



Church of Ireland – Generous Giving Programme

“Everything comes from you, and we have given you only what comes from your hand.” (1 Chr 29:14 NIV)

What is the Generous Giving Programme?

It is a simple 7-step plan to help parishes encourage generosity and enable fresh mission and ministry. It changes the focus from paying bills to growing God’s Kingdom.

Why do we need it?

It can be difficult for churches to stay motivated by their vision to serve and engage with the needs of their local community whilst struggling to meet their everyday running costs.

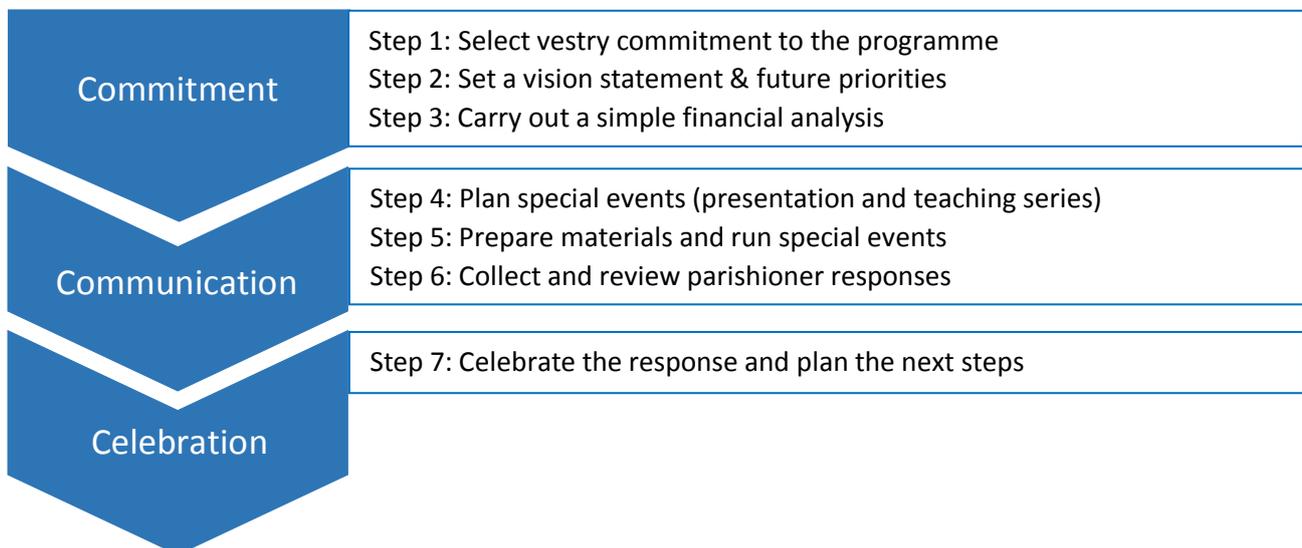
How will it help?

Central to the programme is a presentation event and biblical teaching series which will help parishes to:

- Understand what God is calling them to do
- Connect giving with faith
- Get a realistic picture of their finance and giving
- Link their giving directly to mission and ministry
- Prayerfully reflect on personal level of giving
- Use practical tools to encourage generous giving

‘Generous giving’ includes the giving of time, talents and gifts, through volunteering and service, as well as giving money. This programme focuses mainly on financial giving, but in doing so it aims to change people’s mind-sets, and in turn, create the right climate for growth in all areas of giving.

Generous Giving Programme Overview:



The programme breaks down into three phases and seven steps. Each step is essential to the success of the whole programme and is supported by advice and simple, helpful templates. The programme is flexible but typically takes around 4 months to complete; a suggested timetable and other support resources can be found at ireland.anglican.org/parish-resources/people-community.

‘Bring your full tithe to the temple treasury so there will be ample provisions in my temple. Test me in this, and see if I don’t open up heaven itself to you and pour out blessings beyond your wildest dreams.’
(Malachi 3:10 MSG)

Commitment

Step 1: Select vestry commitment to the programme

(a) Confirm support for the programme

The programme starts with commitment from the select vestry. Its support is essential to the success of the programme. The select vestry should meet to discuss their understanding of the process, its importance to their parish, and to confirm its prayerful and practical support.

(b) Appoint a Giving Co-ordinator

Central to the programme's success is the appointment of the Giving Co-ordinator. It's important to use the gifts, passions and experience of lay people who can champion generous giving. The Co-ordinator should be passionate about generosity and someone who really 'gets' giving and its importance to parish life. It's best if it is *not* the church treasurer, and may not even be a member of the select vestry, but rather someone who is involved in and respected by the church community.

The ideal Giving Co-ordinator would:

- Be encouraging and positive
- Lead the Generous Giving team
- Organise individuals and activities
- Co-ordinate the programme timetable
- Liaise with the rector and select vestry
- Work closely, and confidentially, with the treasurer
- Communicate positively with the parish

A template job description for the Giving Co-ordinator is available at [\[ireland.anglican.org/parish-resources/people-community\]](http://ireland.anglican.org/parish-resources/people-community).

(c) Set up a Generous Giving team

The Generous Giving team will support the Co-ordinator and be responsible for implementing the programme on behalf of the select vestry. At a minimum, the team might include:

- Giving Co-ordinator
- Rector
- Treasurer
- Churchwarden

The number of additional members in the support team may vary depending on the size of the parish. It would be helpful to include someone with experience giving presentations or in event publicity. Additional volunteers may support certain activities and, ultimately, the whole parish should feel part of the programme. The job of the team is to ensure the programme stays on track and is sufficiently well organised and implemented.

(d) Get people praying

The foundation of this programme is prayer. The church should pray specifically for God to give wisdom, direction and clarity to every step of the process, believing that He will provide for and bless His work.

A prayer strategy might involve:

- linking with the prayer groups in church
- planning specific prayer events
- prayer cards
- incorporating prayers for the Generous Giving Programme into the weekly Sunday services.

Further prayer strategy ideas and resources can be found at [\[ireland.anglican.org/parish-resources/people-community\]](http://ireland.anglican.org/parish-resources/people-community).

Step 2: Set a vision statement and future priorities

A clear and specific vision for your church's mission and ministry is at the heart of encouraging generosity, and creates a firm foundation for inspiring the parish and allocating resources for the future. If your parish already has a vision statement and mission priorities, it is important to communicate them clearly. Ensure parishioners have been involved in determining the vision, consulted and informed, so they feel ownership of it and understand that they are an integral part of the future plans.

Decide on two or three specific priorities for the future. Focus on the actions necessary to achieve your vision and not just on finances. The focus on practical and positive actions will help your parish rise to the challenge – vision first, money second. It's important to communicate to parishioners the difference that their offering makes in enabling the mission and ministry of the parish, and that it doesn't just pay bills!

The vision statement and mission priorities will be included in all your publicity for the Generous Giving Programme, in the presentation and special events, and will be the focus of your prayer strategy.

If your church does not have a vision statement:

The select vestry and leadership team of the parish should take some steps to discern God's heart and direction for the parish. Some ideas to help include:

- SWOT analysis (identify strengths and weaknesses of, and opportunities and threats to your parish)
- Dream some dreams! Where do you see the church in 5 years?
- How can you better reach out to your local community?
- Set 3 specific mission priorities
- Bring in an external facilitator to help you look honestly at the priorities of the parish
- Consider a 'vision away day' for the select vestry and the leadership
- Circulate questionnaire to parishioners for feedback and comments

Resources to help plan a vision statement can be found at [[insert link: ireland.anglican.org/parish-resources/people-community](https://ireland.anglican.org/parish-resources/people-community)].

It is vitally important that the church family is involved in and committed to the priorities of God's vision for the parish. The vision statement will give clarity to the financial requirement and will be included in the programme's publicity, presentation and prayer strategy.

Step 3: Carry out a simple financial analysis

The Generous Giving Programme is focused on encouraging generosity, so that parishes can not only meet their everyday running costs but plan for the future and provide financial resources for growth, mission and ministry.

To do this, it is important that the Generous Giving team has a clear and realistic financial picture, including:

- an understanding of the basics of parish income and expenditure
- an understanding of what it takes to meet the running costs of the parish
- an idea of the necessary increases that would be needed to meet the vision statement priorities
- a profile of the giving patterns of the givers in your parish.

(a) Create a budget

It may be useful for your parish to set out a proposed budget for the next 3 years which includes the financial elements of your vision statement and priorities. The team could work alongside the parish treasurer to get a realistic picture and set some achievable financial targets that will meet the running costs of the parish, fund continuing activities and new planned initiatives.

The RCB provides useful budgeting templates and advice for treasurers on [ireland.anglican.org/parish-resources/parish-finance].

(b) Focus on sustained planned giving

Fundraising activities and events which encourage one-off donations are important not only for generating income but also for creating a sense of church community. Keep incorporating these events into the life of your parish.

However, for long-term sustainability and growth it is essential that emphasis is put on encouraging planned giving. Planned giving is giving that is regular, realistic and proportionate.

(c) A Parish Giving Profile

Create a parish giving profile to get a true picture of the strengths and weaknesses of giving patterns in your parish. A template profile can be found at [\[ireland.anglican.org/parish-resources/people-community\]](http://ireland.anglican.org/parish-resources/people-community).

The template profile asks you to set out how many people give regularly, how much they give each month, how they give (freewill offering envelope, standing order), how many people have signed the relevant forms to allow the parish to claim back tax, how much money comes in as one-off donations and loose plate collections (cash).

Connect the donations made with membership statistics; consider the number of people who attend but who do not give regularly. It will be important to communicate the reality of the giving patterns in your information leaflet and presentation (see Step 5 below).

Set some financial targets to help meet the vision priorities, for example, *“if each parishioner gave an extra £2 / €2 a week it would raise an extra per year to start a community outreach”*.

(d) Help parishioners plan their giving

Many parishes have traditionally facilitated giving through the use of freewill offering envelopes. Although familiar to us, this method is based on historic behaviour (when most people received a weekly wage in an envelope!) and is no longer the most effective method of giving, for the giver or the parish. Nowadays, most outgoings are paid directly via our bank accounts by direct debit or standing order. Therefore, it is appropriate to consider our financial relationship with the Church in equally up-to-date terms and in line with our other personal finances.

Simply communicating to parishioners that there are alternatives to a weekly envelope can be hugely effective. Share the information needed for parishioners to set up standing orders or direct debits. A guaranteed weekly or monthly payment means the parish won't lose out on the weeks a member may be unable to attend the Sunday service. Reducing the amount of cash which is handled in turn reduces the pressure on those who undertake the tasks of counting, recording and lodging the money on a weekly basis.

If your parish members enjoy the traditional gesture of making a physical offering, think about an alternative 'token' of some sort that parishioners could put into the collection plate; many churches have tokens such as cards for people who pay by standing order. It may be as simple as acknowledging that a person can contribute in ways other than giving an envelope on a Sunday – this could help alleviate the discomfort some may feel by letting the offering plate go by without contributing.

(e) Maximise Tax Efficient Giving

Tax refund schemes for charitable bodies allow parishes to claim tax relief on donations. These extra funds can make an enormous difference to the parish. However, if parishioners who are tax payers donate but are not signed up to the relevant scheme (Gift Aid Declaration in Northern Ireland or Enduring or Annual Certificates in the Republic of Ireland) their parishes are missing out on valuable income.

It is a good idea to include a bank mandate and Gift Aid Declaration forms (for Northern Ireland) or Enduring or Annual Certificates (for the Republic of Ireland) with the Generous Giving Programme response forms when they are circulated (Step 5 below).

Under Gift Aid in Northern Ireland, the parish can claim 25p in every pound donated by tax paying members of the parish. In addition, the parish can claim 25% tax relief on small cash donations of £20 or less (on up to £8000 per year) through the Small Donations Scheme. In the Republic of Ireland, parishes can claim a blended rate of tax relief which equates to nearly 45c per Euro donated by tax paying members (who donate €250 per year) – share this information! Further advice on the process for reclaiming tax in either Northern Ireland or the Republic of Ireland is available from the RCB or the relevant tax authority.

Communication

Step 4: Plan the special events (presentation and teaching series)

Central to the programme is the presentation event and biblical teaching series. The presentation will be on the parish vision and plans for the future, including a picture of the church finances and what is needed for these plans to become reality. This could be part of a Sunday service, or run separately. An information leaflet and confidential response form should be prepared and given to each parishioner at the presentations event (see Step 5 below).

The biblical teaching series will focus on the theme of generosity, and is usually delivered on two Sundays following or around the presentation event. People give generously when they understand that giving is rooted in discipleship and worship, when they know what their money is being used for and that it is making a difference. After all events, there should be opportunities for the parish to prayerfully respond.

(a) Set dates for your events:

Consider when to hold the presentation event and supporting teaching series. We would suggest setting aside 3 Sundays, and then holding a celebration Sunday another 4 weeks after the events. Suggested Event Plan:

Sunday 1 – presentation	Generous Giving Programme Presentation
	Distribution of the leaflets and response forms
	Encourage people to prayerfully consider their response
Sunday 2 – teaching	1 st teaching sermon on generosity
	Continue to encourage people to respond
	Offer opportunity to return response forms
Sunday 3 – teaching	2 nd teaching sermon on generosity
	Continue to encourage people to respond
	Offer opportunity to return response forms.
Celebration Sunday	Celebration and thanksgiving event (four weeks after Sunday 3)

Some parishes may have different groups of people who worship at different times during the week. The team will need to decide whether the presentation and follow up services are run for each group at their particular service or whether everyone is invited to one presentation event. How this will work may depend upon the parish dynamics, and whether people are willing and able to attend services at a different time. Arrangements are best decided by the Generous Giving team.

Some may decide to run the event and presentation on a special night or weekend with food and other activities, rather than at a Sunday service, and have the teaching on the Sundays at either side. It is important to cater this event to your parish and surrounding community, so that it attracts as many people as possible.

When setting your dates it may be best to stay away from already busy times in your church calendar like Christmas and Easter, and from holiday times when attendance may be less than usual. Although the parish may already hold special events or services around Harvest, it is a very relevant time to celebrate God's provision and focus on encouraging generosity.

(b) Plan the Format for the presentation Sunday

This is a chance to demonstrate generosity in practice, as well as to communicate the positive impact your parish already has on the local community, and its vision for the future. Try to attract as many people as possible and create a sense of occasion. Consider serving some food either before the special service (breakfast, croissants, bacon butties, donuts etc.) or after the service (lunch, picnic, BBQ). Food always encourages more people to attend, and is a simple way of demonstrating generosity, as well encouraging a sense of community and relationships.

The service could include:

- Information leaflets and response packs given out to everyone as they arrive
- Introduction from the rector
- Presentation by the Giving Co-ordinator
- Summary and biblical reflection from the rector
- Prayers for the programme and encouragement to pray and reflect on a personal response
- Announcement of teaching series (for example, on the next two Sundays)
- Information on the response packs and how to complete and return them
- Announcement of the date of the Celebration Sunday of thanksgiving.

(c) Prepare a list of contacts

It is important to encourage all those who are interested in and support the life and mission of the parish to attend these events and services. A member of the team should take responsibility for putting together a list of people who will receive a personal invitation by post or email, including:

- People on the general vestry register
- People who already give to the parish but may not be registered members
- Those who attend regularly but aren't yet considered to be planned givers
- Families of newly baptised children, and recently married couples
- Church magazine recipients
- Sunday school families
- Families of members of Church organisations

(d) Design and send out invitations and publicise events.

The team will need to give some thought as to how the invitations will be produced and circulated.

Invitation cards could be given out by the churchwardens at the Sunday services at least three to four weeks before the presentation Sunday, or personal invitations should be posted or emailed in good time before the presentation Sunday.

It is important to personally invite the people in your parish who are already regular givers. It is essential that the church communicate that this is priority for the parish, to announce it at every opportunity, and to pray for the presentation and teaching series. The invitation cards should make it clear that the presentation is simply providing an opportunity to hear about the parish's vision and plans, and that there will be opportunities to reflect and respond during the following teaching series. Continue to pray for these events at every opportunity.

A simple invitation is enough; there is a template at [\[ireland.anglican.org/parish-resources/people-community\]](http://ireland.anglican.org/parish-resources/people-community).

Step 5: Prepare materials and run the special events

(a) Create an information leaflet

An information leaflet should be given to all parishioners at the presentation event. Templates to help the Generous Giving team prepare the information leaflet and response pack (below) can be found at [\[ireland.anglican.org/parish-resources/people-community\]](http://ireland.anglican.org/parish-resources/people-community).

This leaflet is an opportunity to communicate the good news stories in your parish and the impact your parish has on people's lives. The leaflet should include the following information:

- Your vision statement
- What you are already doing (e.g. ministering to 60 children each week, serving 50 meals a month, supporting 20 lonely people each week, engaging with 50 young people through youth club etc.)
- What you plan to do in the next 3 years; make your mission priorities clear.
- How you plan to make that happen and what financial resources are needed to achieve this; you may consider including an overview of your parish finances, and the giving profile of your parish.
- How the whole parish can play their part; focus on becoming a generous church, increasing giving, thinking about how you give, maximising gift aid, and using gifts and talents to serve in these ministries.
- Encouragement to people to prayerfully consider their giving and to respond.

Keep the leaflets informative, colourful, simple and to the point, including photographs and good news stories.

(b) Prepare the response pack

The response pack should be circulated along with the information leaflet and should encourage parishioners to personally reflect on their levels of giving and generosity, and to prayerfully respond. It should include a Standing order form and a Gift Aid Declaration (Northern Ireland) or Enduring Certificate or Annual Certificate (Republic of Ireland), as relevant, and a confidential envelope in which the completed form is to be returned to the Giving Co-ordinator, team or treasurer.

It is important that you include a deadline for your responses. Also encourage people to play their part in the vision and mission of the church. Every person's gift is valuable, no matter how much or how little. There should be an opportunity to respond at both the teaching Sundays, and some follow-up may be required.

Think about how parishioners will return their response forms, for example:

- A post box in the entrance of the church
- In a confidential envelope directly to Giving Co-ordinator
- On the offering plates during the service
- Bring their responses personally to the front, to a cross or a basket
- To the church office

(c) Prepare the presentation

The presentation will explain more fully the details of the information leaflet provided. Aim for a lively, interesting, visually attractive presentation, underpinned with thankfulness for what God has already done, and giving an outline of the future plans. It should celebrate the goodness and generosity of God, and the privilege of being part of His family. The presentation should include:

- A brief history of the parish church, its role in, and impact on, the local community;
- An outline of the vision, the priorities, new initiatives planned and their potential impact;
- How the new plans will be carried out and the financial resources needed to achieve these;
- An overview of the current financial situation of your parish and the Parish Giving Profile;
- A challenge to every person to be involved in the future mission and ministry of the parish; and
- An explanation of the blessing and growth that will come from being a generous church.

A presentation is most effective at getting a clear message across, and could be effectively delivered by the Giving Co-ordinator, or another member of the team.

(d) Prepare a teaching series (2 Sundays)

This programme is based on a firm foundation of teaching and prayer. Biblical teaching on generosity helps us to listen to where God is calling us, and seek his blessing on everything that we do. It prepares our hearts and minds to respond to what God is challenging us to do. It connects our giving with our faith, and as we give, we grow in our relationship with God and in our relationship with others. Our churches grow as we see hearts changed and resources (both financial and people) released for mission and ministry.

Alongside the presentation, the two Sundays of biblical teaching on the theme of generosity will encourage parishioners to focus not just on the cost of running a church, but rather on living generously in all aspects of their lives. God speaks through His word and challenges hearts to respond.

It is acknowledged that there can be challenges and sensitivities involved in teaching on generosity and giving. This programme aims to make resources available to support biblical teaching; some can be found at [\[ireland.anglican.org/parish-resources/people-community\]](http://ireland.anglican.org/parish-resources/people-community) and the further sharing of teaching materials is encouraged. An alternative option might be to invite a guest speaker for the teaching series.

At the two teaching Sundays, the congregation should be given an opportunity to respond.

Step 6: Collect and review parishioner responses

(a) Collect and follow-up

As responses are received they should be carefully and confidentially recorded; those from whom responses are received should be checked off against the list of invitations sent so it's clear what proportion of people have responded. Once the deadline for responses is near, it is important to follow up with those yet to respond to try to get the best possible outcome for the programme.

The degree of follow-up required will depend on the level of response received and what the team feels is appropriate in their parish community. It will be up to the team, perhaps in conjunction with the select vestry, to decide what level of follow up is needed and how this should be approached. Ideas for follow up include running an open session to meet and discuss questions with the Generous Giving team after a service, an announcement from the pulpit, a reminder in the notices or parish website, or emails or telephone calls to remind people of the deadline.

Follow-up reminders should happen in good time, be sensitive and well-organised. Remember that responses need to be collated in time for results to be shared at the Celebration Sunday service.

When undertaking any follow up activities to try to improve the response rate, it must be clear that the reason is to provide everyone with a chance to have their responses included, and *not* to put pressure on people to discuss their levels of giving.

(b) Review of responses

The responses should be collated and reviewed by the team as soon as possible after the deadline. Further responses received as a result of follow-up reminders will also need to be considered.

It is also important to be aware of, and to record, any changes in giving patterns or behaviour of the congregation. The giving team and treasurer may need to consider the impact any changes will have on the financial requirement of the parish mission priorities.

Create a summary of the overall response to be presented to the whole parish on the Celebration Sunday.

- Has there been an increase in planned giving?
- Has there been an increase in the numbers of planned givers?
- Has the percentage of standing orders increased?
- Has there been an increase in the number of people signed up for Gift Aid or Enduring/Annual Certificates?
- What is the projected increase in income and what will be the impact on your future plans and ministry?
- Have the targets been reached?
- Have there been any other outcomes? (E.g. increase in service, volunteering, or prayer)

Celebration

Step 7: Celebrate the response and plan the next steps

(a) Celebration Service

A special service of celebration and thanksgiving should be held no later than 4 weeks after the completion of the presentation event and teaching series. This service is a chance to feedback the results of the programme including the analysis of the responses and the impact that these will have on the mission and ministry of the church. More importantly this service gives an opportunity to thank God for His generosity, His provision and His blessing, and to thank and value all the parishioners who reflected and responded.

(b) Thank you letters

This step is so simple yet so important. Unfortunately, it's something that some parishes are not very good at doing! As soon as the responses are collated and the celebration service has taken place, thank you letters should be sent to every person who has responded.

This provides an opportunity to thank members for their support, and to explain to them how their giving will enable the church to fulfil its mission and ministry. It is important to link the giving with the mission priorities,

and the impact it will have. It also helps people to know that, no matter how big or small, their gifts are valued by the church. Expressing gratitude encourages people to keep giving generously. These letters should be personalised to each giver and should be sent out from the treasurer, the rector or the Generous Giving Team.

In this personal thank you letter, please **don't include** a request for more money, as it undermines the gratitude and risks the 'thank you' message getting lost!

It is good practice to send out thank you letters to your planned givers every year, and keeps generous giving on the radar. Template letters can be found at [ireland.anglican.org/parish-resources/people-community].

(c) 6 month vision update and anniversary service

Aim to give parishioners a progress report after 6 months. Include an update on the vision statement and priorities from the original Generous Giving programme. Use this opportunity to collectively thank the respondents again, and outline the impact their giving has already made and will make to the future of the parish.

A year after the events and teaching series, consider having an anniversary service to thank God for the previous year's blessings, recap on what has been achieved and continue to look to the future.

(d) Revisit Generous Giving every year

It is good practice for the select vestry to commit to having a conversation about giving every year, and to commit to taking appropriate action. Such a commitment could be to:

- Include annual biblical teaching on the theme of generosity so it becomes a central part of worship and discipleship
- Send thank you letters to planned givers every year
- Review the parish giving profile each year
- Recap relevant elements of the Generous Giving Programme as needed.

A template annual review form for use by select vestries and Generous Giving teams can be found at [ireland.anglican.org/parish-resources/people-community].



Church of Ireland – Generous Giving Programme

Templates and Supporting Documents

Giving Co-ordinator Role & Ministry Description

Suggested Timetable for Generous Giving Programme

Church Development Cycle

Vision Guidance – to help clarify a parish vision

Parish SWOT Analysis

Vision Checklist

Simple Parish Budget Template

Parish Giving Profile

Sample Invitation Letter

Sample Invitation and Reply Card

Sample Tri-fold Information Leaflet

Sample Response Card

Standing Order offertory cards

Gift Aid Declaration Form / CHY 3 / CHY4

Teaching Resources:

- A Framework for Generosity
- The 6 stages of giving
- Generous Giving Beliefs

Example Thank-You Letters (3)

Annual Review Survey



Generous Giving Programme

Giving Co-ordinator Role & Ministry Description

Core Tasks:

- Facilitate the Generous Giving Programme;
- Co-ordinate the parish's Giving Team to support the Generous Giving Programme;
- Work with the select vestry to encourage tax-efficient giving (through publicity and making information and relevant forms available);
- Ensure givers receive a personal message once a year by encouraging the treasurer and/or rector to send personal thank you letters;
- Be the main contact for the Generous Giving Programme (for queries and advice);
- Keep the select vestry updated on the progress of the Generous Giving Programme
- Keep up to date with relevant materials on generous giving (<https://www.ireland.anglican.org/parish-resources/people-community>)

Person Specification:

- Enthusiastic about generosity and able to motivate people to give to God
- Sensitive to peoples situations and someone who will not pressurise
- Respectful of confidentiality
- Comfortable with their own levels of giving
- Has a high expectation but an understanding that some people will give and some people will not!
- Has an understanding that progress will only be made by encouraging and motivating regular, committed and sacrificial giving, and this will take time!



Vision Guidance

Discussion guidelines to help clarify a parish vision

A transforming vision

Having a clear vision for your church's mission and ministry is at the heart of generosity. It creates a firm foundation for allocating resources and inspiring the parish. Vision can transform the parish and the community, and gives a common purpose for which to work and pray.

The challenge for any church is to follow its heart and to be motivated by its sense of mission, rather than the need for money. A clear sense of why your church exists, who and what is it for, and the reasons which lie behind what you do will all help you to work out your vision. Meaningful consideration of the reason, purpose and action behind your vision will help parishioners to link their giving with their faith, play their part and make a difference in sustaining and developing on-going ministry.

Pray

Prayer is central to the vision process. Don't simply make plans for the future of the church and ask God to bless them – but seek His plans and commit to working alongside him. Every step should focus on prayer as the Lord guides and leads. Psalm 127v1 'Unless the lord builds the house, the builders labour in vain.'

Take action

Follow the steps in the illustration below to guide your actions. The advice on the following pages will help to guide you through the cycle.



DESIRE: Do we want to join in with God's plans?

Do you want your church to engage effectively in discipleship, mission, growing leaders, and community engagement? Do you want to move away from simply surviving to making a difference and seeing God's Kingdom grow in your church and your community?

If the answer is YES, then continue working through the cycle by taking the next step, below.



REVIEW: Where are we now?

It's important to start from where you are, and ask the right questions.

(1) Purpose and Values:

Ask 'Why does your church exist'? Does it have a clear sense of purpose? [it's always been here.....to share God's love.....to offer support / shelter.....to hold Sunday worship.....to make a difference.....]

What are the core values of your parish? [Caring... welcoming.....loving.....inclusive.....]

It may be useful to write a vision statement that represents your parish and is at the heart of everything you believe. Examples: "*Parish Church Name* is a welcoming Christian Community helping more people to experience and to express the reconciling love of God." / "To know Jesus and make him known." / "Reach, Build, Send."

(2) Undertake a simple SWOT Analysis

- Determine 'Strengths', 'Weaknesses', 'Opportunities', and 'Threats'?
- What is your church really good at and passionate about?
- What resources do you have? Volunteers, finances, leaders, skills?
- What are particular challenges for your church?

A SWOT analysis template is available at www.ireland.anglican.org/parish-resources.

Having a clear and shared sense of why your church exists is vital. When you know what your purpose is, then you can use your strengths, work on your weaknesses, understand the things that stop you from making a difference, and use the opportunities available to plan for the future.

When you understand what you are about, then you can move to discern where God is calling you to go.



DISCERN: Where does God want us to be?

It's important to discern what direction God is leading your church. One of the challenges is how best to combine the discernment by the leadership with the views and contributions of the wider church family and the local community.

(1) Vision

- What do you believe God is calling you to do?
- Does this fit in with the purpose of your church?
- Where do you see the church in 5 years' time? Dream some dreams. What would it look like?

- What would you like your church to have achieved in 1 years' time? Plan small steps; it's important that the plans are realistic, achievable and focused.

A parish survey or a parish away day is a great way of including parishioners in this process. Both help to discover parish priorities, and makes parishioners feel valued, that they belong and are listened to. It also means that the church is moving forward with a common purpose.

(2) Community Audit / Survey

- Will your vision make an impact on the local community, and is it what they need?
- Is anyone else providing this impact?

It may be beneficial for your parish to carry out a community survey / audit to find out about the needs of the community. It could include a simple door-to-door questionnaire, speaking to key community leaders, looking at what other organisations are doing to meet community needs (don't duplicate), and having a look at statistics for the local area (such as age profile, income levels, areas of deprivation etc).

(3) Priorities

Looking at the strengths and weaknesses of the parish, the purpose of the church and the needs of both the church and the local community, the priorities for the future of your ministry should be clearer. What are the things that you want to stop doing? What are the things you want to continue doing? What are the things that you want to start doing?

Set 2 or 3 strategic ministry goals – this is the end result, what you want to work towards, create, achieve, or bring to fruition, and start to plan some specific actions to achieve these goals.



PLAN: How will we achieve these goals?

Now you have prioritised 2 or 3 specific mission and ministry goals, it's time to look at how these can be achieved.

(1) Set key actions for each goal:

Flesh out your priorities and set a key action for each goal.

For example, if the goal is to increase the number of volunteers, then the action could be to run a Network Course (e.g. helping people to discern their spiritual gifts).

Then clearly define what resources are needed for each action, i.e. the What, the Who and the When, as illustrated by the examples in the table below:

Action	What	Who & by When
Run a Network Course	1. Purchase materials	Rector, by Jun.
	2. Identify and train leaders	Rector, by Oct.
	3. Publicise the course	Course support team, by Nov.
	4. Deliver the course	[TBC], by Dec.

It may be helpful to use 'SMART' objectives when setting your goals. Use the following diagram to guide your goal-setting.

'SMART' Objectives:

- S** • **Specific**; use clear language to define the goal. Set out who is involved, what will be done, where, how and why it will be done, constraints, requirements and reason
- M** • **Measurable**; work out how to track progress and measure the outcome; how will you know when the goal is accomplished?
- A** • **Achievable**; is the goal realistic? Do you have the appropriate resources (knowledge, skills, time) to make it happen? It may stretch and challenge but must be attainable.
- R** • **Relevant**; is the goal worthwhile and will it meet your needs? Is each goal consistent with any others set, and does it fit with immediate and long term plans?
- T** • **Timely**; include an overall time limit and a time frame for each step within the goal to help with time management and to ensure you keep making progress.

What are the financial implications and how can you meet these?

This may require you to set some financial goals, such as increasing the planned, sustained giving in your parish, and running some specific fundraising events.

Resources such as The Generous Giving Programme, Parish Giving Profile, and Simple Parish Budget can be found at www.ireland.anglican.org/parish-resources.

(2) Promotion and Communication:

A clear vision is what will encourage people to resource what you want to do, and helps you source the skills and potential support that you need by helping people decide where they can best contribute and make a difference. Be transparent in what you want to do and what finances are needed. Promote your vision for support – the discussion phase is complete.



ACT: Just do it!

Do it and keep going! Just do something! Very few people support an idea! It needs to be put into practice. Take a risk and trust God. Work in partnership with him, believing that he will continue to resource his church. Keep Vision-Focused and not problem-shaped (as there may be obstacles ahead), and continue to cover the process in prayer.

“For I know the plans I have for you”, declares the Lord, “plans to prosper you and not to harm you, plans to give you a hope and a future.” Jeremiah 29:11

Recommendation: Consider using the ‘Vision Checklist’ to keep you on track. It is available at www.ireland.anglican.org/parish-resources

CELEBRATE: Rejoice in what God has done among us!

Remember to always give thanks – thanks to God for beginning to bring his vision to fruition, and thanks to all those who are involved, supporting, and encouraging this important work. This is just the beginning and may not always be easy. Be vision-led and not problem-led. The process will require regular review of progress, on-going evaluation but keep listening to God’s voice and direction, and celebrate what He is doing!



Generous Giving Programme - Parish S.W.O.T. Analysis

Write down all ideas which come to mind, no matter how big or small. This will help to form a picture of the parish and its current situation.

STRENGTHS	OPPORTUNITIES
WEAKNESSES	THREATS

Using the ideas gathered in the SWOT analysis, select the parish's three most significant positives (strengths and opportunities) and three most significant negatives (weaknesses and threats). These will help to inform your mission and ministry priorities.

THE 3 MAIN POSITIVES (STRENGTHS & OPPORTUNITIES) OF OUR PARISH ARE:	1	
	2	
	3	
THE 3 MAIN NEGATIVES (WEAKNESSES & THREATS) OF OUR PARISH ARE:	1	
	2	
	3	

OUR PARISH PRIORITIES FOR MISSION & MINISTRY IN THE NEXT 2 YEARS ARE:	1	
	2	
	3	



Generous Giving Programme - Vision Checklist



- Do you have a **Vision**? (Where there is no vision, the people perish – Proverbs 29v18)
- Is the vision **Jesus-centred**? (Not simply social-action, as this eventually fades)
- Is the vision **specific**? (Not simply voting for 'world peace' but particular to your parish)
- Is the vision **achievable**? (Not an overwhelming goal like 'saving the world' but a realistic goal!)
- Is the vision **tested**? (Test the vision with trusted friends, colleagues, use God's word)
- Are the advocates **committed**? (Whole-hearted commitment gets a whole-hearted response!)
- Have you **promoted** the vision to gain support? (Take positive action to spread awareness)
- Has the vision begun to be put into **practice**? (It's easier to support action than ideas!)
- Have the costs and resources of implementing the vision been planned? (Luke 14 v 28)
- Run with it, **go for it!** (There is no risk-free strategy for success, but trust in God)

With thanks to Rev Dr Brendan McCarthy for his Vision Checklist 2012 on which the above is based.

© Representative Church Body – Generous Giving Programme

Generous Giving Programme - Parish Financial Review

Parish Budget (template)

INCOME	£/€	EXPENDITURE	£/€
Regular giving and donations:		Assessment:	
Planned giving	<input type="text"/>	Our contribution to the Mission and Ministry in the Diocese	<input type="text"/>
Gift-aid	<input type="text"/>		
Donations	<input type="text"/>		
Collections	<input type="text"/>	Church Running Expenses:	
Gift Days	<input type="text"/>	Repairs and Maintenance	<input type="text"/>
		Insurance	<input type="text"/>
Fees received for special services	<input type="text"/>	Capital Projects	<input type="text"/>
		Utilities (Gas, Electric, Water etc.)	<input type="text"/>
Fund-raising events	<input type="text"/>	Grounds Maintenance	<input type="text"/>
Other Income	<input type="text"/>	Administration:	
Rents	<input type="text"/>	Clergy Expenses	<input type="text"/>
Parish Magazine	<input type="text"/>	Lay payments and expenses	<input type="text"/>
Church Hall	<input type="text"/>	Communications	<input type="text"/>
Dividends and interest on reserves	<input type="text"/>	Sundries	<input type="text"/>
		Donations and Charities	<input type="text"/>
TOTAL	<input type="text"/>	TOTAL	<input type="text"/>
		SURPLUS or DEFICIT	<input type="text"/>

Notes

INCOME	EXPENDITURE
<p><i>Planned income</i> includes Church envelopes and bank standing orders.</p> <p><i>Special services</i> includes weddings and funerals.</p> <p>All income from fund-raising and other events is <i>gross</i> – that is, it is the total income before allowing for expenses and costs which have already been included under <i>Expenditure</i> .</p>	<p>Always enter the <i>full Parish Assessment</i> figure in the budget.</p> <p>It is easier to estimate next year's likely expenditure than estimate the income – so estimate the expenditure first.</p> <p>A fund-raising expense would be the costs associated with, for example, a Summer Fete; a trading expense would be the costs associated with, for example, running the Church Hall. These should be shown separately and not just deducted from the income from such events.</p> <p>Most select vestries donate to some associated and church-relevant charities – you should communicate to members what these are.</p>



Parish Giving Profile

Completing this form will help to create a picture of the parish's giving and to identify strengths and weaknesses, and benefits and drawbacks in the current giving behaviour of members.

This form should be completed by the Rector and the treasurer or finance team. Please share a completed copy with each member of your select vestry and, if relevant, your parish Generous Giving Team, for discussion.

Name of Parish:	
Number of Families on the Parish Census:	
Number of Individuals on the Parish Census:	

In the tables below please state the number of families who give in the following bands, *per year*, through your parish's various planned giving schemes (e.g. FWO envelopes, bank standing orders, direct debit), and their approximate total amounts given in the last calendar year.

1. PLANNED GIVING

Bands of Yearly Amount given £/€	Number of families	Total annual giving £/€	% of total annual giving of parish	Average weekly giving per family £/€
1-250				
251-500				
501-750				
751-1000				
1001-2000				
2001-3000				
Over 3001				
Yearly total				

2. TOTAL GIVING

	Yearly income total
A - Loose plate cash donations	
B - One-off donations	

C - Planned giving total (above)	
Total income (A + B + C)	

3. METHODS OF GIVING

	Number of families	Percentage of total givers
Total number of families who have given (within the year under review)		100%
Number of families who have given by standing order or direct debit (within the year under review)		
Number of individuals registered for Gift Aid (NI) or Enduring/Annual Certificate (RoI) (within the year under review)		
Number of families who use the parish FWO envelope scheme (within the year under review)		

4. INVESTIGATIVE QUESTIONS

What is the normal Sunday adult attendance?	
Roughly how many families do <i>not</i> give regularly?	
If all families were able to contribute an extra £2/€2 a week, by how much would your income rise?	
When did you last hold a review of giving?	

5. OTHER QUESTIONS WHICH MAY BE USEFULLY EXPLORED BY THE SELECT VESTRY

- a. How does the parish teach its members to respond to God's generosity? Is there clarity of understanding or could this be improved?

- b. In line with the majority of salary or pension payments being made directly through bank accounts, would it be appropriate to encourage more members to change the method of their regular giving to bank standing order instead of freewill offering envelopes or cash?

c. Have the majority of members who are taxpayers registered for the relevant tax-efficient giving method? i.e. Have they signed a Gift Aid Declaration (NI) or Annual/Enduring Certificate (RoI)? Could the proportion of taxpaying members who have registered be increased?

d. Is information on tax-efficient giving, and are the relevant forms (e.g. Gift Aid Declaration (NI) or Annual/Enduring Certificate (RoI)), easily available for casual visitors and one-off donations by church members?

e. Has the select vestry consider ways in which they could encourage a planned, regular financial commitment from members?

f. Does the select vestry set an example, by donating at least 10% of its income to other charities or mission agencies?

g. Should the select vestry commit to reviewing parish giving more frequently than it currently does?

6. SAMPLE TARGETS FOR THE YEAR AHEAD

Consider setting targets to increase the:

- number of families who give regularly
- number of people who give by Standing Order or Direct Debit
- number of people registered with Gift Aid (NI) or Annual/Enduring Certificate (RI)
- total giving to the parish by%

DISCUSSION NOTES:



Generous Giving Programme

Sample Invitation Letter

(to be used to invite members to the Generous Giving Presentation Event)

Insert Parish Name

Insert Parish Church Address

(Use parish headed paper, if available)

Dear

I have the pleasure of writing to you on behalf of the select vestry and the Generous Giving Team to invite you to a special service and presentation on Sunday [*insert date*] at [*insert time*] in [*insert venue*]. This special service will launch the Generous Giving Programme and will give us an opportunity to say 'Thank You' for the support so generously given to the parish in the past.

We will be serving [e.g. coffee and donuts]/[*insert alternative catering arrangements*] before the service so do please join us then. During the presentation we will look at the good news stories of our parish and the impact we have in our community as well as introduce an outline of our vision and plans for the future. Please come along to find out how you can play your part in the future mission and ministry of our local church. Nobody will be asked to make any commitments or donations at this service, but just to reflect on what has been shared and consider how they can best help. A supportive response can make a real difference to the future ministry of our parish.

On [the following two Sundays after this presentation]/[*insert dates of teaching Sundays*] there will be biblical teaching on Generosity, and a chance to prayerfully respond.

Please keep your enclosed invitation card as a reminder of the dates, but it would be most helpful if you could return the Reply Card to church [*insert name to whom/location to which card should be returned*] for catering purposes, by the [*insert date*].

We do hope that you will be able to come, and can promise each of you a warm welcome to this important occasion.

Yours sincerely

[Rector]/ [Giving Co-ordinator]

Generous Giving Programme

Example Invitation & Reply Card



*You are warmly invited to a
Special Service and Presentation to
launch our Generous Giving Programme*

DATE: _____

VENUE: _____

TIME: _____

COFFEE & DONUTS WILL BE SERVED FROM 11AM



Please return to [*insert name of person/place/arrangements for returning cards*].

*I / We will attend the Generous Giving Programme
Launch Service on Sunday dd/mm/yyyy*

NAME(S): _____

ADDRESS: _____

PHONE: _____

EMAIL: _____

How can I play my part?

Give a little more:

To reach our financial goals, our average giving needs to rise from 60p/c a day to £/€1.00 a day – that's only an extra 40p/c a day or £/€2.80 a week (the cost of a cappuccino from Costa!). If you have never given regularly to the Church we'd love you to consider starting to give something.

Maximise your giving:

If you are a tax payer, have you registered with Gift Aid (NI) or signed an Enduring Certificate (ROI)? You can significantly increase your giving without any extra cost to yourself. Relevant forms available from the Treasurer or Giving Co-ordinator.

Do you give by freewill offering envelope? Would you consider signing up for Standing order or Direct Debit? This way you don't need to worry about having the right cash or bringing your envelope every week and the church will still benefit from a guaranteed payment each month.

Give of Yourself

Your time, your talents, your gifts and your prayers are invaluable to our parish. Without these we would be unable to make a difference to the lives of so many people. Please consider getting involved or volunteering in our ministries, and please continue to pray that God will direct and lead us.

What next?

Teaching Series

on Generosity:

Sunday 3rd May at 11am

and

Sunday 10th May at 11am

There will be more information and an opportunity to respond at both of these services.

Celebration Sunday

Sunday 7th June at 11am

We would encourage you to **REFLECT**, to **CONSIDER**, and to **PRAY** but most importantly to play your part in the future mission and ministry of our parish and to **ACT**.

For further details or information about the Generous Giving Programme please see Mr John Brown, our Giving Co-ordinator



Anytown Parish Church
Anytown



**Generous
Giving
Programme**

Where are we now?

The vision of our parish is:

‘To know Jesus and make him known.’

Every week in our parish, with your support, we:

- Welcome and work with 100 young people at Youth Fellowship and Youth Club.
- Inspire and excite 80 children about Jesus at Sunday school.
- Serve 200 cups of tea at the Seniors Ministry.
- Visit 25+ people who are ill or lonely.
- Support a family who is grieving the loss of a loved one.
- Run an Alpha Course for 20 people who are seeking to learn more about God and faith.
- Support 50 young families at Toddler group.
- Enjoy worship, host 10 home groups and pray for our faith family.
- Support 3 international charities: Habitat for Humanity, SAMS Ireland and our link church in Romania, as well as many local charities.
- Volunteer in the local food bank and provide support for many families who are struggling financially.

Over the past year we have seen our church family grow, and have enjoyed fellowship and friendship through social activities and special worship times. We thank God for his many blessings, and for helping us share His love in our local community.

Give thanks to the Lord, for He is good; His love endures forever. (1 Chronicles 16:34)

Where do we want to be?

As part of our Generous Giving Programme, we have been discerning God’s heart for our parish, and through a vision-clarity process we have identified 3 mission and ministry priorities for the next 3 years:

- **Employ a youth worker**
Our youth ministry is run by volunteers but we feel we want to invest further in this invaluable work by identifying and appointing a member of staff to lead this ministry.
- **Begin a lunch club once a month**
There are many people who live in the vicinity of our church who are lonely and feeling vulnerable. This volunteer ministry will provide not just a hot meal once a month but a chance for people to form new friendships, and get out of the house.
- **Identify and train up volunteers for our existing ministries.**
Our parish touches so many lives and we couldn’t have such an impact without the gifts, skills and passion of volunteers. We always need more, and would like to invest in helping people to discover their spiritual gifts and to use them in the right place. Everyone is part of the body of Christ and has something to offer.

There are financial implications to these plans and priorities, and we ask that you would consider helping to make our plans a reality through your planned giving.

Financial overview

Our parish relies upon the generous financial support from those who regularly attend church, and around 78% of our income comes through regular planned giving.

Our church family consists of 700 families, however only 420 contribute financially. Of these 420 families, 200 of them contribute less than £/€2 a week.

The average weekly giving per family is 76p/c per day.

Currently only 49% of families who give are part of a tax-efficient giving scheme. This means we are missing out on thousand of pounds/euros from the government each year.

It takes around £150,000 a year to run our parish.

To employ a fulltime youth worker we would need to bring in another £20,000 per year.

If every family which already gives regularly (420), gave an extra £/€2 per week, our giving would rise by £/€43,000 a year!!

If every family in our parish (700) committed to giving regularly, think how it could impact our town and community with God’s love.

**We need your help to continue
‘to Know Jesus and
make Him known’!**



Generous Giving Programme

[Insert Parish Church Name]

My Response

Dear [insert name of Giving Co-ordinator],

Thank you for the invitation to review and renew my financial support to the life and ministry of our church. God has given me everything I own, therefore in response to his generosity I would like to contribute to the life and ministry of our parish community.

- I would like to find out more about how I can get involved and use my gifts.

I have decided to increase my monthly giving by an additional:

- £/€5.00
- £/€10.00
- £/€15.00
- £/€20.00
- £/€_____ (other amount)
- Personal circumstances mean that I cannot give any additional money at this time. I am supportive and will review my giving when circumstances change.

*You will be enriched in every way because of your great generosity.
1 Chronicles 9:11*



Generous Giving Programme

[Insert Parish Church Name]

- I am a taxpayer and would like to ensure tax on my giving can be reclaimed. I've completed the [Gift Aid Declaration] or [Enduring or Annual Certificate] (attached).
- I would like to *start* to give by Freewill Offering envelopes.
- I would like to *continue* to give by Freewill offering envelopes.
- I would like to *start* to give by Standing Order and have completed the Mandate (attached).
- I would like to *continue* to give by Standing Order and have completed the Mandate (attached).
- I would like information on leaving a legacy gift to the church in my Will.

Name _____

Address _____

Postcode _____

Phone _____

Email _____

Please return this form to the Giving Co-ordinator in the envelope provided.
Please respond *before* our Celebration Sunday on [insert date].

All responses will be treated as confidential.

CHURCH NAME

My offering is made directly to the church in thanksgiving to God and to support its ministry and mission.

“God loves a cheerful giver”

2 Corinthians 9:7

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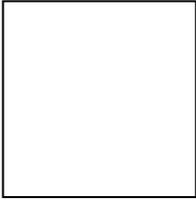
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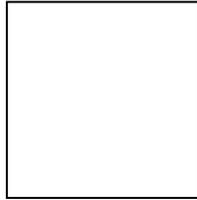


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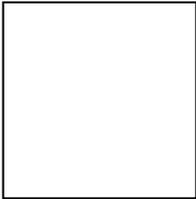


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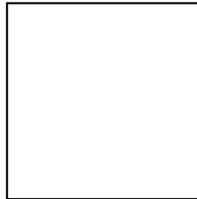


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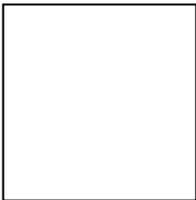


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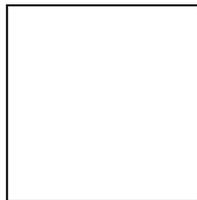


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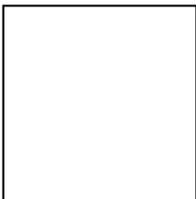


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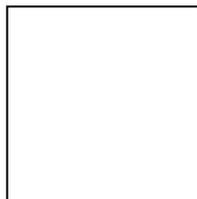


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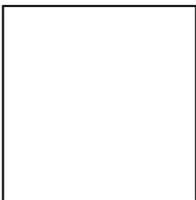


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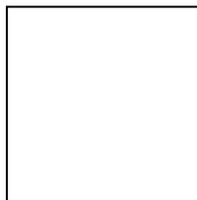


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GIFT AID DECLARATION (PAST, PRESENT & FUTURE DONATIONS)

Boost your donation by 25p of Gift Aid for every £ you donate.

Gift Aid is claimed by the parish from the tax you pay for the current tax year. Your address is needed to identify you as a current UK taxpayer - please ensure you have inserted your postcode.

Name of Parish _____

Church of Ireland: Diocese of _____

I confirm I have paid or will pay, an amount of Income Tax and/or Capital Gains Tax for each year (6 April to 5 April) that is at least equal to the amount of tax that all the Charities and Community Amateur Sports Clubs (CASCs) that I donate to will reclaim on my gifts for that tax year.

I understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year, it is my responsibility to pay any difference. (*See over for more information*)

Please treat as Gift Aid donations all qualifying gifts of money made:

Today In the past 4 years In the future Please tick all boxes that apply.

I intend to pay the sum of £ _____ **per annum** to the above named parish (*optional*)

DONOR'S DETAILS (BLOCK CAPITALS PLEASE)

Title _____ First name or initial(s) _____

Surname _____

Full address _____

POSTCODE _____

Signed: _____ Date ____/____/____

Please notify the parish if you:

Want to cancel this declaration

Change your name or home address

No longer pay sufficient tax on your income and/or capital gains

Note for Parish Treasurer/Gift Aid Secretary

Is this declaration replacing an existing declaration? If so, please quote the old reference number: _____

Which anniversary (month) would you like to assign to this individual? (This will be the month that this individual will appear on your cash proof annually.)

RCB Office Use:

Donor reference: _____

GIFT AID DECLARATION

NOTES

Notes for the person giving

- You must have paid, or will pay, an amount of Income Tax and/or Capital Gains Tax for each tax year your declaration covers (6 April to 5 April) that is at least equal to the amount of tax that all the charities and Community Amateur Sports Clubs (CASCs) that you donate to will reclaim on your gifts for that tax year. Other taxes, such as VAT and Council Tax, do not qualify.
- From 6 April 2011 the tax reclaimable is 25p for each £1 you give.
- If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self Assessment tax return or ask HM Revenue and Customs to adjust your tax code.
- If you are unsure whether your gift qualifies for Gift Aid tax relief you should enquire at your local tax office.
- Please notify the Parish Treasurer/Secretary if you wish to cancel this declaration, if you change your name or home address, or if you no longer pay sufficient tax on your income and/or capital gains.

Notes for the Parish Treasurer

- There is no minimum or maximum limit to the total yearly value that may be gift aided.
- The only requirement is that the individual must pay an amount of Income Tax and/or Capital Gains Tax for each tax year covered by the declaration (6 April to 5 April) that is at least equal to the amount of tax that all the charities and Community Amateur Sports Clubs (CASCs) that they donate to will reclaim on their gifts for that tax year. Other taxes, such as VAT and Council Tax, do not qualify.
- It is advisable that you let the person giving have a copy of these notes for his/her reference.
- The declaration form may be signed by the donor or certified on his/her behalf by a member of the parish.
- The declaration form may be signed i) in advance of payment, ii) at the time of payment or iii) after the payment is made (but no later than four years afterwards)
- Claims for repayment of the tax may not be made until the form is signed.

This completed form should be forwarded by post to:

Gift Aid Administration, Church of Ireland House, Church Avenue, Rathmines, Dublin 6

Telephone: 00353 1 497 8422

Email: finance@rcbdub.org



This form should be completed by donors who are **individuals** in respect of donations made on or after 1 January 2013.

N.B. You should **not** complete Form CHY4 (Annual Certificate) for a tax year if you have completed, or intend to complete, a Form CHY3 for the same year.

PLEASE REFER TO THE NOTES OVERLEAF BEFORE COMPLETING THIS FORM

COMPLETE IN BLOCK LETTERS

PART A

Name of Donor:

PPS Number:

Address:

Phone No.:

Email Address:

PART B

Name of eligible charity or other approved body (hereinafter referred to as an approved body):

First tax year to which this certificate applies (cannot be earlier than 2013):

PART C

- I certify that this certificate is valid for the tax year specified in Part B and each of the four following tax years, unless I notify the approved body of its earlier cancellation.
- I understand that the approved body referred to in Part B may apply to the Revenue Commissioners for tax relief under section 848A TCA 1997 in respect of donations made by me to that body during the lifetime of this certificate and that any tax repaid to the body shall not be repaid to me or to any other approved body.
- I grant permission to the approved body referred to in Part B to use my PPS Number for the purpose of claims for tax relief under section 848A TCA 1997 in respect of donations made by me to that body during the lifetime of this enduring certificate or a renewed enduring certificate.
- I understand I must advise the approved body immediately of any change in my circumstances that would affect the body's entitlement to claim tax relief in respect of my donations.
- I am aware that for **the purposes of tax relief under section 848A TCA 1997** on donations to an approved body—
 - (a) I must be resident in the State for each tax year in which I make a donation.
 - (b) A donation, or donations, must amount in aggregate to at least €250 in a tax year and be in the form of money and/or designated securities and that tax relief will not apply to the aggregate of my donations to an approved body or bodies in a tax year in excess of €1,000,000.
 - (c) Neither I, nor any person connected with me, can receive a benefit from the approved body in consequence of making a donation.
 - (d) A donation cannot be subject to a condition as to repayment nor can it be conditional on, or associated with, the acquisition of property by the approved body other than by way of gift, from me or a person connected with me.
 - (e) The amount of my aggregate annual donations to an approved body (or bodies) with which I am associated (see Notes) will be restricted to an amount equal to 10% of my total income for the tax year in question and tax relief will not apply to any donations in excess of that amount.
 - (f) I must pay income tax and/or capital gains tax for any tax year in which I make donations of an amount equal to the income tax on the grossed up amount of the donations in order for the approved body to receive a refund of tax (see Notes).

Please tick ✓ the box if you are associated with the approved body named in this certificate (see Notes)

Signature:

Date:
(DDMMYY)

PLEASE FORWARD YOUR COMPLETED CERTIFICATE TO THE APPROVED BODY REFERRED TO IN PART B.

Notes to CHY3 Cert

Background

Tax relief under section 848A TCA 1997 in respect of donations made on or after 1 January 2013 by individuals (whether self-assessed or PAYE-only taxpayers) to an approved body is allowed to the approved body rather than to the donor.

A donation which satisfies the conditions of section 848A is grossed up at the specified rate (currently 31%) and the approved body is deemed for the purposes of the relief to have received the grossed up amount net of tax deducted at the specified rate.

For example, Joan makes a cash donation of €1,000 to an approved body in the tax year 2013. Under the tax relief scheme the body is deemed to have received a donation of €1,449.27 (i.e. €1,000 grossed up at 31%) less tax deducted of €449.27. On the assumption that Joan has paid income tax for 2013 of at least €449.27, the approved body can obtain a refund of that amount from Revenue after the end of the tax year 2013.

The amount repaid to an approved body for any tax year **cannot** exceed the amount of tax paid by the donor for that year. For example, if Joan's income tax liability for 2013 is €350 (which she has paid), the repayment to the approved body is restricted to that amount.

Joan is not entitled to a repayment of any part of the tax that has been repaid to the approved body.

What are "approved bodies"?

The following are approved bodies for the purposes of the scheme of tax relief for donations under section 848A of, and Schedule 26A to, the TCA 1997-

- An "eligible charity", i.e. any charity which is authorised in writing by the Revenue Commissioners,
- Educational institutions or bodies including primary, second level or third level, as described in Part 1 of Schedule 26A TCA 1997,
- A body approved for Education in the Arts by the Minister for Finance as described in Part 2 of Schedule 26A TCA 1997,
- A body to which section 209 TCA 1997 applies.

Please refer to the Revenue website at www.revenue.ie for lists of resident and non-resident charities authorised for the purposes of the donations relief scheme.

When should I complete an Enduring Certificate?

You should complete an Enduring Certificate if you wish to allow an approved body claim tax relief in respect of donations you make to that body during the lifetime of the certificate.

An Enduring Certificate is valid for a period of 5 years, unless you cancel it before the end of that period.

You should complete this form **only** in respect of donations for 2013 and subsequent years.

If you are a PAYE-only taxpayer you should complete a CHY2 Cert in respect of donations made in 2012 and prior years.

Can I complete more than one Enduring Certificate?

Yes. You can complete an Enduring Certificate in respect of some or all of the approved bodies to which you make donations.

Can I renew an Enduring Certificate?

Yes. The qualifying body may contact you in this regard. Alternatively, you can advise the body in question to renew the certificate.

What if I do not want to complete an Enduring Certificate?

There is no obligation on you to complete any certificate in respect of your donations. However, you can complete an Annual Certificate if you prefer to provide a certificate to an approved body on an annual basis.

Can I cancel an Enduring Certificate?

Yes, but you must notify the approved body of its cancellation.

What happens if my circumstances change during the lifetime of an Enduring Certificate?

You must advise the approved body immediately of any change in your circumstances that would affect the body's entitlement to claim tax relief in respect of your donations.

How do I know if I'm "associated" with an approved body?

You are associated with an approved body if at the time you make a donation you are an employee or member of that body, or of another approved body which is associated with the first approved body.

One approved body is associated with another approved body if it could reasonably be considered that-

- The activities carried on by both bodies are, or can be, directed by the same person or by broadly the same group or groups of persons, or
- The same person or broadly the same group or groups of persons exercise, or can exercise, control over both bodies.

What should I do if I become, or cease to be, associated with an approved body during the lifetime of an Enduring Certificate?

You should advise the approved body immediately where the status of your association with that body alters during the lifetime of your enduring certificate.

What are the implications of being associated with an approved body?

Where the aggregate of your donations in a tax year to all approved bodies with which you are associated exceeds 10% of your total income for that year, the amount of those donations that exceed the 10% limit are not considered relevant donations for the purposes of the scheme and tax relief is not available on that excess amount.

What are designated securities?

These are quoted shares and debentures.

Are there limits for tax relief purposes on the amount I can donate in any tax year?

Yes, there are some limits in place **for tax relief purposes**.

A donation to any one approved body must, for tax relief purposes, be in the form of money and/or designated securities and amount in aggregate in a tax year to at least €250.

The aggregate of donations to an approved body or bodies in any tax year from 2013 onwards cannot, for tax relief purposes, exceed €1,000,000.

If you are associated with an approved body, or bodies, the amount of your donations to that body, or bodies are, for tax relief, limited to an amount equivalent to 10% of your total income.

N.B. These limits apply **solely** for the purposes of tax relief on your donations – they **do not** impose any restrictions on the amount you can donate to an approved body.

Can I reclaim tax that has been repaid to an approved body?

No. Where an approved body has received a repayment of tax in respect of donations you made to that body, you **cannot** subsequently have any part of that tax repaid to you.

Further Information

You can obtain further information on the Donations Scheme from our website www.revenue.ie or from the Office of the Revenue Commissioners, Collector-General's Division, Charity Claims Unit, Government Offices, Nenagh, Co. Tipperary.

Phone: 067 63104 or Lo Call 1890 666 333, Email: charityclaims@revenue.ie or from your local Revenue Office.

Annual Certificate
SECTION 848A TAXES CONSOLIDATION ACT (TCA) 1997
TAX RELIEF FOR DONATIONS TO ELIGIBLE CHARITIES AND
OTHER APPROVED BODIES



This form should be completed by donors who are **individuals** in respect of donations made on or after 1 January 2013.

N.B. You should **not** complete Form CHY4 for a tax year if you have completed, or intend to complete, a Form CHY3 (Enduring Certificate) for the same year.

PLEASE REFER TO THE NOTES OVERLEAF BEFORE COMPLETING THIS FORM
COMPLETE IN BLOCK LETTERS

PART A

Name of Donor:

PPS Number:

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Address:

Phone No.:

Email Address:

PART B

Name of eligible charity or other approved body (hereinafter referred to as an approved body):

PART C

I certify that for the tax year-

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- I have made a donation of € to the approved body referred to in Part B (**for tax relief purposes**, donations to an approved body must amount to at least €250 in a tax year),
- The donation was made in money and/or designated securities,
- I was resident in the State for that tax year,
- I have paid or will pay Income Tax/Capital Gains Tax of an amount equal to Income Tax on the grossed up amount of my donation,
- Neither I nor any person connected with me have received or will receive a benefit from the approved body in consequence of having made this donation, and
- The donation was not subject to a condition as to repayment nor conditional on, or associated with, the acquisition of property by the approved body other than by way of gift, from me or a person connected with me.

I am aware that-

- The approved body referred to in Part B may use my PPS Number for the purpose of a claim for tax relief under section 848A TCA 1997 on foot of this annual certificate or a renewed annual certificate,
- The aggregate amount of my donations to an approved body or bodies in a tax year cannot, **for tax relief purposes**, exceed €1,000,000,
- The amount of my aggregate annual donations in a tax year to an approved body or bodies with which I am associated are, **for tax relief purposes**, restricted to an amount equal to 10% of my total income of that year (see notes), and
- I must advise the approved body immediately of any change in my circumstances that would affect the body's entitlement to claim tax relief in respect of my donations.

Please tick ✓ the box if you are associated with the approved body named in this certificate (see Notes)

Signature:

Date:

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(DDMMYY)

PLEASE FORWARD YOUR COMPLETED CERTIFICATE TO THE APPROVED BODY REFERRED TO IN PART B.

Notes to Annual Certificate CHY4 Cert

Background

Tax relief under section 848A TCA 1997 in respect of donations made on or after 1 January 2013 by individuals (whether self-assessed or PAYE-only taxpayers) to an approved body is allowed to the approved body rather than to the donor.

A donation which satisfies the conditions of section 848A is grossed up at the specified rate (currently 31%) and the approved body is deemed for the purposes of the relief to have received the grossed up amount net of tax deducted at the specified rate.

For example, Joan makes a cash donation of €1,000 to an approved body in the tax year 2013. Under the tax relief scheme the body is deemed to have received a donation of €1,449.27 (i.e. €1,000 grossed up at 31%) less tax deducted of €449.27. On the assumption that Joan has paid income tax for 2013 of at least €449.27, the approved body can obtain a refund of that amount from Revenue after the end of the tax year 2013.

The amount repaid to an approved body for any year **cannot** exceed the amount of tax paid by the donor for that year. For example, if Joan's income tax liability for 2013 is €350 (which she has paid), the repayment to the approved body is restricted to that amount.

Joan is not entitled to a repayment of any part of the tax that has been repaid to the approved body.

What are "approved bodies"?

The following are approved bodies for the purposes of the scheme of tax relief for donations under section 848A of, and Schedule 26A to, the TCA 1997-

- An "eligible charity", i.e. any charity which is authorised in writing by the Revenue Commissioners,
- Educational institutions or bodies including primary, second level or third level as described in Part 1 of Schedule 26A TCA 1997,
- A body approved for Education in the Arts by the Minister for Finance as described in Part 2 of Schedule 26A TCA 1997,
- A body to which section 209 TCA 1997 applies.

Please refer to the Revenue website at www.revenue.ie for lists of resident and non-resident charities authorised for the purposes of the donations relief scheme.

When should I complete an Annual Certificate?

You should complete an Annual Certificate if you wish to provide an approved body with the necessary information on an annual basis to support a claim for tax relief in respect of your donations to that body.

You should complete this form **only** in respect of donations for the tax year 2013 and subsequent years.

If you are a PAYE-only taxpayer you should complete a Form CHY2 Cert in respect of donations for 2012 and prior tax years.

Can I complete more than one Annual Certificate?

Yes. You can complete an Annual Certificate in respect of some or all of the approved bodies to which you make donations.

What if I do not want to complete an Annual Certificate?

There is no obligation on you to complete any certificate in respect of your donations. However, you can complete an Enduring Certificate if you prefer to provide a certificate to an approved body for a period of up to 5 years.

Can I renew an Annual Certificate?

Yes. The qualifying body may contact you in this regard. Alternatively, you can advise the body in question to renew the certificate.

Are there limits for tax relief purposes on the amount I can donate in any tax year?

Yes, there are some limits in place **for tax relief purposes**.

A donation to any one approved body must, for tax relief purposes, be in the form of money and/or designated securities and amount in aggregate in a tax year to at least €250.

The aggregate of donations to an approved body or bodies in any tax year from 2013 onwards cannot, for tax relief purposes, exceed €1,000,000.

If you are associated with an approved body (see note below), the amount of your donations to that body are, for tax relief purposes, limited to an amount equivalent to 10% of your total income of the tax year in question.

N.B. These limits apply **solely** for the purposes of tax relief on your donations – they **do not** impose any restrictions on the amount you can donate to an approved body.

How do I know if I am “associated” with an approved body?

You are associated with an approved body if at the time you make a donation you are an employee or member of that body or of another approved body which is associated with the first approved body.

One approved body is associated with another approved body if it could reasonably be considered that-

- the activities carried on by both bodies, are or can be directed by the same person or by broadly the same group or groups of persons, or
- the same person or broadly the same group or groups of persons exercise or can exercise control over both bodies.

What are the implications of being associated with an approved body?

Where the aggregate of your donations in a tax year to all approved bodies with which you are associated exceeds 10% of your total income for that year, the amount of those donations that exceed the 10% limit are not considered relevant donations for the purposes of the scheme and tax relief is not available on that excess amount.

What are designated securities?

These are quoted shares and debentures.

Can I reclaim tax that has been repaid to an approved body?

No. Where an approved body has received a repayment of tax in respect of donations you made to that body, you cannot subsequently have any part of that tax repaid to you.

Further Information

You can obtain further information on the Donations Scheme from our website www.revenue.ie or from the Office of the Revenue Commissioners, Collector-General's Division, Charity Claims Unit, Government Offices, Nenagh, Co. Tipperary.

Phone: 067 63104 or Lo Call 1890 666 333, Email: charityclaims@revenue.ie or from your local Revenue Office.

A FRAMEWORK FOR GENEROSITY

- shared with kind permission by St Paul's Church, Lisburn

The scope of Christian giving is not just financial giving, but how we use money, time, talents and possessions God has entrusted to us. Generous giving should become second nature to us, and as it becomes so, our living and our giving are transformed to start to resemble the overflowing generosity of God.

- **A priority** – assessed in relation to all our income, and not simply the spare change after all other needs have been satisfied. (*Deut 26:2-3, 1 Cor 16:2, 2Cor 8:5*)
- **Prayerful** – an act of worship and thanksgiving. (*1 Chron 9:7*)
- **Planned** – but not prescriptive and allowing spontaneity. (*2 Cor 9:7*)
- **Proportionate** – a realistic proportion of our income. (*1Cor 16:2, 2 Cor 8:11-13*)
- **Given in Community** – both for the needs of others, and given with others for a common purpose (*Acts 2:42-47, 2 Cor 8:13-14*). The acts of giving shifts our focus from individual wants to a communal need, demonstrating solidarity with the poor and a commitment to working together in mission.
- **Sacrificial** – there is a cost to our giving. As a result, we will have less to spend on ourselves, and our lifestyles will reflect this. Those who have more to give will give more. (*Luke 21:1-4, 2 Cor 8:2-4*)
- **Cheerfully and joyfully given** – whether giving money, time or hospitality, we give with grace from the heart, as an offering to God. (*2 Cor 9:7-8*).

The 6 stages of Giving

(1) SURVIVAL

I give a bit when I'm asked, but the church should be there for me if I need it (hopefully I won't)!



(2) SUPERMARKET

I'm happy to pay towards the cost of the bits of the church that I want and enjoy. I feel safe and unchallenged – a customer.



(3) SUPPORT

The work of the church is important so I'll support it. I have a need to belong.



(4) SUBSCRIPTION

I see myself as a member and I want to contribute my fair share of the costs. I have an identity – I'm recognised and playing my part.



(5) SUBMISSION

Being a disciple I should put God first in my life. My giving responds to God and not just the needs of the church.



(6) SACRIFICE

My Christian calling is to be Christ-like and so naturally I give joyfully and sacrificially – following Christ.

Challenge: To encourage each of these groups to give:



REGULARLY

- Building relationships
- Good Communication
- Asking them!



REALISTICALLY

- Explaining costs
- Link to mission and vision
- Biblical Teaching



PROPORTIONATELY

- Biblical Teaching
- a Deeper faith experience

Generous Giving Beliefs – from www.generousgiving.org

1. Giving is a heart issue

[Where your treasure is, there your heart will be also. - Matthew 6:21](#)

The things in which we invest our time, money, and energy are the things that matter to us most. They are often things that ensnare us and stand in the way of liberation from materialism.

Remarkably, in much the same way your treasure reveals your heart, the purposeful reallocation of your 'treasure' can be an effective way to guide your heart away from earthly values and toward more meaningful treasure.

Giving is not only an indication of where your heart is, but it is also a means of moving your heart toward God's generosity in a never-ending journey, expanding your heart to hold all the blessing of a closer walk with God.

2. God gave first

[For God so loved the world that he gave his one and only son... - John 3:16](#)

God is the most generous of all givers. God's grace has blessed us with goods, skills, and opportunities to generate what we need in our lives and a rich and wonderful world in which to live out His calling. God gave at a level beyond anything we can fully comprehend, He gave His Son, whose life bought our salvation.

God's giving to us is like the filling of a cup, and our giving to others reveals the cup running over. In the context of our own blessings and gratefulness, we learn to be generous givers. We didn't earn it; we never will. God's gift was the highest demonstration of unconditional generosity:

[But God demonstrates His own love for us in this: While we were still sinners, Christ died for us. - Romans 5:8](#)

3. God owns it all

[The earth is the Lord's, and everything in it. - Psalm 24:1](#)

A money manager administers assets for the benefit of the owner, but is always aware that the funds he or she handles are not his own. With all the attention you place on managing our money, how does my perspective change when I come to understand that it is not my money, my wealth, my possessions, or my assets, but instead, that it all belongs to God?

We are God's money managers. The wealth of the earth and all its resources are entrusted to us, with the privilege to be stewards of its wise use. Our money is never ours to spend as we choose; our money is God's to spend as He directs.

4. We are to seek first the Kingdom of God

But seek first His Kingdom and His Righteousness and all of these things will be given to you as well. - Matthew 6:33

Jesus assures us that we do not have to worry about our earthly life because God has promised always to take care of us. And with earthly matters in God's control, we are free to pursue more spiritual matters, seeking first and above all else, God's kingdom and His righteousness through spiritual intimacy. Intimacy with Christ offers the highest levels of satisfaction both right now and for eternity.

5. Heaven, not Earth, is my home

But our citizenship is in heaven. And we eagerly await a Savior from there, the Lord Jesus Christ. - Philippians 3:20

Life is short. Eternity is long. And my home is in heaven, where I will spend eternity. This simple yet radical thinking begs an important question: Why should I invest so much time, energy, and resources in what is short? Why should I focus on my (or even my children's) very temporary life here on earth, when heaven is real and coming and calling?

It isn't wrong for us to spend money on things that are temporary, however, if we have an eternal perspective and understand that heaven, not earth, is our real home, then we know that we can store up treasures in heaven where we (and those reached with the gospel) can experience them for eternity. A life of generosity—for all who know Christ—means the opportunity to draw closer to God, now, and in eternity. It means joy, a fulfilled heart, and the potential to store up treasures in heaven.

6. Giving brings joy

... remembering the words of the Lord Jesus himself said: 'It is more blessed to give than to receive. - Acts 20:35

Our life becomes joyful, fulfilling, and purposeful as we live in God's calling. Joy is experienced in the act of giving, but even more so in the alignment of your heart with God's will. As generosity comes into your heart, it blesses you in ways you know in the moment, in ways you recognize over a lifetime, and in ways that are revealed to you only in eternity. Generosity enables you to live in the joy of a "life that is truly life."

"In this way they will lay up treasure for themselves as a firm foundation for the coming age, so that they may take hold of the life that is truly life." (1 Timothy 6:19).



Generous Giving Programme

EXAMPLE THANK YOU LETTERS FOR PARISH USE

Insert Parish Name
Insert Parish Church Address
(Use parish headed paper, if available)

Insert Date

Handwrite
'Dear Name'

Thank you for your continued generous support for the mission and ministry here at [*insert Parish Name*] through your regular giving. Our records show that you gave [*insert amount*] during the past year.

As a result of your giving, along with that of others, we have been able to achieve a number of important things during the last year. These have included:

- ♦ paying our Parish Assessment in full, which pays for the costs of the ministry we receive.
- ♦ running a [*insert community activity, e.g. successful youth club, with over 50 young people coming most weeks.*]
- ♦ offering training and resources for our [*insert details of parish personnel and activities, e.g. new pastoral visiting team who visit the elderly*]
- ♦ installing/repairing [*insert church building requirement e.g. a new sound system, to ensure that we keep our building in good shape.*]
- ♦ donating over [*insert amount*] to support our chosen mission agencies and charities, [*insert names of mission agencies and charities*].

Once again, thank you for your generosity. Your continued support and encouragement is greatly appreciated.

Yours sincerely

(Sign personally)

Insert Name
Insert position Gift Aid Officer / Treasurer / Rector

Insert Parish Name
Insert Parish Church Address
(Use parish headed paper, if available)

Insert Date

Handwrite 'Dear Name'

Thank you!!

I am writing to all of our regular givers to say "Thank you"! Your generous giving is a vital enabler of the mission and ministry of [**insert Parish Name**].

Last year we were able to:

- ♦ [**insert update on activities undertaken**, e.g. start a new youth club, with set up costs of over [insert amount]];
- ♦ pay our Parish Assessment in full, contributing our share of the costs of ministry in the diocese;
- ♦ [**insert maintenance or improvement work undertaken** e.g. upgrade the kitchen in the church hall, and repair the church heating system. This ensures that we keep our building in good shape.
- ♦ donate over [**insert amount**] to support our four chosen mission agencies and charities, [**insert names of mission agencies and charities**].

All of this would not have been possible without the generous support of our regular givers. You are making a real difference – thank you!

Yours sincerely,

[**Signed**]

[**Insert Treasurer's name**]

Insert Parish Name
Insert Parish Church Address
(Use parish headed paper, if available)

Insert Date

Handwrite 'Dear Name'

On behalf of **[insert Parish Name]**, thank you!

As we draw together our Accounts for **[insert year]**, I am writing to thank all our regular givers for their generous support. Regular givers like you are absolutely vital to the mission and ministry of **[insert Parish Name]**.

Thank you for your own regular gifts of **[insert amount]** during **[insert year]** [**which, with Gift Aid/tax relief (if relevant)**], came to **[insert amount]**. Your committed support over the last year has enabled us to:

- ♦ Pay our Parish Assessment [*in full*], which pays for the costs of the ministry we receive;
- ♦ Continue to employ our [**E.g. Youth Group Co-ordinator**; **include relevant 'good news story'**, e.g. *our youth group is flourishing with 20+ young people attending regularly*];
- ♦ Run our [**insert outreach or community based activity e.g. soup kitchen for the homeless, serving hot food to those in need each winter**];
- ♦ Undertake [**insert parish maintenance or equivalent works undertaken; e.g. vital repairs to the roof, and re-fit our rather historic toilets!**]
- ♦ Donate **[insert amount]** to support our chosen mission agencies and charities, including [**insert names of mission project and/or charities supported, including any individuals on overseas or local mission**].

Looking ahead, it is good to know that we can plan for the parish's continued growth with confidence. This is due to the generosity of regular givers like you. Once again, thank you very much for your own regular and committed giving.

Yours sincerely,

[Signed]

[Insert Rector's name]

Annual Review of Giving - Survey for Select Vestries

The select vestry should use this survey to review the parish's practice on stewardship matters, and to identify and prioritise areas for development.

All vestry members should complete this form ahead of the select vestry meeting at which this survey will be discussed. Please remember to bring your completed survey to the meeting with you as a basis for discussion.

(1) When did you last hear a sermon that included a message on stewardship, generosity and giving money?

- Within the last 6 months Within the last year Within the last 3 years
 Within the last 5 years Don't know.

Teaching and preaching on matters of generosity and stewardship are essential if we are to learn to live generously as disciples of Jesus. It's not just about giving, nor just about money – but to help us gain insight into the amazing generosity of God, and seek to respond to it. We would recommend teaching on generous giving at least once a year.

(2) When thinking about how your church communicates with givers, which of the following do you talk about?

- Giving as response to God's generosity The costs and financial needs of the church
 Giving to support a clearly articulated vision for the future
 Giving in the context of discipleship
 The importance of giving in enabling the church's mission and ministry

All too often, churches focus on their operational cost or budget shortfall, but givers need to hear how giving is connected to faith and what their giving enables the parish to achieve in terms of both current ministry and future vision.

(3) When did the vestry last send a thank you letter to planned givers (those who give by FWO envelopes or by Standing Order)?

- Within the last year Within the last 3 years Within the last 5 years
 Don't know

It is good practice to send personal thank you letters to all your planned givers. This lets your givers know they are valued, acknowledges their contribution, and offers a perfect opportunity to explain the impact that their giving has on your church's mission and ministry.

(4) When did the vestry last ask the congregation to review their giving?

- Within the last year Within the last 3 years Within the last 5 years
 Don't know

It is good practice to review giving on an annual basis, rather than every 3 to 4 years or more. It keeps the focus on giving and reminds us that it is a key element of discipleship.

(5) Has the vestry agreed a policy on legacy gifts and communicated this to the members of the parish?

- Yes No Don't Know

Many parishes which have in place a policy on legacy gifts experience an increase in this type of giving as a result. Having a policy which is clearly communicated helps those people who wish to include a gift in their will to know that the church welcomes this and will use it wisely.

(6) Are the givers in your parish giving in the most tax efficient way?

- Yes No Don't Know

Tax refund schemes for charitable bodies allow parishes to claim tax relief on donations made by tax payers. These extra funds can make an enormous difference to a parish. However, if parishioners who are tax payers donate but are not signed up to the relevant scheme (Gift Aid Declaration in Northern Ireland or Enduring or Annual Certificates in the Republic of Ireland) their parishes are missing out on valuable income. More information is available at www.ireland.anglican.org/parish-resources.

(7) Are you claiming on the Small Donations Scheme (NI only)?

- Yes No Don't Know

This is an easy way of boosting parish income. Under the Small Donations Scheme in Northern Ireland, the parish can claim 25% tax relief on small cash donations of £20 or less (on up to £8,000 per year).

Priorities for Action:

Please identify up to three of the above points which are priorities for action and record any relevant notes, plans or reminders below:
