



How to ...

Review Giving Annually

What is an annual giving review?

The Church of England recommends that a PCC carries out an annual stewardship review. This enables the PCC to check that the parish is following good practice in areas of stewardship such as gift aid and legacies. It may well also provide you with an action plan of things to consider changing or introducing.

They also recommend that congregations have an opportunity to review their giving each year.

Why are annual giving reviews important?

- It's an opportunity to say "thank you" to those who are giving generously;
- It enables the church to explain what people's gifts are being spent on, and why they are needed;
- It allows people an easy opportunity to increase their gift (or indeed decrease if circumstances have changed).

What if people are concerned that the church is "talking about money all the time"?

- The advantage of an annual giving review is that it puts stewardship on the annual calendar, and it becomes part of the culture of the church - people grow to expect it. Many people are used to annual pay reviews, and budgeting cycles, so an annual review is an appropriate timescale for people to reconsider their giving.
- Giving is essential to our discipleship, and part of our response to God's love. 2 Corinthians 8:7 says *'But since you excel in everything--in faith, in speech, in knowledge, in complete earnestness and in the love we have kindled in you --see that you also excel in this grace of giving.'* Jesus himself said *'For where your treasure is, there your heart will be also.'* We want to Christians dedicated heart and soul to the kingdom of God, and when they invest their time and money we pray their heart will follow.
- Giving is a joy! As Paul says in Acts 20:35 *"I have shown you in all things that by working hard in this way we must help the weak, remembering the words that the Lord Jesus himself said, 'There is more happiness in giving than in receiving.'"* It is our desire that congregation share in this joy. An annual giving review is therefore, as much as anything, a celebration of God's goodness to us, in allowing us to bless and be blessed by others.
- The Bible has a lot to say about money! It is something God wants us to think about as part of our discipleship. And Jesus himself spoke a great deal about money.

When is the best time to carry out a giving review?

This will of course depend on your church context, calendar, culture and plans, some logical suggestions would be:

- Spring - to tie in with the end of the financial year;
- Harvest - can be a natural opportunity to say "thank you";
- A month or two before the time of deciding your annual budget;
- Having just put your annual budget together – so you can show a good financial case for why the giving is needed.

Who should make the request?

- It is vital that the incumbent provides a strong lead to the church's stewardship activities, and ensures there is good teaching on Christian giving, and a Christian response to materialism;
- The best person to do 'the ask' is often the person who can inspire people with the vision, and speak with real enthusiasm about the privilege of giving. This isn't always the incumbent, and it isn't always the treasurer;
- A larger church may have a team of people who can help plan out what is needed if there are multiple congregations that need to receive the same information.

What might be a helpful timetable?

1. A month or two before the review of giving, carry out a [PCC stewardship review](#);
2. Just before, preach on giving, perhaps run a small group course on stewardship;
3. Two weeks before, make sure you have enough regular giving and gift aid forms/envelops;
4. The week before, you may wish to write thank you letters to all your regular givers, and give them any necessary forms to fill in and bring back on the day. Some churches hold a special event, such as a cheese and wine or pudding evening to thank regular givers;
5. On the day,
 - a. Say thank you and share the highlights of mission and ministry from the previous year;
 - b. Explain the vision for the future the financial need associated with this;
 - c. Make a specific request: e.g. 10 people to give £5 a week more and 5 people to give £20 a week more;
 - d. Give **everyone** a response form (or a new pledge form). Explain very clearly what you need people to do, and *how* to respond. If you can, give people the chance to respond immediately with a revised pledge form if your congregation gives by Direct Debit (e.g. PGS). The response form should allow everyone to respond, even if it is with a 'not able to increase at the moment' answer;
6. Follow up a week after with those who have not given a response, and thank those who have responded positively;
7. Two weeks after – let the church know the results of your annual giving day and give thanks to God for His provision and givers for their generosity.

Reasons for regularly asking for a gift to be reviewed

1. **The effect of inflation**

If someone was giving £40 a month in the year 2000, by the year 2015 this would have had to have increased to £60 a month simply to have kept pace with inflation. So at the very least, we need to ask people to increase their gift in line with inflation.
2. **Increased needs**

As the church grows, the needs increase. General costs increase and across the Diocese, we need to increase investment in training ordinands as other clergy retire.
3. **Change in income**

As people change jobs or progress in their career, their earnings may be increasing beyond inflation. With the convenience of regular giving, it is easy for the years to slip by whilst not considering what the appropriate level of giving might be in new circumstances.

What resources are available?

- [Sermons and other resources](#) available from Parish Resources;
- 'How to...' guide: ['How to... encourage generous giving in our church?'](#);
- The Diocese of York has put together some [stewardship prayers and readings](#);
- Churches in the Parish Giving Scheme can access [a simple pledge increase form](#) which can be adapted for local use.

If you have spent time creating stewardship resources for your church we would be grateful if you were willing to share them with our [Giving and Resources Adviser](#) so that we can make them available to others as examples.

Other things to consider

The [Parish Giving Scheme](#)?

Have you joined the Parish Giving Scheme?

- **YES!** That's great. The PGS has an option that allows people to add an automatic inflationary increase on to their gift. But the danger is that people may then think 'job done' and never review their gift. Action: Provide increase forms
- **NO!** Do you have a well-established Direct Debit scheme in place instead? If not, the PGS has big advantages in saving admin time and costs. An annual giving review is a fantastic time to introduce the scheme. Action: visit www.Bristol.anglican.org/pgs to find out more and register.

One off gifts

You may wish to consider inviting people to give an additional one-off gift, as well as reviewing their annual giving. This may be especially appropriate in a context where people may be receiving an annual bonus, or value taking a retrospective look at their personal finances and giving over the previous year to inform their full giving for the year.

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