



Parish Giving Scheme
Implementation Handbook for Parishes
2018/19

PGS Benefits

The Church

- Increased and improved cash flow, through automatic recovery of Gift Aid.
- Combats static giving as majority of donors choose to index-link their gift.
- Professional central system ensures that Gift Aid is processed accurately.
- No charge to join and all promotional materials are free.
- Opportunity to engage people in thinking about their financial generosity.

The Volunteers

- The scheme is delivered locally but administered centrally.
- Reduced administration, paperwork and shorter bank statement.
- Time and energy saved as less money needs to be counted.
- Time and energy saved in submitting Gift Aid claims and account reconciliation.

The Giver (Donor)

- Quick and easy to join and the donor remains in total control of their giving.
- Customer Support Team available to help: Monday to Friday 9am – 5pm
- Simple giving method that means regular support to their church.
- Option to increase their giving annually by index-linking their gift.
- Donors are protected by the Direct Debit Guarantee.
- Tokens are available to represent giving on the open plate.

Contact Details

Registration

We have recently setup a PGS mailbox to accommodate the growing number of parishes signing up to PGS in the Diocese. For general queries and guidance please get in touch with:

Email: pgs@cofesuffolk.org

Alternatively, you can contact our PGS team directly:

Julie Podd, PGS Adviser

Tel: 01473 298555

Email: julie.podd@cofesuffolk.org

Lee Jukes, Stewardship Manager

Tel: 01473 298551

Email: lee.jukes@cofesuffolk.org

Already Registered

If your church is already registered with PGS, please contact:

- Diocesan PGS Team, at the above address if you would like further copies of the materials, or advice about stewardship.
- The Parish Giving Scheme Office at the address below for queries relating to givers/donors, donations and parish statements:

PGS Office, Gloucester

Tel: 01452 835595

Email: info@parishgivingscheme.org.uk

<p>To save confusion and paper only the nominated Project Leader and or Treasurer/Giving Officer needs to have a copy of this booklet.</p>

Introduction to the Parish Giving Scheme (PGS)

Why are we adopting Parish Giving Scheme?

We were aware that many treasurers and PCCs wanted something that would help them with their church finances. It needed to be easy to promote, **free**, would address static levels of giving and allow church members the opportunity to engage in thinking about their own level of financial generosity.

The Parish Giving Scheme (PGS) meets these requirements and is an opportunity for you to share with your church council and church members an exciting new resource for planned giving. It is a tried and tested scheme that allows donors (givers) to donate to their church by regular Direct Debit payments. It is the only payment method with a money back guarantee and is therefore safer for the donor than Standing Orders, cheques and cash.

It has been found to be a simple method of giving, the gifts/donations are reliable and regular, helping churches plan for the future. Giving is reviewed annually with the donors and with the donor option for an inflationary increase, church income should increase year on year.

If envelope givers and open plate givers also join the scheme, giving levels have been found to remain steady, especially during times when people are on holiday or away from church.

As less money is handled in the church, it is safer for the volunteers and their time spent counting and banking the money is reduced. Bank charges may reduce as well.

As more and more donors switch to the PGS, it will save many hours of administrative time at local church level. Gifts/donations are much easier for the Treasurer (or Gift Aid Secretary) to reconcile than standing orders or cash. It will improve cash flow, since Gift Aid is added each month by the PGS team.

You will be kept up-to-date with the amount of the payments and Gift Aid paid to the church with a monthly report showing names and amounts for each donation, except where the donor has chosen to remain anonymous. Annual statements allow you to quickly see the whole amount given, useful for annual "thank you" letters.

The Diocese of St Edmundsbury and Ipswich Board of Finance is paying the one off set up cost to participate in the Parish Giving Scheme. The DBF will meet the on-going annual costs. There are **NO** direct additional costs to a participating parish.

Tried and tested scheme

PGS started life in the Diocese of Gloucester. It has been running there since 2009. Their experience is that it enables significant increases in giving to support the local church. In October 2012 two other dioceses - Winchester and Chichester joined the scheme. In 2014, PGS became a not-for-profit charity and with over eighteen Dioceses now members of the scheme, it is the Church of England's preferred method of giving.

Planned Giving by Direct Debit - Gift Form

Once your parish has registered, the donor simply needs to complete the Gift Form and post it to the PGS Office (not the Diocesan Office) and then cancel their previous method of giving to the church.

Completed Gift Forms should be sent to Parish Giving Scheme, Church House, College Green, Gloucester GL1 2LY

Being a Direct Debit scheme, **if the donor agrees** to the optional inflationary uplift it can be automatically applied each year. This has already been taken up by the majority of givers in other dioceses and is a significant part of the Parish Giving Scheme.

Gift Form with the option of opting in to the automatic inflationary increase

The donor will decide whether they would like to opt into the 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 sent on the anniversary of the start of their giving and before any increase is made so all donors are in **complete control** of the amount they give.

PARISH GIVING SCHEME

Title: Mr Mrs Miss Ms Other

Name(s): _____
Address: _____
Postcode: _____ Telephone: _____
Email: _____

I wish to donate _____
Please tick one: per month quarter year

to the Parish Giving Scheme
Registered Charity Number: 251234
Starting on the 1st* of (month) (year)
*Please allow one month from today
NB: Only you can cancel your existing Standing Order
I wish to remain anonymous to my Parish Treasurer

YES I wish to give a regular donation to my church

I wish my donation to be used solely for the benefit of:
Church / Parish name
In the village / town / city of
Belonging to the Diocese of

I wish to support my parish in the future by agreeing to an annual inflationary increase on my gift. Please tick Yes

I understand that the new amount will be communicated to me by letter 30 days prior to the gift donation date. I have the right to opt out of this arrangement at any point in the future by communicating my wishes by letter to the Parish Giving scheme.

I wish to Gift Aid my donation
Gift Aid makes every £1 worth £1.25 *giftaid it*

By signing below I confirm I am a UK Tax Payer and would like the Parish Giving Scheme to reclaim the tax on all donations I have made, as well as on my future donations.

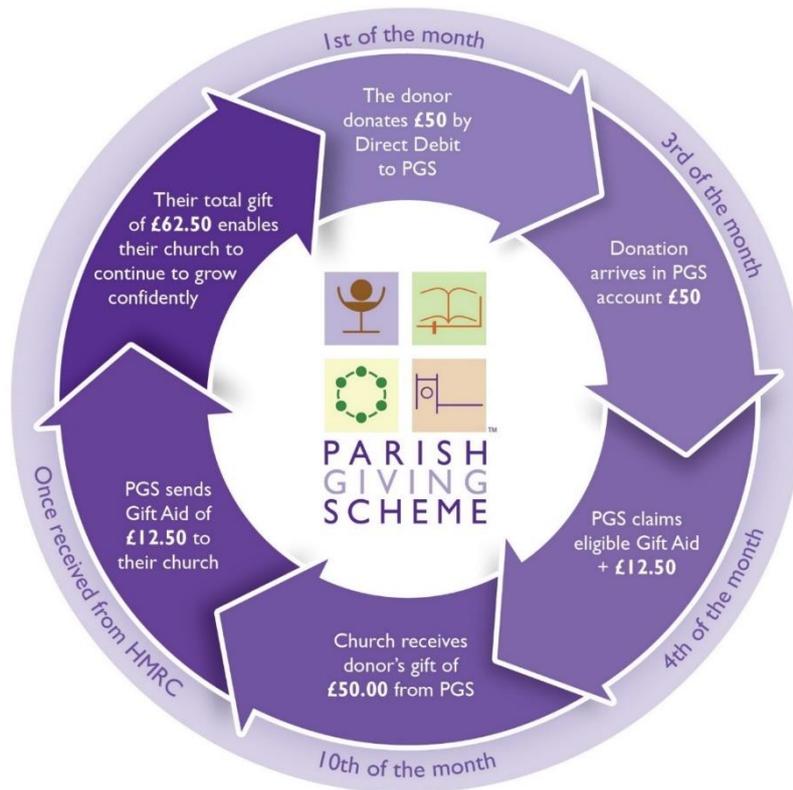
Signature _____ Title: _____

I understand that I must have paid an amount of income tax or capital gains tax at least equal to the amount of tax the charity will claim in

NOTE: Please don't photocopy the donor gift forms! The design has been signed off by the PGS bankers and photocopied versions of these forms will not be accepted by those whom administer the PGS. Our Diocesan PGS Team can supply you with as many original donor Gift Forms as you need.

How does Parish Giving Scheme work?

The donor gives their donation of money to the PGS on the 1st of each month, and it is credited to the church bank account on the 10th of each month – or the subsequent working day. The eligible Gift Aid monies that have been claimed on behalf of the church by the PGS team are remitted as soon as they have been received.

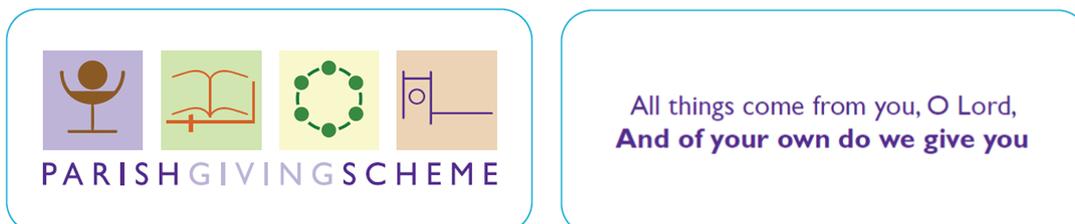


PGS Monthly Cycle

Donations can be received monthly, annually or quarterly by Direct Debit and this removes the necessity for donors to give money during a service. However, we are aware that some donors, particularly those who previously gave by envelope or via open plate, would still like to put something on the plate each service.

We therefore provide PGS tokens, which can be placed on the plate or in the collection bag. This indicates they participate 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 they should be separated out from the rest of the money and stored somewhere safe until the next occasion a collection is taken, when they're made available to church members who like to use them.



An example of a PGS token front and back, actual size.

Planned Giving – Monthly Reports

Each month the nominated Statement Receiver from the church, as named on the registration form, will receive details of each donor's giving via the PGS including the total of the monies due to be paid into the bank account. A username and password will be sent for the PGS online portal, which be accessed at the bottom of the PGS website's homepage. The below image is how the monthly statements will appear once they have been downloaded from the portal.

Parish name: Dibley
 Parish reference: 088-DIBY
 Date of donation: 1st October 2011
 Claim generated: 5th October 2011

Transaction Donor Ref	Contact ID	Donation Received	Gift Aid	Total	Freq.	Inflat.	
Miss Scarlet	DBF THANK YOU-1158	4032	10.00	2.50	12.50	M	N
Revd 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	Y
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 5204	3988

Key: Freq = Frequency	M = Monthly
	Q = Quarterly
	A = Annual
Inflat = Annual Gift Inflationary Increase	Y = Inflationary increase
	N = No inflationary increase

Note that in the example above, some donors have chosen to remain anonymous.

At the end of the financial year and also at the end of the tax year a statement of all the monies given for each individual will be sent to the nominated person in church. This can be used to send out your annual thank you letters. If you have any anonymous donors a generic letter can be sent to the PGS team who will forward it to the donor.

Each giver to the scheme who has agreed to increase their giving each year by the inflationary increase will also be sent a letter on the anniversary of their gift. They can amend or cancel their giving at any time, the giver is in total control of their giving.

What does our church need to do?

Pray

Seek God's guidance before you make any significant decision affecting your church.

Consult Resources – Pass PCC Resolution

A power point presentation is available if required to allow you to present the information and benefits of the PGS to the PCC/DCC. There is also a simple leaflet explaining the scheme to the church council Since some donor money will flow to the church through the Parish Giving Scheme, rather than directly from the donor to the church, it is important therefore that the local church council pass and minute a resolution.

Church Registration

Use the form at the end of the booklet to register your church. The front of the form is required and collects data about church officers and destination bank account details. The reverse side asks

for some statistics about your current patterns of giving, to give us a measure of the effectiveness of the scheme. **Please attach a blank paying in slip to ensure correct details are used.**

Assemble a Team

The PCC should now fully understand the Parish Giving Scheme. You may find that you need a small team to help you run a stewardship programme (if applicable) and also to ask the congregation individually to join the PGS scheme. Either you or someone else will need to be the Project Leader. This is someone who can co-ordinate all the necessary activities, how and when to contact each member of your church and work with the wider PCC to maximise PGS uptake.

What the Diocesan Office will do when you register

On receipt of the Registration Form the Diocesan PGS Team will contact you to discuss how you are going to promote the Parish Giving Scheme to your church members and the number of Gift Forms required.

We will then arrange for a stock of free PGS gift forms and free PGS tokens, if required, to be delivered to you. The Gift Forms will be personalised with your churches PGS reference number.

Please do not photocopy them, if you need any more forms let our PGS Team know.

Useful Hints & Tips

- Experience so far has shown that, if you ask council members to adopt PGS first, then others will follow in due course, best to hand deliver the information to the congregation rather than leaving at the back of the church.
- If you issue a stamped addressed envelope; Parish Giving Scheme, Church House, College Green, Gloucester GL1 2LY, you may reduce confusion and increase the response rate.
- 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 at the very latest. This is 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 centrally in the parish and send them off together, as this can cause delays.
- Donors will need to be reminded to CANCEL existing Standing Orders to the local church. Ideally, donors will keep existing Standing Orders going until the month before their first Direct Debit collection date.
- Some parishes have raised the question as to how joining PGS impacts on eligibility to claim under the Gift Aid Small Donations Scheme (GASDS). To claim maximum gift aid via GASDS a church needs to have received gift aided donations in the relevant tax year of £800 or more. Gift Aid donations made through the PGS do not count towards the latter. As such, it is important to retain non-PGS gift aid giving (envelopes, standing orders) proportional to the GASDS you are seeking to claim on. For example, if you typically claim on £4,000 of GASDS eligible donations you will need to ensure that at least £400 of non-PGS gift aid is claimed in your parish.



Please **post to PGS Team, Diocesan Office, Cutler Street, Ipswich IP1 1UQ** together with a **paying in slip**, for verification purposes.

CHURCH REGISTRATION FORM

Church Name:	
City/Town/Village:	
Church code:	(to be completed by the diocese)
Diocese:	St Edmundsbury & Ipswich

CONTACT DETAILS

Parish Project Leader. Title/Name:	
Address:	
Contact number:	Email address:
Treasurer. Title/Name:	
Address:	
Contact number:	Email address:
PGS Statement Receiver. Title/name:	
Address:	
Contact number:	Email address:

BANK DETAILS

Parish or Church bank details (please attach a copy of your paying in slip)	
Account Name:	
Bank Name & Address:	
Sort Code: / /	Account Number:

Treasurer (sign)Print Name:Date:

Incumbent (sign)Print Name:Date:.....

Churchwarden (sign).....Print Name:.....Date:.....

Statistics – Stewardship & Giving

1) Do you plan to use PGS Tokens? YES/NO

2) Please tick the giving programme you are planning to use alongside the implementation of the Parish Giving Scheme:

Giving in Grace		Simple Giving Programme		Other	
Giving for Life		Generous God, Generous People		We have run a giving programme in the last two years	

3) When do you hope to run your stewardship programme and/or begin using the PGS as a method of payment? Month..... Year.....

4) Number of all regular donors/planned givers

5) Number who have signed a Gift Aid Declaration.....

6) Please provide us with:

Method of giving	Number of weekly givers	Number of Monthly givers	Number of Quarterly givers	Number of Annual givers
Standing Order				
Envelope				