





Implementation Handbook for Local Churches 5th Edition (Aug 2017)

"Enhance your parish income by using the Parish Giving Scheme. It saves time for both the Treasurer and the Gift Aid Coordinator and encourages donors to assess their giving annually"

Wendy - Treasurer and Project Leader in Portsmouth Pre-Launch

"Parish Giving Scheme is a simple and easy to use system which has been welcomed and embraced by those who have tried it".

Project Leader in Portsmouth Pre-Launch

"I found the whole process easy and professional"

Project Leader in Portsmouth Pre-Launch

"PGS is a very good idea and it is easy to use. It makes donating much easier and gives the parish a regular donation"

John – Portsmouth Pre-Launch Donor

"The Scheme is very impressive"

Anonymous Portsmouth Pre-Launch Donor

"It is less of an administrative burden on the parish and is more secure than standing orders ..."

Anonymous Portsmouth Pre-launch Donor

"I think the scheme is current, flexible and transparent. I am pleased to be part of a forward thinking scheme which will benefit my own parish and encourage inflation-proofed giving".

Julie – Portsmouth Pre-Launch Donor

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The PGS started life in the Diocese of Gloucester in 2009 and has since gained the national backing of The Archbishops' Council; it has been part of a new joint venture charity since December 2014, so that it is a separate charitable limited company, **Parish Giving Scheme Ltd (Registered England Number 8824540; Registered Charity number 1156606).** There are now 18 Dioceses participating in the Scheme.

1 About This Handbook

Aim of the Handbook

It is intended to provide a single reference document for local churches in our Diocese, looking to implement the Parish Giving Scheme (PGS) at parish level. It is therefore hoped that this document will be of use to:

- PCC Treasurers
- Parish Stewardship Promoters
- Clergy & Ministry Teams
- Churchwardens
- PCC Members

You can have as many copies of the document as you like to help facilitate the process of launching the PGS in your Parish. This Handbook and other helpful information is available on the Diocesan website:

https://www.portsmouth.anglican.org/parish-giving-scheme/

Related Documents

A selection of materials are available to support you as you implement PGS in your parish and also to facilitate the administration of the system moving forward. These materials fall into two categories:

- Materials intended for PCC use (these are in A4 format) are available on the Diocesan website and reproduced in Section 9:
 - o Implementation Handbook
 - Parish Action Checklist
 - Parish Registration Form
- Materials intended for individual donors (these are in A5 format) are provided by the Stewardship Adviser, once the PCC has registered with PGS:
 - o Donor Gift Form
 - Donor Booklet, "Giving to Your Local Church Through the PGS"
 - o "PGS Explained" Leaflet

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

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

Structure of this Handbook

The sections that follow are:

- Section 2 "Why" the rationale behind adopting the PGS in our Diocese
- Section 3– "How" details about 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 the Scheme
- Section 7 "Who" details of who to contact for support when needed
- Sections 8 & 9- "Resources" resources to help launch and administer the scheme

Copyright Notices

The PGS logo, which is used in this handbook and on the various PGS materials, is Trademarked ™ and is the property of the Parish Giving Scheme Ltd.



Please contact the PGS Team should you wish to use PGS Logos, imagery or text (info@parishgivingscheme.org.uk). The PGS policy is as follows:-

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- 1. The PGS four square logo is a trademark of the PGS. The logo and any other images provided by the PGS may not be reproduced in whole or in part without the written permission of the PGS.
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- 5. All images and text from the PGS website remain copyright of the PGS. Information should only be accessed by authorised individuals and should not be distributed to those not authorised to access them.

Acknowledgements

Thanks go to the team at Parish Giving Scheme Ltd and to John Preston, the National Stewardship Officer for their support and guidance in the process to date. In addition, thanks go to the Stewardship Advisers in the Dioceses of Winchester, Chichester, Guildford and Liverpool for their generosity in sharing their knowledge, experience and example resources.

Thank you also to the parish volunteers in the nine parishes involved in the pre-launch phase in 2014. Their enthusiasm for the scheme enabled the pre-launch phase to run smoothly and their helpful feedback was extremely valuable in preparing for the roll out across our Diocese.

2 Why Parish Giving Scheme?

Why We Adopted Parish Giving Scheme in Portsmouth Diocese

"The PGS is great news! It offers parishes and their hard pressed treasurers an extremely efficient and hugely beneficial new way to care for and value those supporting the work of the church through financial giving".

Wendy Kennedy, Diocesan Secretary, Portsmouth.

It will help us be more efficient

We want to encourage efficiency and regularity in giving; efficiency so donors know their money is being used well and regularity so PCCs can budget confidently.

It has some unique benefits

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

- Being a direct debit scheme, the PGS enables the 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 ticks the appropriate box on the form.
- A donor can choose to remain anonymous to the 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

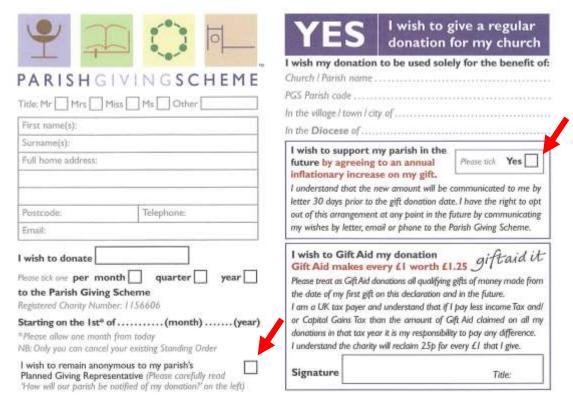


Figure 1: the form enables a donor to sign up for an annual inflationary uplift and, if they choose, to remain anonymous to the local church

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

The 10-Day Cycle

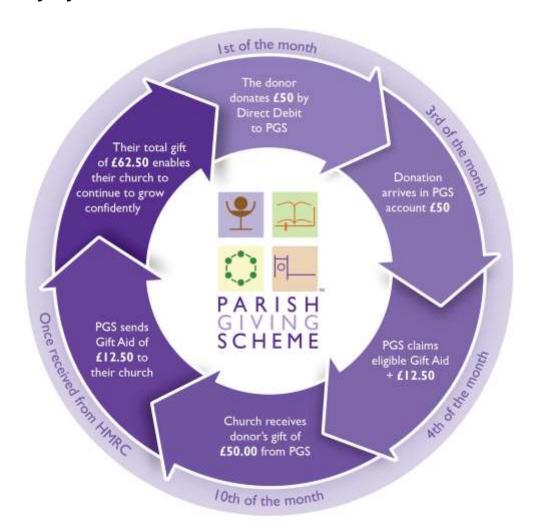


Figure 2: The PGS operates on a monthly cycle, collecting from donors on the 1st of each month, claiming the gift aid on the 4th of each month, sending the gifts back to the local church within 10 working days of collection, then the gift aid is returned as soon as it is received from HMRC.

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 donation automatically uplifted 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 (usually the Treasurer) can access an online report showing names and amounts for each donation. Anonymous Gifts are also detailed on the statement, just with names omitted.



			C	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
Cilr 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	Y
Mr O Newitt	PGS THANK YOU-9259	14389	90	22.5	112.5	180	45	225	540	135	675	M	Υ
Mr F Pickle	PGS THANK YOU-9365	14529	60	0	60	120	0	120	360	0	360	M	N
Mr J Trott	PGS THANK YOU-9263	14568	30	7.5	37.5	60	15	75	180	45	225	M	Y
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	Y
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
manad bedder dan		Grand Totals:	1705	161.25	1866.25	2145	256.25	2401.25	4105	686.25	4791.25	5	2
Joiners	Leavers												
Mr S Horton (14623)	Mrs Cropley (14694)												
Rey:		Sonary Increase											
		es to inflationary inch to to inflationary inch											

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 £11705 would be remitted to the parish on 10th of the month with the gift aid of £161.25 following as a second lump sum as soon as the monies are received from HMRC, totalling £1866.25 for the month.

As more and more donors switch to the PGS, it will save many hours of administrative time at local church level. Donations are much easier for the Treasurer (or Giving Officer) to reconcile than standing orders or cash. It will improve cash flow, since Gift Aid is added each month. Furthermore, with the donor option to accept an inflationary uplift (which the majority of people tend to adopt), the church receipts should increase year on year.

4 What Does Your Church Need To Do?

Be Realistic

The PGS will not solve all your financial problems with one 'silver bullet'. However, it does offer a 'golden opportunity' to engage people in thinking about their own level of financial generosity.

It is strongly recommended that you run a **stewardship programme**, to take advantage of the opportunity to discuss giving as well as being a way to introduce the PGS as a preferred method of payment. As already explained, the PGS is a good **mechanical** tool to help your church to process incoming donations and administer Gift Aid, but it is not of itself a **motivational** tool to elicit more giving.

Despite the realistic perspective above, parishes in our neighbouring Dioceses have found that a discussion about the PGS can act as a **prompt** for people to think about their level of giving, and 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 ... request the PGS to commence operation of the scheme on our behalf."

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

Register Your Church

Use the Registration Form at the back of this booklet (you can photocopy it if you wish) to register your church. The first page of the form collects data about church officers and destination bank account details. The second page asks for some statistics about your current patterns of giving, to give us a base from which to measure the effectiveness of the system. It also provides us with the donor numbers on which we base the numbers of resources provided to you initially. We therefore need you to 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 Stewardship Adviser or members of the PGS Team. Therefore please complete forms as clearly and accurately as possible:

- Copies of the Registration Form are available for download on the Diocesan website https://www.portsmouth.anglican.org/parish-giving-scheme/resources/ and these can be typed, printed and then signed by the relevant PCC representatives.
- If completing the form by hand, please use **BLOCK CAPITALS** to ensure all details are legible (especially bank details).

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 Stewardship Adviser and provided to the parish later, therefore please leave this box blank.

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

The Stewardship Adviser will contact the individual(s) named as Overall Project Leader and Statement Receiver to discuss any aspects of the implementation of the Scheme in your Parish, if the need arises.

The church name used to register your parish is important as 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 name reflects the local reality. A master list has been produced based on the legal parish names, with appropriate variations where notification has already been received. This is reproduced in Section 9 for ease of reference. Should your church be known as something different

locally then please inform the Stewardship Adviser at the point of Registration so the appropriate parish name is allocated. (Please note that parish names should not exceed 30 characters, including spaces).

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 enabling us to assess the success of PGS in our Diocese and to help inform our approach to fully support parishes. The information also provides the detail needed for us to determine the number of resources required by a parish on registration.

Please consider whether the PGS tokens will be of benefit in your parish (use is not obligatory). Please then indicate on the form whether you will be using the tokens.

If you would like more information about stewardship programmes which you could use in your church, please contact Victoria James the Stewardship Adviser.

Send in the Completed Registration Form

The **completed and signed Registration Form** along with a copy of a blank **paying in slip**¹ for the parish bank account detailed on the registration form should be sent to:

Victoria James, 1st Floor, Peninsular House, Wharf Road, Portsmouth, PO2 8HB

If you prefer, a **scanned copy** of the signed form and paying in slip can be emailed to **parishgivingscheme@portsmouth.anglican.org**

What Will Happen After You Submit Your Registration Form to the Diocesan Office?

The running of the PGS is handled by the Stewardship Adviser with support from the Administrator for the Mission Discipleship and Ministry Team. Therefore the use of the central PGS email will ensure that registrations can be processed as quickly as possible and processing is not limited to times when the Stewardship Adviser is in the office.

On receipt of your Church Registration Form, the following stages will take place:-

- Receipt of the Parish Registration Form will be acknowledged and any queries dealt with. Communication will generally be with the overall project leader and statement receiver;
- We will send all relevant information to the PGS team to enable the parish to be set up with the scheme.
- PGS team will process the application. Your Statement Receiver will receive a letter from PGS
 confirming the registration and outlining the important parish details. Please check this thoroughly
 before donors start to register with scheme.
- Parish packs will be prepared at Peninsular House. The number of packs provided initially will be based on declared numbers of regular givers detailed on page two of the registration form. Additional resources can be made available as the need arises (See Section 9 for the Resource Order Form).
- The packs are too heavy to post. It would therefore be preferable for resources to be collected from Peninsular House by a parish member if this is achievable. If there is a member of staff from the

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¹ for verification purposes only

Diocesan Office coming to your local area within an appropriate timescale, then we will do what we can to deliver the resources by hand.

- The individuals who appear on the registration form as Statement Receiver and Project Leader will
 be sent Data Consent Forms if those individuals are not already on our Diocesan database through
 another office they hold. This is to give those individuals opportunity to be included in
 communications to keep up to date of changes and developments.
- The Stewardship Adviser will remain available to parishes for support in implementing the PGS as the need arises.

5 Implementing Parish Giving Scheme in Parish

Organise a Stewardship Programme

In launching the PGS, there is clearly an opportunity for parishes to engage in some 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 on the back of a stewardship programme. More importantly, this provides an ideal opportunity to **encourage** your parishioners in their Christian giving. 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.

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 a 'giving review' to aid the take-up of the scheme.

Resources to help guide you in this process are readily available and summarised in Section 8 of this handbook; do feel free to contact the Stewardship Adviser for more information about running a stewardship programme in your parish.

Collating Resources

On receipt of the packs from the Stewardship Adviser, you will need to prepare the resources ready for distribution and plan the distribution to fit with the planned Stewardship Programme. Each parish will receive at least one of Pack A and Pack B. Larger parishes will receive multiple Packs.

Parish Giving Scheme Pack A

Each Pack A will contain 100 "PGS explained" leaflets and 2 posters for your notice boards.

These PGS Explained leaflets are for enquirers who:

- are wondering about how to support their local church financially;
- might have heard about the PGS and want a little more information;
- have seen the 'tokens' in use.

As such, these leaflets are suitable for leaving at the back of the church or handing to newcomers.

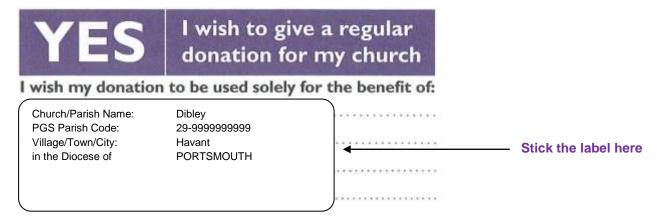
Before you distribute them, please insert the name and telephone number/email address of your local contact in the space on the back. The space accommodates a small label (72x21.1mm; L7665) which you can pre-print with the details.

Before displaying the posters, please insert the name and telephone number/email address of your local contact in the space on the back. The space accommodates a small label (33.9 \times 99.1mm) which you can pre-print with the details.

Parish Giving Scheme Pack B

Each Pack B will contain **24 gift forms**, **24 donor information booklets** and **24 labels** particular to your parish. If you have opted to use the **tokens**, there will be a supply provided also.

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 in the position shown:



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 might want to remind them to cancel their existing standing orders.

Distribution

Gift Forms and **Booklets**, together with an appropriate **covering letter**, should be sent or handed to donors individually.

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 **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.

Experience from our Diocese and neighbouring Dioceses has shown that, if you ask PCC members to adopt PGS first, then others will follow in due course.

If you issue a Stamped Addressed Envelope (either C5 or DL size) addressed to Parish Giving Scheme, Church House, College Green, Gloucester GL1 2LY, you may not only reduce confusion as to where to send the completed form, but also increase the response rate.

Individual Donor Forms need to be sent to the PGS Team in good time; if donors want 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.

Donors should be encouraged to send their forms directly to PGS rather than Treasurers gathering them in and sending them to PGS.

To ensure efficiency and smooth running, the PGS staff request that gift forms are NOT sent in bulk

6 Moving Forward

Stewardship Practices

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. To achieve this, stewardship work will need to continue at parish level.

It is therefore a good opportunity to reflect upon stewardship practices in your parish and ensure that as well as periodic stewardship programmes, there is a process of thanking regular givers (irrespective of the method they employ) and a process of annual renewal. On the diocesan website there is an annual renewal form which can be used with the PGS. There are also some sample letters available for download, and adapted to meet local needs. If you create your own letters which you would be willing to share with others then please do contact the Stewardship Adviser.

For further support in all aspects of Stewardship, please do contact the Stewardship Adviser, Victoria James.

Monitoring Gift Aid

To claim under 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 £800 per tax year. This will still allow your church to claim the full £8000 of GASDS on eligible donations. Please note that claims through the Portsmouth Diocesan Scheme still count towards this.

This shouldn't be an issue for most churches as it is unlikely that all donors will be converted and there will still remain the 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 do not hesitate to contact Victoria James, the Stewardship Adviser.

Administrative Changes

If you have a change to either the **bank account** into which you want the PGS donations transferred or you have a **new Statement Receiver**, then please use the relevant form on the PGS website (**www.parishgivingscheme.org.uk/for-parishes/changes**) and send it directly to the PGS team.

If you do change your **statement receiver**, it would also be helpful if you could let the Stewardship Adviser know so our database can be amended and newsletters and updates reach the correct person.

Need More Copies of the Resources

If you need more gift forms, donor booklets, PGS explained leaflets, tokens or posters then please contact the Stewardship Adviser and not the PGS team as resources are administered locally.

Stewardship Adviser

7

Victoria James

Tel: 023 9289 9655

Email: parishgivingscheme@portsmouth.anglican.org

There is also information available on the Diocesan website:

http://portsmouth.anglican.org/parish-giving-scheme

Parish Giving Scheme Team

Parish Giving Scheme Officer

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

Email: info@parishgivingscheme.org.uk

There is also helpful information available on the PGS website: www.parishgivingscheme.org.uk

Thank you!

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 payment:-

- <u>Giving in Grace</u> Developed and maintained by the Diocese of Liverpool, Giving in Grace offers online all of the resources for running a major program, or for an annual review. Use this link for more detail http://www.givingingrace.org/index.html
- <u>Giving for Life</u> This was developed specifically by the Diocese of Gloucester to dovetail with the PGS. It gives parishes the opportunity to openly discuss the Christian principles of giving alongside looking at churches' needs today. Use this link for more detail but please be aware that some of the resource available are specific to Gloucester and how they implement the scheme locally.http://www.gloucester.anglican.org/parish-life/giving/stewardship
 Generally the relevant resources are:-
 - Liturgical Materials
 - Sample Orders of Service 1, 2 and 3
 - o Example Sermons
 - o All Age Worship Resources
 - Planning Documents
- Rural Giving Programme is designed particularly for smaller, rural churches. This is part of the Stewardship Toolkit for Rural Churches. Use this link for more detail http://www.parishresources.org.uk/rural.htm
- <u>Parish Funding Programme</u> This programme is a complete giving review. There is a full manual and downloadable templates. Use this link for more detail <u>http://www.parishresources.org.uk/giving/pfp.htm</u>
- <u>Give 10</u> seeks to resource those churches that want to teach tithing. Why provide resources for churches to tackle the question of tithing? The answer is that tithing constitutes a rich and holistic biblical model of giving which guides, motivates and underpins the generosity of many Christians in times past and today. Use this link for more detail http://www.parishresources.org.uk/giving/Give10.pdf
- <u>T.R.I.O.</u> This simple stewardship programme is designed to inform members of the congregation about the finances of their church and to encourage them to become more responsible in their giving, by helping them to recognise that, as far as the maintenance of the work, ministry and mission of their church is concerned...The Responsibility Is Ours. Use this link detail http://www.southwark.anglican.org/what/trio



Documents Reproduced here:

- **Frequently Asked Questions**
- **Parish Action Checklist**
- List of church/parish names
- Parish Registration Form