

## Financial Health Check

Name of Church:

Lead person:

<b><i>Where are we now?</i></b>
What is the current giving like in our church?
What is the total income by category?
What is the total expenditure by category?
Is there a budget for the current year?
What are the financial gaps/issues/concerns?



## ***Where would we like to be?***

Is there something we need to pay for or buy?

What income would be needed to achieve this?

Set a maximum of 3 SMART objectives: (you can always add more next year) for example:

- increase the number of planned givers to xx by xx,
- raise xx for repairs or projects etc. by xx
- Increase Gift Aid claimed from xx to xx by xx by promoting tax efficient giving or GASDS



***How will we get there?*** (see also, <https://www.parishresources.org.uk/giving/>)

Plan specific dates for events, examples below:

- A stewardship/generous giving programme e.g. [Giving in Grace](#)
- Some education about Parish Share and the churches' mission in the Diocese
- A planned giving scheme – Parish Giving Scheme
- A legacy event
- Pledge Sunday/Thanksgiving events/Gift Day
- A Giving in Memory programme
- Applying for grants
- Fundraising Activity
- Trading/Hire of facilities
- Costs savings plan
- Other plans:

What people/teams are needed to carry out these activities and do we need training?

How can we ensure Gift Aid GASDS is claimed back on new donations? Who will do it?

How will we communicate to people to support our Church? What is our case for support?

What publicity is needed for these events? Notices on notice boards, announcements in services, church calendar, parish magazine, church website, social media? Who is responsible?

## ***How will we get there?***

What ***literature and digital output*** is needed? Who has the skills?

- Leaflets, income vs expenditure, and information about your vision. Make a strong case for people to support you. Sample brochure included here: <http://www.givingingrace.org/The-Brochure>
- Parish Giving Scheme folders and Giving for Life/Living Generously leaflets
- Legacy literature
- Stewardship prayer cards and leaflets
- Gift aid forms and envelopes
- Leaflets/activities for children
- Website/Facebook/Twitter/Crowdfunding/Mobile Phone Giving/Digital Card Readers

Who will lead, preach and pray?



### ***Thank, Praise and Reflect?***

Give thanks to all involved and make notes here to say who will do what and when:

- Thank individual regular donors in person or by phone
- Announce overall results to all
- Thank volunteers
- Give thanks to God

What went well and can be re-used next year?

What needs some adjustment?

When will we next perform our financial health check? (suggest annually)

