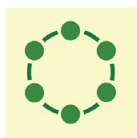


IMPLEMENTATION HANDBOOK — FOR — LOCAL CHURCHES



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PARISHGIVINGScheme



DIOCESE OF TRURO
DISCOVERING GOD'S KINGDOM
GROWING THE CHURCH

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WHY JOIN THE PARISH GIVING SCHEME (PGS)?

The Parish Giving Scheme (PGS) is a direct-debit system originally developed by the Diocese of Gloucester to provide a professional, effective donation management system to support parishes in funding their mission and ministry. It has been adopted as the preferred way of giving by the National Stewardship Committee and soon more than half of our dioceses will be using the scheme. It could be processing annual donations of over £50 million, from around 70,000 donors, and claiming more than £10 million each year in Gift Aid.

The PGS is a charitable company owned by participating Dioceses, including the Diocese of Truro.

WHY SHOULD YOUR PARISH JOIN THE PARISH GIVING SCHEME?

- ✓ You will maximise your cash-flow and minimise your administration
- ✓ You will have inflation-proofed your giving.
- ✓ When people make the switch away from giving by envelope or into the open collection plate, giving levels remain steadier; especially during times when people are on holiday or away from church for other reasons.
- ✓ You will be able to budget and plan more effectively.
- ✓ Using this central system ensures that Gift Aid is processed accurately.
- ✓ Giving via direct debit is the only payment method with a money back guarantee and is therefore safer for donors than standing orders, cheques or cash.
- ✓ The PGS is complimentary to any stewardship programme both at the point it is introduced and in subsequent years.

- ✓ It offers an easy way for givers to amend their donations via a simple phone call or email to the PGS office. They can also opt to be anonymous givers.
- ✓ Professional, tried and tested materials are supplied for donors, and for parish treasurers. Monthly, Annual and Tax year statements are sent to each Parish.
- ✓ There's no direct cost to the parish as the yearly fees are covered by central diocesan funds.
- ✓ As less cash is handled in the church it is safer for the volunteers and their time spent counting and banking the money is reduced.
- ✓ If your bank charges you for banking cash, and many more are thinking of doing this, then a switch towards the PGS will lead to reduced banking fees.

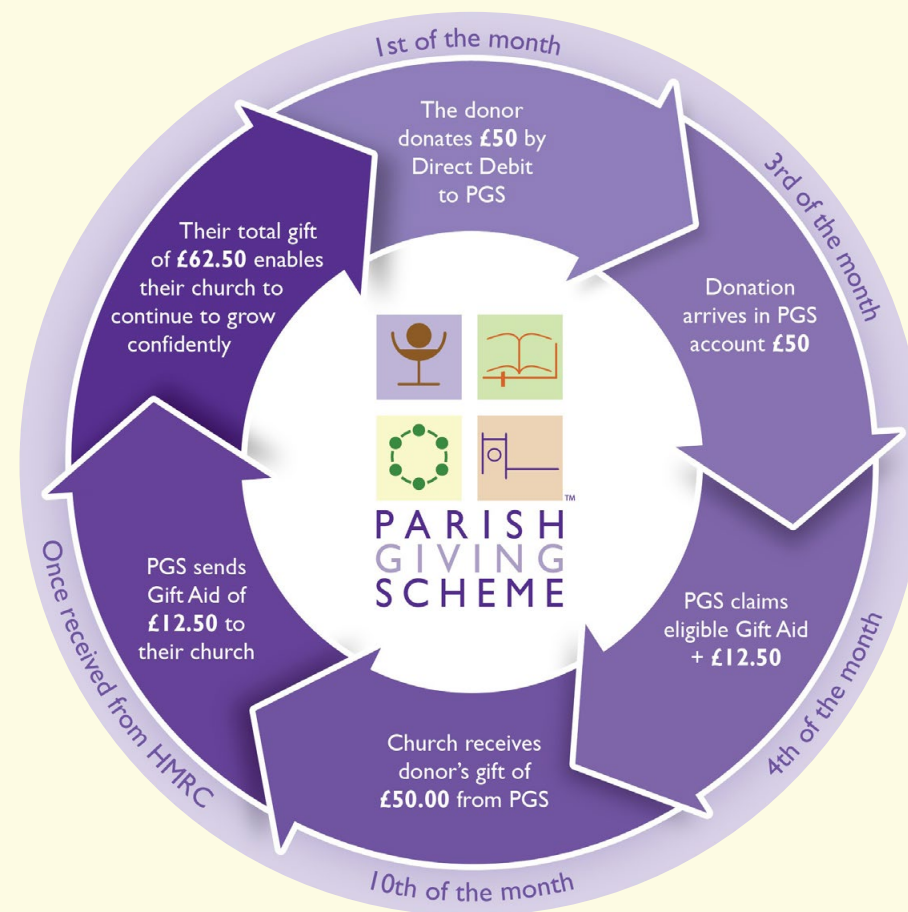
By offering this scheme in a parish and through donors' generous commitments, churches can be assured of a regular, tax efficient source of income which has the capacity to increase with the cost of living, yet involves virtually no administration. With the help of the Parish Giving Scheme (PGS), donors benefit from a system that is secure, confidential and easy to use, while supporting the Church today and for the future. The Parish Giving Scheme is recommended by the National Church as the preferred way of giving

“ We joined the Parish Giving Scheme a year ago and we are very pleased we joined because it has increased our cash flow (no need to wait for the Tax refund), reduced the work of the Treasurer (me) & also the person who deals with the Gift Aid Tax Claim. It's so good to see the monthly credits as one figure, rather than multiple entries”

CAROLINE HOOPER, ST BREWARD TREASURER

HOW DOES THE PARISH GIVING SCHEME WORK?

The donor makes their gift on the 1st of the month. Payment can be made monthly, quarterly or annually by Direct Debit. It goes to the Parish Giving Scheme which then claims the Gift Aid, if eligible, on behalf of the church. The donation is then credited to the church bank account on or before the 10th of each month, and the Gift Aid amount follows within 2 working days of the PGS having received it from HMRC, usually before the end of the month.



MONTHLY REPORT

If you have provided us with an email address you will receive an email allocating you a username and password. Once the first gift is collected your statement on giving will be published on the website on the 10th of each month and will remain accessible for you to view and download for 6 months. 85% of statement receivers access their statements which makes savings on postal, printing and administration costs.

An example of the statement:

Parish name:
Parish reference:
Date of donation:
Claim generated:

Dibley
088-DIBY
1st October 2011
5th October 2011

Transaction Donor Ref	Contact ID	Donation Received	Gift Aid	Total	Freq	Initial
Miss Scarlet	DBF THANK YOU-1158	4032	10.00	2.50	12.50	M N
Rev'd Green	DBF THANK YOU-1150	4023	35.00	8.75	43.75	M Y
Mrs White	DBF THANK YOU-1144	1257	15.00	3.75	18.75	M N
Colonel Mustard	DBF THANK YOU-1598	4591	8.00	2.00	10.00	M N
Anonymous	DBF THANK YOU-1148	4018	40.00	10.00	50.00	Q Y
Prof Plum	DBF THANK YOU-1143	4011	30.00	7.50	37.50	M Y
Lady Peacock	DBF THANK YOU-1264	4988	1000.00	250.00	1250.00	A Y
Anonymous	DBF THANK YOU-1364	5203	25.00	6.25	31.25	Q Y
Dr Black	DBF THANK YOU-1365	5204	25.00	0.00	25.00	M Y
			1188.00	290.75	1478.75	

Joiners (Contact ID)

Leavers (Contact ID)

5203

3988

5204

Key: Freq = Frequency

M = Monthly

Q = Quarterly

A = Annual

Inflat = Annual Gift Inflationary Increase

Y = Inflationary increase

N = No inflationary increase

The PCC Treasurer or Gift Aid Secretary will be able to access a monthly statement. Note that in the example above, some donors have chosen to remain anonymous.

STATEMENT RECEIVER CONTACT DETAILS

If you change statement receiver, complete the form which can be downloaded from www.parishgiving.org.uk/for-parishes/changes. Alternatively contact the PGS by phone or email.

PGS TOKENS

Some donors, particularly those who previously gave by envelope or via open plate, still like to put something on the plate during the service. We therefore provide PGS tokens which can be placed on the plate or in the collection bag. This indicates that the donor participates in PGS and enables them to express an act of offering during the course of worship. Tokens, if included in the offering, may be received and blessed by the priest or minister with the rest of the collection.

After the service the tokens should be separated out from the rest of the money and stored somewhere safe until the next occasion a collection is taken, when they should be made available to worshippers who like to use them.



An example of a PGS token front and back.

WHAT DOES THE CHURCH NEED TO DO?

1. PASS A PCC RESOLUTION

As this scheme is introduced, donor money will start to flow to the PCC through the PGS, rather than directly from the donor to the church. It is important therefore that the trustees of the local church pass and minute a resolution. It can be as simple as:

“We the PCC of agree to commence operation of the Parish Giving Scheme.”

Aide-memoire:

Write here the date the PCC resolution was passed

2. REGISTER YOUR CHURCH

Request a Church Registration Form from the PGS Team at Church House, Truro.

Tel: 01872 360039 | Email: pgs@truro.anglican.org

One side of the form collects data about church officers and destination bank account details. The other side asks for some statistics about your current patterns of giving to give us a base from which to measure the effectiveness of the scheme in future.

3. RETURN YOUR FORM

Once complete with the three signatures required return to PGS, Church House, Woodlands Court, Truro Business Park, Threemilestone, Truro TR4 9NH

The top form is the 'Parish Giving Scheme' registration form. It includes the PGS logo and the title 'PARISH GIVING SCHEME'. Below the title, it states: 'The purpose of this form is to provide the PGS with Parish bank information and Parish contact details to enable your Parish to participate in the Parish Giving Scheme.' The form is divided into four main sections: 'PARISH DETAILS', 'CONTACT DETAILS', 'BANK DETAILS', and 'SIGNATURES'. The 'PARISH DETAILS' section includes fields for Church Name, City/Town/Village, PGS Parish code, and Diocese. The 'CONTACT DETAILS' section includes fields for Overall project leader, Treasurer, and PGS Statement Receiver, each with Title/Name, Address, Contact number, and Email address. The 'BANK DETAILS' section includes fields for Parish or Church bank details, Name of Account, Bank name & Address, Sort code, and Account number. The 'SIGNATURES' section includes fields for Signed and verified, Treasurer (sign), Incumbent (sign), and Church warden (sign), each with print name and date. The bottom form is the 'Parish Giving Scheme' return form. It includes the PGS logo and the title 'PARISH GIVING SCHEME'. Below the title, it states: 'The purpose of this form is to provide the PGS with Parish bank information and Parish contact details to enable your Parish to participate in the Parish Giving Scheme.' The form is divided into four main sections: 'PARISH DETAILS', 'CONTACT DETAILS', 'BANK DETAILS', and 'SIGNATURES'. The 'PARISH DETAILS' section includes fields for Church Name, City/Town/Village, PGS Parish code, and Diocese. The 'CONTACT DETAILS' section includes fields for Overall project leader, Treasurer, and PGS Statement Receiver, each with Title/Name, Address, Contact number, and Email address. The 'BANK DETAILS' section includes fields for Parish or Church bank details, Name of Account, Bank name & Address, Sort code, and Account number. The 'SIGNATURES' section includes fields for Signed and verified, Treasurer (sign), Incumbent (sign), and Church warden (sign), each with print name and date.

Please complete and post this form to:
Parish Giving Scheme, Church House, Woodlands Court,
Truro Business Park, Threemilestone, Truro TR4 9NH.

Aide-memoire:

Write here the date the Church Registration Form was sent to Parish Giving Scheme, Church House, Woodlands Court, Truro Business Park, Threemilestone, Truro, TR4 9NH

WHAT WILL CHURCH HOUSE DO?

On receipt of the Church Registration Form we will send or deliver to you some PGS materials. If you need further materials, they can easily be provided.

BOOKLETS: 'Giving – A Simple Guide'. This booklet explains how giving is an outward manifestation of our faith. We have an abundantly generous God. Generosity is part of our discipleship, it's how we make a difference in the world and it's an indication of the vibrancy of our Christian communities.



A better way to help your local church leaflet

Giving – A Simple Guide booklet

LEAFLETS: 'A better way to help your local church'. These are designed to introduce the scheme to parishioners, to tell them the principal benefits, what is involved and to answer questions they might have. We have tried to keep this informative but relatively simple. You can give these to people as part of your stewardship conversations, but you can also leave them out at the back of the church for people to look at and take away. Please remember to put local contact details on the back so people know who to approach if they want to know more, and from whom they can get the PGS Gift Form.

PGS GIFT FORMS These will be sent to you with a stock of labels already printed and coded for your parish, so you can be sure that donations are correctly allocated to your church.

PGS TOKENS As previously explained, some people like to be able to place something in the collection bag or plate during a service, especially if they are used to giving an envelope or cash, and PGS tokens serve this purpose.

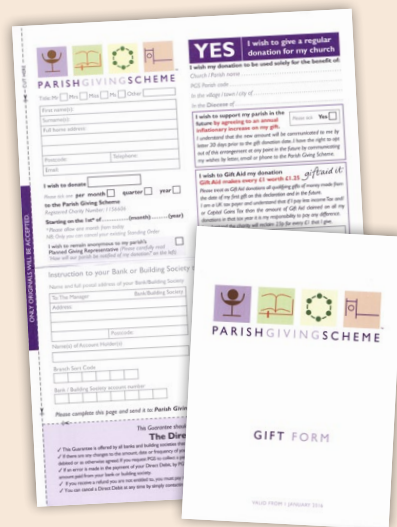
ASSISTANCE AND ADVICE If we have not already spoken with you we will get in touch to discuss how you are going to promote the Parish Giving Scheme to your church members and to help you think about the options for stewardship schemes.



WHAT DOES THE DONOR NEED TO DO?

All the donor needs to do is complete a Gift Form, post it to the PGS team and then cancel their previous method of giving to the church. One of the benefits of a Direct Debit scheme is that an inflationary increase can be automatically applied each year if the donor desires.

The donor needs to decide whether or not they would like to opt into this inflationary increase when they fill in the form. Even if they opt in at this stage, they will have a further opportunity to accept, cancel or increase further the annual increase when they receive the annual review letter. This will be before any increase is made so they remain in complete control of the amount they give and are able to alter this at any time.

The image shows two overlapping forms. The top form is the 'PARISH GIVING SCHEME' form, which includes sections for 'I wish to give a regular donation for my church', 'I wish to support my parish in the future by agreeing to an annual inflationary increase on my gift', and 'I wish to opt into the Gift Aid scheme'. The bottom form is the 'GIFT FORM', which includes a section for 'I wish to give a regular donation for my church' and 'I wish to opt into the Gift Aid scheme'. Both forms have checkboxes for 'Yes' and 'No' and include fields for name, address, and contact details.

Example of the Gift Aid form

“... 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

USEFUL HINTS AND TIPS

ORGANISE A STEWARDSHIP PROGRAMME In launching the PGS there is clearly an opportunity for parishes to engage in some form of initiative at the same time. Experience from other parishes has revealed 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 occasion to encourage your parishioners to review their Christian giving.

As with any well thought out 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.

If you have engaged in a stewardship programme within the two years prior to the launch of the PGS you might prefer to simply offer the PGS on the back of some form of ‘giving review’ to aid the take-up of the scheme.

Please contact the PGS team on **01872 360039** or email pgs@truro.anglican.org for more information, help and tips to do with running a stewardship programme in your parish.

LEAD BY EXAMPLE It will almost certainly be helpful for some PCC members

to join the scheme first, so that when you launch in the wider church, a couple of local people are able to share their experiences of how easy it was to join.

MAKING THE CHANGE It is easy for those who currently give by standing order to move across. The PGS represents more of a change for envelope givers, although churches using the scheme have found that many are willing to do so when they understand the benefits – they don't have to hunt around for the cash, there is a smaller amount of cash to be counted and banked, treasurers' and/or church administrative time is saved and the church doesn't need to buy or make special envelopes. However, it may be helpful to explain this to people on a one-to-one basis.

STAMPED ADDRESSED ENVELOPES HELP 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 reduce confusion and increase the response rate.

ORIGINAL GIFT FORMS REQUIRED Please do not photocopy the actual donor forms: their design has been agreed with the PGS bankers and photocopies will not be accepted by the PGS office. **More forms are available from Church House, Truro.**

HOW LONG WILL IT TAKE? PGS Donor Forms need to be in the hands of the PGS administration centre in Gloucester by the 15th of the month preceding the month of the first direct debit collection, to allow time for processing the form and setting up the direct debit. We ask donors to allow a month, and we ask you NOT to collect forms in centrally in the parish and send them off together as this can create delays.

REMINDER TO CANCEL STANDING ORDERS Donors will need to be reminded to cancel existing standing orders to the local church.



FAQ'S

Q Why can't we photocopy the Gift forms?

A The Parish Giving scheme needs to be able to demonstrate version control and reduce risks of circulating old version forms or out of date information. The PGS gift form contains useful information which is intended for the donor to read and hopefully reduce operational queries received by the small PGS admin team. There is a risk that this information would become detached from the donor detail and mandate page if it is copied. The PGS is a direct debit originator with an approved service user number (SUN), we are only authorised to accept written direct debit mandates; an additional verification software package (with a cost) would be required to collect mandates via another source. That said, this is another functionality we are exploring.

Q How do I communicate with an anonymous donor?

A The PGS is happy to forward any generic communication such as a 'thank you' message to anonymous donors on your behalf; all you need to do is send us your communication, together with a stamped envelope and PGS contact number. PGS will add the address and send it to your anonymous donor/s but does not have the resource available to personalise each letter with individual donor information.

Q We have couples of want to donate – how does this work with Gift Aid?

A We welcome gifts from couples. However, for the purpose of Gift Aid we only require one signature, title and initials on the Gift Aid declaration. The signature must be from the eligible individual who pays sufficient tax to cover the gift. To ensure compliance with HMRC guidelines, please encourage donors to notify us immediately if there is any change to their Gift Aid eligibility. If a donor is unsure of whether or not they are eligible to claim Gift Aid please suggest that they do not sign a Gift Aid declaration. It is easier for PGS to back date a Gift Aid claim at a later date and make an extra payment to the Parish rather than request Gift Aid claimed in error back from the Parish and then refund it back to HMRC.

CONTACT DETAILS

Here are the contact details for any questions you may have about Parish Giving Scheme (PGS):

NOT YET REGISTERED

If you are wondering about registering or have any other questions, please get in touch with:

The PGS Team | Tel: **01872 360039**

Email: **pgs@truro.anglican.org**

ALREADY REGISTERED

If your church is already registered with PGS and you require further copies of the materials, or advice about stewardship:

Email: **pgs@truro.anglican.org** | Tel: **01872 360039**

If you have queries relating to donors, donations and parish statements, please contact the Parish Giving Scheme office below:

PGS Office, Gloucester | Tel: **0333 002 1260**

Email: **info@parishgiving.org.uk** | Web: **www.parishgiving.org.uk**

Advise donors they can make changes simply by phoning or emailing the PGS office.

PLEASE NOTE

To save confusion and paper only the nominated project leader and or treasurer/Giving Officer needs to have a copy of this booklet. However, if someone within your parish specifically requests further information please direct them to the downloadable version of this leaflet on our website:

<http://www.trurodiocese.org.uk/mission/stewardship/parish-giving-scheme/>