

5. PLANNED GIVING

- 5.1 Introduction**
- 5.2 What is Meant by Planned Giving**
- 5.3 Advantages of Planned Giving**
- 5.4 Relationship of Planned Giving to Gift Aid**
- 5.5 Confidentiality**
- 5.6 Recording of Planned Giving Contributions**
- 5.7 Supply of Planned Giving Envelopes and Forms**
- 5.8 Preparation for a Planned Giving Appeal**
- 5.9 Programme for an Appeal**
- 5.10 Gift Aid Appeals**
- 5.11 Frequency of Planned Giving Appeals**
- 5.12 Charities Act**
- 5.13 Help!**

Appendix 1 Standard Promise Card

5.1 Introduction

In the Diocese of Arundel & Brighton, Planned Giving is promoted by the Gift Aid Office. Our help is available to all parishes in the Diocese, however large or small. We work solely by invitation.

Gift Aid and Planned Giving are the two sides of one coin. We must never concentrate so much on obtaining tax refunds via Gift Aid that we do not seek to maximise the main source of parish income – what parishioners give to the parish in the offertory collection or by regular cheques or banker's orders. Gift Aid adds icing to the cake, but Planned Giving enlarges the cake itself.

5.2 What is Meant by Planned Giving

“Planned Giving” is sometimes dismissed as a fancy name for packs of offertory envelopes. But while envelopes and bankers' orders are used in most planned giving systems, Planned Giving as we see it goes much deeper than this.

The basic message of Planned Giving is that each of us has a part to play in the work of our parish, which includes supporting it financially according to our means. If we are serious about our faith we will be serious about what we give to the church. What we give should be part of our regular budget, not just the change in our pocket on Sunday.

So Planned Giving is about giving a *realistic* amount *regularly* to one's church. It demonstrates an acceptance that as adult Catholics we are responsible for supporting and maintaining our parish. Seen in this way, offertory envelopes and banker's orders are ways of reminding parishioners of the need for their giving to be both realistic and regular.

5.3 Advantages of Planned Giving

It has been shown across the country that in all types and sizes of parish, an active Planned Giving scheme results in a higher level of giving and that, because of the greater regularity of giving, the parish is better able to plan and budget for the future.

Parishioners know they can give in confidence rather than in the open offertory plate. But more importantly they know they are accepting responsibility for the work of the parish and the maintenance of its properties.

5.4 Relationship of Planned Giving to Gift Aid

Planned Giving should be promoted separately from Gift Aid. Otherwise, non-taxpayers may be misled into thinking that Planned Giving does not apply to them. But there is no harm in suggesting Gift Aid as soon as someone has joined the Planned Giving scheme. Indeed, this should be done wherever possible.

Ideally, Planned Giving should be run by different personnel, to spread the load, though in a smaller parish this may not be practicable. But to ensure consistent recording (see paragraph 5.6), it is almost essential for the Gift Aid Organiser to have at least *some* involvement with the Planned Giving scheme.

5.5 Confidentiality

It should be stressed that as well as being voluntary, Planned Giving is completely confidential. Completed promise cards must be kept secure and seen only by the few parishioners who run the Planned Giving scheme, and records of amounts received must be kept confidential in the same way as Gift Aid records.

5.6 Recording of Planned Giving Contributions

Many Planned Givers will already be Gift Aiders, and others are likely to join Gift Aid later. Because of this likelihood, the recording requirements for Planned Giving are almost the same as for Gift Aid, and must be carried out with the same scrupulous care. Records must be kept by tax years rather than by calendar years.

If a new member of the Planned Giving scheme is already in the Gift Aid scheme, no additional recording is required. New Planned Givers who are not already in the Gift Aid scheme are provided with packs of numbered offertory envelopes and/or with banker's order forms, according to the contribution method(s) they chose on their promise cards. A register of all such donors must be maintained, showing:

Name, address and postcode. (Telephone number is useful.)

Method of payment and envelope number.

The other recording requirements are set out in paragraphs 2.3.2 to 2.3.7 inclusive of the Gift Aid Handbook, which apply equally to Planned Giving. (This Handbook is held by Gift Aid Organisers and also forms Section 4 of the Parish Administration Manual. Further copies can be obtained from the Diocesan Gift Aid Office. The Manual is held by parish priests and is on the Diocesan website, www.dabnet.org.)

Parishes will need to decide whether to record those Planned Giving contributions which are not Gift Aided in the same ledger or computer file as Gift Aided contributions, using envelopes numbered in the same series; or whether to have a separate series of envelopes and to record them (together with non-Gift Aided cheques and bankers' orders) in a separate ledger or file. Separate recording spreads the load, but is a complication when someone joins or drops out of the Gift Aid scheme. We recommend against separation. There are other ways of splitting the workload.

The importance of keeping accurate records cannot be stressed too strongly, especially if the contributions are Gift Aided. (Remember they can be Gift Aided retrospectively if they have been properly recorded.) The Inland Revenue demand that accurate records of all Gift Aided donations be maintained as part of the "audit trail".

Because Planned Givers may join Gift Aid retrospectively, it is essential to retain all envelopes for six years. Completed promise cards must be retained indefinitely.

5.7 Supply of Planned Giving Envelopes and Forms

The Gift Aid Office will arrange for the supply of packs of numbered envelopes to the parish. All the various forms – promise cards, standing order forms, etc. – can be provided free of charge by the Gift Aid Office. However, some parishes may wish to tailor-make their own promise cards, to include the parish's name. (NB the note on the Charities Act in paragraph 5.12.)

5.8 Preparation for a Planned Giving Appeal

A small working group of parishioners will be needed - perhaps about four people. It is useful if one is the Gift Aid Organiser, as this will help to ensure that the Planned Giving records meet Gift Aid requirements and will be usable to support retrospective Gift Aid claims.

The Gift Aid Office will supply sample material and literature – homilies, leaflets, promise cards, lay persons' talks etc. The working group should customise this material to suit the parish's own circumstances and requirements.

It is very important to prepare a convincing "sales pitch". It is no use just saying that the parish needs more money. If at present you are not making ends meet, supply figures that show this. Or if you need to provide for an expected major expense, explain what this is. Keep all figures and explanations simple.

Parishes often find that planning an effective appeal takes longer than they expect. The literature, talks and promise cards must be prepared and agreed, and extra offertory envelopes ordered. It is important to choose a time for the appeal when attendances at mass are likely to be greatest. Avoid school holidays and half terms.

Different leaflets should be printed on different coloured paper, so parishioners can see at once that they are different.

5.9 Programme for an Appeal

Although there are no hard and fast rules, the following programme has worked well in several parishes.

Weekend 1.

Parishioners are given two leaflets as they enter church, or with the newsletter. One, "The Parish and the Parishioner," explains the parish's need for money and says a few words about the laity's duty to share in the parish's mission and financial support. The other, "The Diocese of Arundel & Brighton", provides background to the "School and Diocesan levies" which are a major part of parish outgoings.

Ideally, the parish priest would give a special homily, explaining the liturgical meaning of the offertory of the mass and the connection between the offertory collection and the gifts of bread and wine. Stewardship in its widest sense would be explained, without the priest asking for money or talking about Planned Giving.

Weekend 2

Parishioners are given a third leaflet. This one has a short letter from the parish priest on the front, repeats the simple breakdown of parish finances on the inside, and explains Planned Giving on page 4.

During Mass, a short talk is given by a lay member of the working group (preferably well known to the parish, such as the Chairman of the Parish Council or the Chairman of the Finance Committee) to explain the ideas behind Planned Giving. S/he would ask parishioners to re-assess how much they should give, recommend the use of offertory envelopes and banker's orders, and warn that they will be asked to complete promise cards next Sunday.

Weekend 3

As each parishioner enters church s/he is handed a promise card, or the cards can be placed on the benches before mass. Another layperson (also a member of the working group) speaks during mass to recap briefly what was said before and guide the congregation through completion of the promise card.

Envelopes should be supplied, so parishioners who wish to hand in their promise cards under cover can do so. Some people will wish to take their cards away and return them later, and it should be made clear that this is acceptable.

Recognisable lay people should be in the church porch after mass to receive the promise cards and to answer any questions.

Weekend 4

Remind parishioners to return promise cards if they have not already done so.

Following the appeal it is important to act swiftly to supply an envelope pack and/or banker's order form to everyone who completed a promise card and does not already use one. The opportunity can be taken to ask quietly whether s/he is a taxpayer and can join the Gift Aid scheme. The Gift Aid Office can supply specimen letters. (Failure to tick the Gift Aid box on the promise card should not be taken as conclusive.)

Ideally the new envelope packs should be ready to hand to parishioners at mass on Weekend 4. They can then use them as soon as they wish. There is no need to have a specific start date.

5.10 Gift Aid Appeals

Unless Gift Aid recruitment is done on an individual basis in conjunction with issuing envelope packs and banker's order forms as suggested above, it is recommended that a Gift Aid Appeal is undertaken soon after a Planned Giving appeal.

5.11 Frequency of Planned Giving Appeals

As years go by, parishioners die or move away and newcomers must be recruited to Planned Giving. Also, existing Planned Givers need reminders from time to time to review their giving in line with inflation and with changes in their circumstances.

From experience it is recommended that parishes have a Planned Giving renewal every three years or so. Longer intervals are likely to result in too great a loss of potential revenue. Shorter intervals may cause resentment.

5.12 Charities Act

It is a criminal offence under the Charities Act 1993 not to disclose charitable status on any notice, advertisement or other document issued on behalf of a charity that can be construed as soliciting money. It is therefore essential that all leaflets, promise cards, envelopes, letterheads etc. that are used in connection with Planned Giving include the statement:

"The Arundel & Brighton Diocesan Trust is a registered charity no 252878"

5.13 Help!

For help, advice, literature and sample material contact the Gift Aid Office at:

Gift Aid Office
Bishops House
The Upper Drive
HOVE
East Sussex
BN3 6NE

Tel: 01273 859705
Fax: 01273 859713
Email: giftaid@dabnet.org

APPENDICES

STANDARD PROMISE CARD

This Parish is part of the Diocese of Arundel & Brighton - a Registered Charity no 252878

**In thanksgiving to God and to help the work of His Church in our parish,
I intend to give**

£
£

each week at the Offertory of the Mass, and/or

each month/quarter (*delete one*) by banker's order.

This is not binding and may be adjusted or cancelled at any time.

Signature Date

Title Full Name (block letters)

Address (block letters)

..... Post code

Telephone Email

Please tick this box if you are a taxpayer and would like the parish to reclaim tax under the Gift Aid scheme on what you give. A declaration form will be sent to you if you have not already completed one.

Data Protection Act 1998. The Parish and Diocese will use this information to keep you informed.