

## ONLINE GIVING A BIG HIT FOR MANY CHURCHES

How to continue to receive donations when Church buildings have been closed during the recent lockdown restrictions has been a big issue across our Diocese.

Thankfully, a number of options became available for Churches to set up in a simple and straightforward way, whilst also recording digital Gift Aid declarations at the same time. The Gift Aid Lite team have been working closely with two providers, Data Developments and easyfundraising, whilst also highlighting the options available via Parish Buying and Parish Resources.

For those Churches who are Gift Aid Lite members, a donate now button can be added to your web and A Church Near You (ACNY) sites. The

donations are automatically imported into My Giving Online and are claimed using Gift Aid. If the donation is from someone who is a regular donor it will be added to their record and claimed using their declaration, if one is present. There is no monthly platform fee to pay, but each transaction has a fee of 1.9% plus 20p.

easyfundraising also provides a donation now button that can be added to your web and ACNY sites. They capture digital Gift Aid declarations that can be used to make a claim in your usual manner. The donations will also need to be manually inputted or imported into the software you normally use. Again, there is no monthly platform fee to pay, but each transaction has a fee of 1.4% plus 20p.

Other alternatives are available, and they can be accessed via the Parish Buying and Parish Resources website. A detailed comparison of the [different options are available here](#). Please be aware of that some providers are charging monthly membership/platform fees, which could prove more costly in the longer term.



*Data Developments' and easyfundraising's donation buttons look like this.*

## ACCEPTING DONATIONS IN REOPENED CHURCHES

Now Churches are reopening following the lockdown period, it's important to consider how to enable giving safely within our buildings. National Church and The Diocese of York has produced some helpful points to consider, which are included and adapted below:

**Encourage regular giving** - include a downloadable Standing Order form on your website, sign up to join our Regular Giving/Direct Debit scheme

**Explore Contactless options** - these are accessible and safe, minimising contact, and the donations go straight to your bank account. Please place hand sanitisers close by and cleaning wipes to clean the screen between donations. Gift Aid Lite can help and support with this, or have a look at Parish Buying's recommended suppliers.

**Use QR codes** - donors use a phone to scan a square bar code, which takes them to an online donation page. We have a guide which explains

how to set them up.

**Precautions for cash** - It is important to say that handling cash increases the risk of infection. In view of this, we do not recommend promoting cash giving, particularly as all other forms of giving pose much less risk. If you are going to accept cash donations, make sure you have assessed the whole process, including thinking of those who will be counting and banking the money, and so will be exposed to risk. For those people, provide appropriate precautions including gloves and hand sanitisers.

**Promote your Church's work** - tell your visitor's about what their giving supports your Church to achieve in your local community. Use your noticeboards and images effectively to tell your story.

**Say thank you** - please display thank you posters close to your donation points. This is easy to do, but means a lot!

# VIRTUAL AND ONLINE FUNDRAISING

Even as the lockdown restrictions are easing, social distancing will still make it difficult to physically meet for social events with our church communities. So, why not organise some virtual fundraising or online events?

These can be a great way for Churches to raise money creatively and offer people an easy way to support their local Church. You can also have some fun and see some friendly faces. Please see below for some fun ideas for virtual fundraising events which have been collated by The Church of England's National Giving Team:

## 1. Online Giving

Any Church organising a virtual fundraiser, or during online services, will need to be able to process donations online, and have online giving set up. For details about how to do this, see our section on [online giving](#).

## 2. Event

Here are a few ideas...

- **Virtual Quiz:**

With virtual quizzes becoming a popular way to connect with friends at the moment, why not try organising a virtual quiz to fundraise? You could ask people to make a small donation to take part and offer a prize to incentivise sign ups.

- **Sponsored Event:**

From people running half-marathons in their gardens to Captain Tom walking 100 lengths, people are finding imaginative ways to undertake sponsored exercise during lockdown. Virtual relay walks or runs can be a great way for groups to fundraise collectively; for example, four people might ask for sponsorship to symbolically walk the distance from Land's End to John O'Groats between them over a set period of time. The vicar of St John the Evangelist in Hurst Cross, Revd Liz Devall,

is undertaking a [300-mile walk](#), functioning as a virtual pilgrimage, to raise money for her church.

- **Virtual Tour:**

We love Newcastle Diocese's idea of offering a [virtual tour](#) of Church buildings, in exchange for a donation. This could also be coupled with a short talk about the Church's history.

- **Virtual Treasure Hunt:**

How about organising a virtual treasure hunt? As with a virtual quiz, participants could make a small donation to take part, with a prize on offer for the winner. The person organising could come up with a series of interesting things available to view on Google Maps Streetview, coming up with clues for participants to crack.

- **Virtual Balloon Race:**

St Thomas' Church in Oldham is hosting a [virtual balloon race](#) to raise money for repair work on their church tower.

## 3. Hosting

Please think carefully about which platform will be best to use for your event (e.g. Zoom, Microsoft Teams, Google Meet) and whether you will need a license for the capacity and expected duration. You can find more guidance on which platform is best for you [here](#).

## 4. Promotion

Whatever your Church decides to do, don't forget to encourage to promote your fundraising activities, which could be through your email newsletter, local press, social media, and your web and A Church Near You pages.

**If you are thinking about any of the above, please contact the Gift Aid Lite for advice on how to do this effectively, and in a tax efficient manner.**

# PROMOTING ONLINE DONATIONS

Approximately, 50 Churches have set up new accounts to accept online donations during the lockdown period. Many more have also added the ability to accept online donation to their existing easyfundraising accounts.

However, the feedback we are receiving from our suppliers is showing that some Churches have not activated their new accounts after setting them up. If this is an issue for your Church, and you need a helping hand, please get in touch with the Gift Aid Lite team (see back page for our contact details).

Also some Churches are not actively promoting their online donations facility in their services, web

and A Church Near You pages, social media sites, or via their Parish Magazine or Newsletter.

As Churches start to reopen the use of cash is being discouraged, see the front page. Your online donate now button should be promoted in your buildings. Visitors can easily donate from their mobile phones if online donations are promoted using QR codes on posters. The Gift Aid Lite team can provide your Church with a user guide explaining how to do this. This guidance from the Parish Resources website may be helpful [www.pariahresources.org.uk/encouraging-giving-online/](http://www.pariahresources.org.uk/encouraging-giving-online/)

# BITS AND BOBS

## Gift Aid quarter end dates

This year's quarter end dates are:

- Wed 30th September 2020
- Thurs 31st December 2020
- Mon 5th April 2021
- Wed 30th June 2021



## Online support and training

Although working from home, the Gift Aid Lite team can still provide advice and support via email or by using a number of online tools, and they include:

- RealVNC is used to remotely access your computer using a piece of software you have already downloaded. It is encrypted to ensure the safety of both users. You have to provide permission each time, and our staff can provide you with a unique nine digit code to input into your PC.
- Zoom is used for audio and video calls using a computer, tablet, mobile or landline phone. It allows online meetings to be scheduled in advance. The free version allows two people to speak without a time restriction. A meeting with three people or more can last for up to 40 minute in the free version.
- 'Giving, fundraising and finance' Facebook group has been created to allow Churches within our Diocese to ask question connected to the name of this publicly accessible group. The questions could be answered by Diocesan staff or members from other Churches.

## Free online training from Data Developments

Data Developments' online training is being provided free of charge at present. Course topics include those for My Giving Online and My Fund Accounting Online. Full details available at [www.datadevelopments.co.uk/services](http://www.datadevelopments.co.uk/services)

A FREE webinar is taking place on Thursday 23rd July at 3 p.m. covering an overview of the facilities and features of My Giving Online. This will be useful for Churches thinking about joining the Gift Aid Lite scheme, or using the software. If you are unable to join at this time once registered, you'll be able to watch a replay at a later date. You can register at <https://event.webinarjam.com/channel/MyGivingOnline>

There are video guides available in My Giving Online when you click on the camera icons. Also, copies of our 'printed' user guides are available to download from our Facebook group page.

## Parish Buying and Parish Resources websites

The Church of England's Parish Buying website is an excellent way for your Church to access a variety of resources at reduced costs compared to a seller's normal prices. This could be particularly useful in the current 'lockdown' environment we are experiencing.

It can be found at [www.parishbuying.org.uk](http://www.parishbuying.org.uk)

Parish Resources is an excellent online website for all administrative, stewardship and financial information connected to the management of Churches. It is has a dedicated section focusing on COVID-19 advice.

It can be found at [www.parishresources.org.uk](http://www.parishresources.org.uk)

## Gift Aid Lite members using paper returns

As Church House is closed until at least the beginning of September, we will not be able to post out paperwork to a Church's Gift Aid Secretary in the useful way at the end of this month. Instead, the Gift Aid Lite team is planning to send out this paperwork again via email to enable a Church representative to print this out and distribute the documents to the correct person, as appropriate. This will be sent in the near future to the Incumbent, Priest in Charge and/or Treasurer only.

Please ensure all claims are up to date to assist with your Church's cashflow. If you need assistance don't hesitate to contact us.

## Online and phone Gift Aid declarations

One of the issues posed by the pandemic is how to collect a donor's Gift Aid declaration when the donation is made online or over the phone. Aside from actually posting a hard copy Gift Aid declaration form, it is also possible to ask donors to make Gift Aid declarations by email, online or verbally by phone.

Please read the guidance from Parish Resources (<https://bit.ly/2VABJUY>) outlining how to take Gift Aid declarations over the phone, online and via email. It includes details on what information you need to request from the donor to fill in a declaration on their behalf, and what information you must include when entering a declaration into My Giving Online.

Digital Gift Aid declarations were distributed to Churches earlier this year. These can be sent to your donors via post or email for completion and return.

# TOP TIPS WHEN USING MY GIVING ONLINE

## Requesting second user IDs and passwords

If a second person at your Church requires access to My Giving Online please do not share your own user ID and password with them. It is easy to set them up with their own to access the software securely. Additionally, we can also limit the areas they can access in case there is information or features you don't want them to see (e.g. inputting gifts).

## Transferring (or deleting) gifts you have inputted into My Giving Online, but not transferred to donors' records

As you'll be aware there are a variety of methods you can use to input donations into My Giving Online. All of them at some stage require you to transfer the gifts you have inputted so they get added to a donor's record.

However, there are a couple of methods where these donations are not deleted from the screen if you haven't done this before leaving My Giving Online. For example, 'enter donations by name, envelope or reference' and 'quick add donor and gift'.

Please can you check these areas of the software to see if you have left any donations behind. Before you transfer them, please carefully check the donor's record to make sure you haven't already inputted them. If you haven't added them you'll be able to safely delete them.

This can cause serious issue further down the line, as it will take time to resolve. Forgetting to press transfer once you have completed your inputting leaves items 'in limbo', which means they are not claimable and could result in double entries/claims.

## Setting up your regular Standing Orders to make inputting easier

An increasing number of Churches are encouraging their donors to complete Standing Order forms. This has a number of benefits to the Church as it automates giving, reduces transaction fees and banking expenses, and often the donor's annual giving is increased.

Within My Giving Online it is possible to enter the Standing Order details into a donor's record in advance of their expected gifts. This includes the donation amount, usual donation date, and frequency of the gift.

Upon receipt of your bank statement these pre-entered donation details can be transferred to the donors' records using 'view and transfer regular gifts'. Before you start, you'll need the date range covered by your bank statement. Then follow these steps:

- Firstly, add up the total amount of Standing Orders to create, and input, a control total.
- Secondly, work down the list of Standing Order to tick off those that have arrived in the bank. Whilst doing this, you'll need to check the donation date and amount for accuracy, and make changes if required.
- Thirdly, check to make sure the donations total and control total are the same.
- Fourthly, add a batch reference and comment for the donations you have ticked.
- Finally, transfer the donations to the donors' records and print off your donation audit report.

Name	Donation Date	Amount	Claim Tax	GASDS Eligible	Purpose	Method	Envelope #	Reference	Batch Reference	Comments	Action
Dickens, Charles	06/06/2020	75.00	Yes	No	General	Standing Order	N/A	pract0000014	Reg-200609		View Gift

This is covered in greater detail in the user guide GAL14. Of course, if you need help and assistance to set this up please contact us for assistance.

## Confusing the anonymous and aggregate inputting screens

Some Gift Aid Secretaries have confused the screens used to input anonymous and aggregate donations. This has result in deletions and reinputting having to take place. For clarity please remember to use these inputting methods for the following donations only:

- View and edit anonymous donations - is used to input your open plate and wall box donations only. Once inputted, these donations are claimed under your Church's GASDS allowance
- View and edit aggregate donations - is used for the one-off Gift Aid envelopes you have received on a single donation date. If the envelopes are valid, the donations can be added together into a single amount (aggregated) and inputted. The batch reference used should include 'agg', the donation date, and the number of envelopes

that made up the donation (e.g. agg050720-004).

Please continue to send your one-off Gift Aid envelopes to the Gift Aid Lite team for validation. However, If the donation is received from an existing regular donor please record this against their donor record, and we don't need to see their envelope to validate it if they already have an existing Gift Aid declaration.

If the donation is in excess of £20 you have to add this donation by setting up a new donor record using 'quick add donor and gift' to ensure you are following HMRC requirements.

### Ensuring you balance with the total amount of donations received by your Church

Before you send your claim report/claim paperwork to the Gift Aid Lite team, it is vitally important you have ensured the total amount of giving you have inputted/recorded matches the total received by your Treasurer for the month or quarter. If this check isn't completed, it could result in your Church either under or over claiming from HMRC.

My Giving Online users have a number of ways in which they can use the reports section to ensure they are balancing/reconciling back to their Treasurer's total. This is also a great to check to see if your donations showing as unclaimable can instead become claimable! The Gift Aid Lite team uses these reports to check your claims before we submit them to HMRC.

Donations Excluded from Claim Manchester DBF (Organisation)

Step-1 Step-2 Step-3

All Fields

Fields to be exported

DonorName DonorReference Amount DonationDate Reason

DonorName Desc

Generate Report

The 'donations excluded from claim' report can be found under the reports menu in the claims section. In step 1, enter the date range of the donations; in step 2, leave this unchanged; and in step 3, ensure your screen looks like the image below before you click on generate report.

The reports will list any of your donors that have been excluded from your claim because of Gift Aid declaration issues.

The 'audit trail' report can be found in the reports menu in thank you letters section. This report can be used in a variety of useful ways, for example:

- A report showing all of the giving you have inputted. This includes the Gift Aid and GASDS donation received from individuals, open plate donations, aggregate donations etc.

- You can split the report to allow you to just see your GASDS eligible donations. If you are inputting your envelope donations from non-tax payers, the report will show them as line-by-line entries for each donation date. This allow you to check if you missed inputting any GASDS eligible donations.
- A report can be produced showing all of your unclaimable donations. Some of these will be genuinely unclaimable (e.g. non-taxpayer donations received via cheques or Standing Orders). However, you may spot donations which could be claimable. If so, use the details in the report to visit the donor's record, or relevant entry in the software, to make the changes and ensure the donations are claimable using Gift Aid or GASDS.

Whether you are live and inputting into My Giving Online, or if you are still completing 'paper' returns, please ensure you are completing some/all of these checks each time you send in your claim. Your Church could be missing out on some valuable income, but it could also be overclaiming and a HMRC refund would be required.

### Churches trained, but not yet live

A number of Churches have received training to use My Giving Online, but they have still not gone live and started using it. Please can these Churches make a conscious effort to get underway, of course with help and support from the Gift Aid Lite team.

Our Diocese received funding from the National Church to provide this level of support and training to our Churches, but it is time-limited and will come to an end in April 2021.

### Keeping up to date and monthly claims

The Gift Aid Lite keeps a regular eye on how recently a Church has made a Gift Aid and GASDS claim. This has shown that a substantial number of Churches did not make a claim to cover donations received during 2019, and some pre-date this. Please ensure you're up to date as this will benefit the cashflow of both your Church and the Diocese.

If your Church has received donations in excess of £400, please note you can make a HMRC claim on a monthly basis.

### My Giving Online user guides

Please note, if you need to download copies of our My Giving Online user guides you can do this at [www.facebook.com/groups/dioceseofmanchestergiving/files/](http://www.facebook.com/groups/dioceseofmanchestergiving/files/)

They will also be downloadable from The Diocese of Manchester website in the near future.

# MAXIMISING YOUR GASDS CLAIMS

Lockdown is presenting particular challenges for those donors who utilise the Gift Aid Small Donations Scheme (GASDS). Many of our Churches have contacted the Gift Aid Lite scheme about this, and we have also issued updated advice via the Diocese's eNews to all Churches too.

Please see the following guidance from HMRC.

*"During the COVID 19 crisis HMRC would accept separate weekly envelopes containing £30 or less given when the Churches re open as eligible for GASDs. Alternatively, one envelope with a declaration which clearly states how much was being donated each week would also be eligible. For example: If a donor sends (say) £40 "to cover the next four weeks" then this would be eligible as £10 per week provided it is made clear (date provided for the weeks covered) that it is four separate donations in the same envelope."*

This can apply for any envelope donations received during lockdown as well.

Unfortunately, if these donations were given by cheque, Standing Order, BACS transfers or PayPal they are still **not claimable under GASDS**.

It is essential that all planned giving envelopes are clearly marked as required by HMRC, and we suggest the full retention of these envelopes for the required six years. Audit trails should be fully maintained.

Please follow National Church and Diocesan guidance regarding collection of these envelopes during lockdown (see page 1).

Planned giving envelopes donated by those who have a current regular Gift Aid declaration are not affected and can be claimed in the usual way!

Please make sure you follow the inputting advice recently issued by the Gift Aid Lite team. Further information and guidance is available from [Susanwarren@manchester.anglican.org](mailto:Susanwarren@manchester.anglican.org) (0161 828 1424).

## PROOF OF CHARITABLE STATUS

Some organisations require charities to prove they have charitable status to access certain discounts, or to set up bank accounts. This has proved to be difficult for Churches who are excepted charities.

It is now possible to produce a PDF document from your Church's 'A Church Near You' page. You can download a certificate to print off, email or upload to provide the required evidence they are looking for.

We've produced a YouTube video which explains how to do this [www.youtube.com/watch?v=48022Wz2a-4&t=100s](http://www.youtube.com/watch?v=48022Wz2a-4&t=100s)

**Please don't forget to follow us on social media or join our Facebook group:**



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[www.youtube.com/channel/UCVb\\_xE3rvBZ\\_jIYZX6IWxHA](http://www.youtube.com/channel/UCVb_xE3rvBZ_jIYZX6IWxHA)



Thank you!!



**Sue Warren**

**Diocesan Gift Aid Advisor**

T: 0161 828 1424

E: [susanwarren@manchester.anglican.org](mailto:susanwarren@manchester.anglican.org)



**Paul Bailey**

**Digital Giving Officer**

T: 0161 828 1464

E: [paulbailey@manchester.anglican.org](mailto:paulbailey@manchester.anglican.org)



**Susan Lomas**

**Administrative Assistant**

T: 0161 828 1464

E: [SusanLomas@manchester.anglican.org](mailto:SusanLomas@manchester.anglican.org)