distribution beyond the PCC is reproduced in Section 9 and is available for download from the Diocesan website.

# 4 What does your church need to do?

#### Be realistic

The PGS will not solve all financial problems that a local church might have. However, it does offer an important opportunity to engage people in thinking about their own levels of financial generosity to their church.

It is strongly recommended that you run a giving renewal programme, and take advantage of the opportunity to encourage giving, as well as introducing the PGS as your church's preferred method of giving. PGS is an excellent tool to help your church to process incoming giving and administer Gift Aid, but it is not of itself a motivational tool to elicit higher levels of giving.

Despite the realistic perspective above, parishes in other dioceses have found that a discussion about the PGS can act as a very effective prompt to people to think about their current level of giving, and to then review it. As one person put it, "it's a comfortable way into an uncomfortable conversation!"

### **Pray**

We need to seek God's guidance before we make any significant decision affecting our church.

#### Pass a PCC resolution

Joining the PGS will mean that money from participating donors will flow to the PCC through the PGS, rather than directly from the donor to the church, as with other methods. It is important therefore that the trustees of the local church (the PCC) pass and minute a resolution. It can be as simple as:

"We the PCC of ... agree to join the Parish Giving Scheme and to agree to receive donations from the scheme in favour of this parish." Copies of this resolution will be provided to, for you PCC Chair to sign. Retain one copy for your PCC minutes as a record and return the 2<sup>nd</sup> copy to the Diocese of Hereford.

Aide-memoire:
Write here the date the PCC resolution was passed

# Register your church

Use the Registration Form PGS2 (you can photocopy it if you wish) to register your church. The first page of the form collects data about church officers, and beneficiary bank account details. The second page asks for some statistics about your current patterns of giving, to give a base from which to measure the effectiveness of PGS. It also provides donor numbers from which we can estimate the quantity of resources you might need for local use. Please complete both pages.

Aide-memoire:	
Write here the date the form was sent to the Diocesan Office	

The process works at its most efficient when no queries need to be raised about completed forms either by the Diocesan Office or members of the PGS Team. Please complete forms as clearly and accurately as possible:

 Copies of the Registration Form are available for download on the Diocesan website www.hereford.anglican.org/Finance/ or can be sent to you upon request.  If completing the form by hand, please use BLOCK CAPITALS to ensure all details are legible (especially bank details). Please ensure that this form is signed by PCC representatives before returning it.

#### Page one of the Registration Form

Please ensure that all sections of this first page are **fully completed** except for the PGS Code; this code will be allocated by the Diocesan Office and provided to the parish later.

Please note that when supplying details of the project leader and the statement receiver on the form, it is NOT sufficient merely to state their position e.g. Treasurer. The PGS systems require name and contact details.

In the event of further queries, diocesan representatives will contact the individual(s) named as PGS Project Leader and Statement Receiver to discuss any aspects of the implementation of the Scheme in your Parish

The church name used to register your parish is important; This is the church name that will appear on donor resources and communications from the PGS team. To ensure donors have confidence in the scheme, we want to make sure that the parish and church name reflects the local reality. Should your church be known locally as something different, then please inform the Diocesan Office at the point of Registration so the appropriate parish name is allocated. (Please note that parish names should not exceed 30 characters).

Once all the parish details are complete, the form needs to be **signed** by the relevant church officers and **dated**. If the parish is in vacancy, two church wardens may sign in place of incumbent.

#### Page two of the Registration Form - Stewardship information & statistics

This section of the form is important and will be of value in measuring the success of PGS in your parish and within the wider Diocese. The information also provides the detail needed for us to determine the quantity of resources required by a parish on registration.

Please consider whether the PGS offertory tokens will be required within your parish (use is not obligatory).

Please indicate on the form if you will be using these tokens.

If you would like more information about giving renewal programmes within your church, please contact the Diocesan Office.

# Submit your completed Registration Form PGS2

The completed and signed Registration Form should be sent to:

**PGS Hereford Diocese, Finance Department,** 

Diocese of Hereford, The Palace, Hereford, HR4 9BL

If you prefer, a scanned copy of the signed form can be emailed to finance@hereford.anglican.org

When you submit your parish registration form, please also include a copy of a paying in slip for the parish bank account matching the details on the registration form. This is for verification purposes.

#### What happens after submitting your Parish Registration Form?

PGS operations within the Diocese of Hereford are handled by the Finance Team. Using the generic finance team email address will ensure that registrations, resource orders, etc., are processed as quickly as possible.

#### On receipt of your Church Registration Form:-

- Receipt of the Parish Registration Form will be acknowledged to you and any queries dealt with.
   Communication will typically be with the parish PGS project leader and statement receiver;
- We send all required information to the central PGS team to enable your parish to be registered and set up with the scheme.
- The PGS team will process the application. Your Statement Receiver will receive a letter from PGS
  confirming PGS registration and outlining important parish details. Please check all details
  thoroughly before donors begin to register with PGS.
- Parish resource packs are prepared at the Diocesan Office. The quantity of packs provided will be based on the numbers of regular givers detailed on page two of your registration form. Additional resources can be made available (See Section 9 for the Resource Order Form).
- The packs are too heavy to post. It is preferable for resources to be collected from the Hereford or Ludlow Diocesan Officers by a parish representative, if at all possible. If there is a member of staff from the Diocesan Office working within your local area within an appropriate timescale, we will do what we can to deliver the resources by hand.
  - Diocesan Finance and Giving Team officers and staff are available to parishes for support in implementing the PGS as the need arises.

# 5 Implementing Parish Giving Scheme locally

#### Organising a giving renewal programme

When introducing the PGS locally, there exists a great opportunity for parishes to engage in a form of **giving initiative** at the same time. Experience reveals a much **stronger take-up** of the PGS when it is offered as a vehicle for giving, in conjunction with a parish giving renewal programme. More importantly, this provides an ideal opportunity to **encourage** people in their Christian giving. As with any well-designed giving renewal programme, this is another way of **sharing vision** and demonstrating how **generosity enables** the funding of Christ's mission and ministry within a local context. Communicating this link is crucial:

'...when we seek to raise funds we are not saying, "Please, could you help us out because lately it has been hard." ... rather we are declaring, "We have a vision that is amazing and exciting. We are inviting you to invest yourself through the resources God has given you – your energy, your prayers and your money – in this work to which God has called us."

Henri Nouwen, The Spirituality of Fundraising

If you have recently engaged in a giving renewal programme, prior to joining PGS, you may prefer to simply offer the PGS within some key messages and a lower key 'giving review' to aid the take-up of PGS.

Resources to help guide you in this process are readily available and summarised in Section 8 of this handbook; please contact the Diocesan Office for more information about organising a giving renewal programme in your parish.

# Collating resources

On receipt of your PGS packs from the Diocesan Office, you will need to prepare the resources ready for local distribution and plan the distribution to fit with any local giving renewal programme that's planned.

#### **Parish Giving Scheme Pack**

Each Pack will contain quantities of "A better way to help your local church" leaflets.

#### These are designed for:

- existing planned givers (giving by envelope or standing order) who we are seeking to move to giving via
  the PGS
  - new church members who might want to know more about how they can give to their local church financially;
    - others who might have heard about the PGS and want more information;
  - people who have seen the PGS 'tokens' in use at the offertory and who are curious to know more.

Please don't simply leave these leaflets at the back of the church to gather dust. In this way they are guaranteed to have no impact whatsoever and will not enhance giving to your church in any way at all!

Before you distribute them, please insert the name and telephone number/email address of a local contact in the space on the back. The space accommodates a small label 72x21.1mm; L7665) which you could pre-print with these details.

Your parish pack will also contain **gift forms**, **donor information booklets** and **pre-printed labels** particular to your parish. If you have opted to use the offertory tokens, there will also be provided.

The **gift forms** are A3 size, folded into an A5 format. They explain the scheme in some detail. **Before you** issue a form to a prospective donor, please stick one of the labels onto the form as shown:



I wish my donation to be used solely for the benefit of:

Church/Parish Name:	Dibley	
PGS Parish Code:	18-9999999999	Stick the label here
in the Diocese of	HEREFORD	*****

The donor booklet, has a space on the back for details of your local contact if you wish. Again, before you distribute them, you can insert the name and telephone number/email address of a local contact. The space on the back accommodates a small label (72x21.1mm; L7665) which you can pre-print with the details.

The **gift form**, suitably labelled as above, plus a **donor booklet** (also suitably labelled) can be given to anybody who:

- Has expressed an interest in planned giving, or
- Is willing to 'convert' to the PGS from their existing method of regular giving.

If appropriate, you should remind them to cancel their existing standing orders at the appropriate time.

#### **Distribution**

Forms and Booklets, together with an appropriate covering letter (written locally), should be addressed personally and sent or handed to donors directly.

Simply leaving piles of the donor forms and booklets at the back of the Church is unlikely to lead to a good take up of the PGS. That being said, having some available for people just to pick up may help those who want to give anonymously; having to ask for a pack will deter those who want to remain anonymous so be mindful of the need for a variety of approaches!

If your parish has opted to use **giving tokens** these should be available for donors to collect at each service rather than individuals having to remember to bring their token with them each time. Leave a quantity in a basket or plate near the door through which people enter your church building for worship.

Experience from other dioceses has shown that, if you ask PCC members to adopt PGS first, as their preferred way of giving, other church members are more likely to take up PGS too.

If you issue a Stamped Addressed Envelope (either C5 or DL size) with individual donor forms, addressed to Parish Giving Scheme, Church House, College Green, Gloucester GL1 2LY, you will only reduce confusion as to where to send the completed form, but also increase the response rate.

Individual Donor Forms must be sent to the PGS office directly; if a donor wants to guarantee that their gift starts in the month they have requested, gift forms must be received by the PGS at least one full month before the date the first gift is due.

Alternatively a parish may decide to request the return of all completed donor forms to the local PGS project leader, who forwards all such forms to the central PGS office. However, there is a need to ensure that the nominated local recipient is one of the authorised persons named on the PGS Parish Registration Form and that processing donor forms in this way does not lead to any additional delays in forms being submitted to the PGS Office and important deadlines potentially being missed.

To ensure efficiency and smooth running, the PGS staff prefer that gift forms are NOT sent in bulk batches by parish Treasurers; if possible encourage individuals send their own donor forms to the PGS, although it appreciated that this will not always be possible.

### 6 Moving Forward

### **Giving practice**

The number of donors giving through the PGS will increase as the Scheme becomes established in your parish and the other giving methods (standing order and weekly envelopes) will reduce in time. Local promotion of PGS will need to continue at parish level as new people join the congregation and regular teaching and preaching about generous giving should continue to take place.

It's a good opportunity to reflect upon giving practices in your parish and ensure that as well as periodic giving renewal programmes, you have a process of thanking regular givers each year (irrespective of the method they employ) and a process of encouraging annual renewal. You'll find all the resources you need for these aspects at the Stewardship and Giving pages of the diocesan website <a href="https://www.hereford.anglican.org/stewardship/">https://www.hereford.anglican.org/stewardship/</a>

For further support in all aspects of Giving and Stewardship, please contact the Diocesan Office.

#### Gift Aid

To make a claim through the Gift Aid Small Donations Scheme (GASDS), parishes need a direct relationship with HMRC. Each church should claim Gift Aid, outside of the PGS, on at least £500 per tax year up to the end of 2015/2016 tax year. This will still allow your church to claim the full £5000 of GASDS on eligible donations. From the 2018 tax year this allowance rises to £8000, and the need to claim a minimum of £800 of Gift Aid receipts outside of the PGS.

This shouldn't be an issue for most churches as it is unlikely that all donors will be using PGS and there will still be one-off gifts from special services etc. Nevertheless, it is something to bear in mind.

This situation may change as the PGS Team and the National Stewardship Adviser are in discussions with HMRC to allow donations through PGS to "count" at parish level for the purposes of GASDS eligibility and limits.

For further guidance on this please contact the Finance Department at the Diocesan Office.

#### 7 Contact Details

Below are the details about who to contact about different aspects of PGS:

### **Not Yet Registered**

If you are interested in registering or have any other questions, please contact the Parish Giving Advisers:

**Richard Jones** 

Tel: 01432 373344

Email: richardjones@hereford.anglican.org

or

**Val Smith** 

Tel: 01584 233124

E-mail: val.smith@hereford.anglican.org

There is also information available at:

www.hereford.anglican.org/Finance/

### **Already Registered**

If your church is already registered with PGS and:-

- a) you would like more resources, advice about giving and stewardship or support increasing the take up of PGS in your parish, then please contact the Parish Giving Advisers (details as above).
- b) you would like to change key personnel such as the Treasurer, Statement Receiver or Project leader or update their contact details then please contact:

Hereford Diocesan Office, Finance Department Tel: 01432 373300 Email: finance@hereford.anglican.org

c) you have queries relating to donors, donations and parish statements then please contact:

**Parish Giving Scheme Officer** 

Parish Giving Scheme, Church House, College Green, Gloucester, GL1 2LY Tel: 01452 835595

Email: info@parishgivingscheme.org.uk

d) you want to know where to refer existing PGS donors to discuss their individual giving through the PGS, then please direct them to:

**Parish Giving Scheme Officer** 

Parish Giving Scheme Office, Church House, College Green, Gloucester, GL1 2LY Tel: 01452 835595

Email: info@parishgivingscheme.org.uk

# 8 Stewardship Resources

The launch of PGS is a fantastic opportunity to raise the profile of stewardship in your parish. Experience in our Diocese and neighbouring Dioceses reveals a much stronger take up of the PGS when it is offered as a vehicle for giving as part of a **Stewardship Programme**. This stronger take up is both in terms of **donor** numbers and giving levels.

If you have recently engaged in a stewardship programme (within the last two years) prior to the launch of the PGS you may prefer to simply offer the PGS within an annual review of giving to aid the take up of the scheme.

The launch of PGS provides an ideal occasion to encourage your parishioners in their Christian giving and to reflect on this giving as part of discipleship. As with any well designed Stewardship Programme it is another way of declaring vision and demonstrating how generosity enables the funding of Christ's mission and ministry. It is crucial to use this to link generosity with the mission and ministry that flows from it.

There are many types of Stewardship Programmes that a church can choose from. Please adopt one most appropriate to your parish and introduce the PGS through the programme as a preferred method of giving.

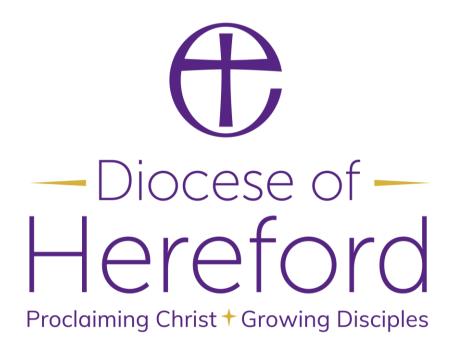
Your Diocesan Parish Giving Advisers will be able to advise you further on these aspects and will discuss stewardship and giving renewal with you when you meet with them to discuss joining PGS.

### 9 Useful Information & Forms



In preparation for joining PGS your parish will be e-mailed the following documents and forms for you to copy and use with your PCC and congregation:

- PGS Parish Implementation Handbook (this booklet)
- PGS within the Diocese of Hereford Introductory leaflet
  - Frequently Asked Questions
    - PCC Resolution
    - Parish Action Checklist
  - List of church/parish names/Parish PGS Codes
    - Parish Registration Form
  - Resources Request (for initial and future orders)



"I truly believe that the Parish Giving Scheme has the potential to transform levels of financial giving within the parishes of this diocese. Experience from others has shown that in conjunction with engaging and exciting parish giving and generosity initiatives, this scheme is a powerful tool. It has the potential to underpin and grow local Christian life and mission, with healthy levels of giving and robust finances.

I commend it to you wholeheartedly".

The Rt. Revd Richard Frith

Bishop of Hereford