



Parish Implementation Handbook

1st Edition (April 2021)

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To save confusion and paper only the nominated project leader and or Treasurer/Giving Officer needs to have a copy of this booklet.

The Parish Giving Scheme was created within the Diocese of Gloucester in 2009 and has since been endorsed by the Archbishop's Council. It has been part of a joint venture charity since December 2014; and it is a separate charitable limited company, wholly owned by diocese who have joined as members.

The Diocese of Leeds formally joined the Parish Giving Scheme on 1st January 2020

Throughout this guide and associated materials, **PGS** refers to the Parish Giving Scheme.

1. About this Handbook

This handbook is intended to provide a single reference document for local churches within the Diocese of Leeds, who are intending to implement the Parish Giving Scheme (PGS) locally. The handbook will be useful for:

- PCC Treasurers
- PCC Gift Aid Secretaries
- Clergy & Ministry Teams
 - Churchwardens
 - PCC Members

Copies of this handbook and other useful information, which will help you to promote and introduce the PGS within your Parish, are available for download on the Diocesan website at the Stewardship and Income Generation pages:

<https://www.leeds.anglican.org/pgs/3>

Related Documents

A selection of materials is available to support you and your PCC as you introduce PGS within your parish and to facilitate the on-going administration of the system.

- Materials intended for **PCC** use are available on the Diocesan website and from the Stewardship Team at

<https://www.leeds.anglican.org/pgs/3>

- An Introduction to the PGS – a PowerPoint presentation for PCC's
- Implementation Handbook
- Parish Action Checklist for PGS Registration & Implementation
- Parish Registration Form
- Frequently Asked Questions sheet
- PCC Resolution Record Form
- PGS Statement Example
- Dear Friends Letter

- Materials intended for **individual donors** are available directly from the Diocesan Office, once your PCC has registered with PGS: -
 - Donor Gift Form
 - A Better Way to Help Your Local Church -PGS explained (printed leaflet)

Please do not photocopy the donor resources. We do recommend you request printed material for distribution from Stewardship officers at Church House, Leeds. See page 15 for contact details

Introduction to the Parish Giving Scheme (PGS)?

Why are we adopting Parish Giving Scheme?

We were aware that our treasurers and Finance Teams wanted something that would help them with church finances. It needed to be easy to promote, free, would address static levels of giving and allow church members the opportunity to engage in thinking about their own level of financial generosity.

The Parish Giving Scheme (PGS) meets these requirements and is an opportunity for you to share with your church council and church members an exciting new and additional resource for planned giving.

What are the Benefits of the Scheme?

It is a tried and tested scheme that allows givers (donors) to donate to their church by regular Direct Debit payments. It is the only payment method with a money back guarantee and is therefore safer for the donor than Standing Orders, cheques and cash.

It has been found to be a simple method of giving, the gifts/donations are reliable and regular, and it helps churches plan for the future. Giving is reviewed annually with the givers (donors) and with the donor option for an inflationary increase, church income should increase year on year.

If envelope givers and open plate givers also join the scheme, giving levels have been found to remain steady, especially during times when people are on holiday or away from church.

As less money is handled in the church, it is safer for the volunteers and their time spent counting and banking the money is reduced. Bank charges may reduce as well.

As more and more givers (donors) switch to the PGS, it will save many hours of administrative time at local church level. Gifts/donations are much easier for the Treasurer (or Gift Aid Secretary) to reconcile than standing orders or cash. It will also improve cash flow, since Gift Aid is claimed and added each month by the PGS team.

You will be kept up to date with the amount of the payments and Gift Aid paid to the church with a monthly report (PGS Statement) showing names and amounts for each donation, except where the donor has chosen to remain anonymous. Annual statements allow you to quickly see the whole amount given, useful for annual thank you letters

The Diocese of Leeds is paying the one off set up cost to participate in the Parish Giving Scheme and the ongoing annual subscription. There are NO direct costs to a participating parish.

Giving that Makes a Difference

We want to encourage generosity, efficiency and regularity in giving; so that properly resourced the Kingdom of God will grow through the flourishing of the life of the local church; so donors know their money is being well used and so that PCC's can budget confidently.

The PGS offers an ideal opportunity to open up planned giving to people other than your Sunday congregation



Everyone Benefits

The Church

Stable and often increased giving

Gift Aid is automatically claimed improving cash flow

Protection against inflation if gifts increase annually by inflation rate

No charge to join, stationery is free

The volunteers

Reduced administration and paperwork

Time saved when counting less money

Time saved in Gift Aid claim

Time saved in account reconciliation

The church member

In total control of amount given

Simple giving method that means regular support to church

Option to increase gift annually by inflation

Option to give anonymously

Direct Debit guarantee

Tokens are available to represent giving on the open plate

How Does the Parish Giving Scheme Work?

Once a church or parish has officially registered for the PGS, there are three ways in which a donor (giver) can then set up a Direct Debit to donate regularly to their church or parish.

- via paper 'Gift Form' – available from your PGS parish representative
- via the PGS new telephone service
- via the PGS Digital Service

Planned Giving – The PGS Gift Form

The donor should complete the PGS Gift Form (*see example below*) and then post it directly to the PGS team in Gloucester. The donor should only cancel any previous method of giving to their church once they have been notified that their direct debit has been set up by the PGS team.

Completed Gift Forms should be posted to -

Parish Giving Scheme, 76 Kingsholm Rd, Gloucester GL1 3BD* (IMPORTANT - see page 12)

Being a Direct Debit scheme, **if the donor agrees** to the optional inflationary uplift it can be automatically applied each year. This has already been taken up by most donors in other dioceses and is a significant part of the Parish Giving Scheme.

1) Gift Form with the option to opt-in to the automatic inflationary increase

Any giver who chooses the inflationary increase can accept, cancel or increase further the annual increase, when they receive the annual review letter from the PGS. This will be sent on the anniversary of the start of their giving and 4-6 weeks before any increase is made so all givers remain in **complete control** of the amount they give.

PGS Gift Form example (above)

- 2) A donor can also choose to remain anonymous to their local church. This can be helpful in encouraging those who, for various reasons, feel more comfortable with their donations being kept anonymous, whilst still enabling the church to benefit from Gift Aid.

NOTE: please DO NOT photocopy the donor gift forms! The design has been approved by the PGS bankers and photocopied versions of these forms will not be accepted by the PGS office.

Planned Giving – The Dedicated Telephone Service

Donors may prefer the option of setting up their Direct Debit by using the dedicated PGS telephone service.

To do this donors should call:

0333 002 1271

Lines are open Monday to Friday, 9 – 5pm.

One of the PGS administrators will take the donor through the sign up process – this normally takes around 15 minutes. The donor will need to have the following information to hand:

- Personal bank account details
- The name of the parish they wish to donate to
- They will need to confirm if they want to increase their gift in line with inflation each year
- Confirm if they are eligible for Gift Aid
- **The PGS code for their parish (usually 9 digits in length) ***

****Note: This is the one piece of information that the donor will not have. Please ensure that your church/parish PGS representative has given the PGS code to the donor in advance of them telephoning the PGS, to guarantee the gift goes to the correct parish.***

Planned Giving – The Digital Service

The PGS launched its new Digital Service on 1st March 2021 allowing donors to set up their regular giving easily online for their parish or church directly through the Parish Giving Scheme website at www.parishgivingscheme.org.uk/home

Once a church/parish has registered for the PGS, their PGS Statement Receiver will have access to information and Digital Service resources once they log in to their PGS Statement Receiver account on the PGS website. The PGS

Statement Receiver should initially look at developing their “Parish Landing Page” to help promote the PGS to their congregations. It is possible to edit the Parish Landing Page directly via the PGS website and also through the church/parish’s A Church Near You page. To find out more about the PGS Digital Service and to download instructions on how to edit the Parish Landing Page visit <https://www.leeds.anglican.org/pgs/digital-service>

What does your church need to do?

Be Realistic

The PGS will not solve all financial problems that a local church might have. However, it does offer an important opportunity to engage people in thinking about their own levels of financial generosity to their church.

It is strongly recommended that you run a giving renewal programme, and take advantage of the opportunity to encourage giving, as well as introducing the PGS as your church’s preferred method of giving. PGS is an excellent tool to help your church to process incoming giving and administer Gift Aid, but it is not of itself a motivational tool to elicit higher levels of giving.

Despite the realistic perspective above, parishes in other dioceses have found that a discussion about the PGS can act as a very effective prompt to people to think about their level of giving, and to then review it.

Pray

We need to seek God’s guidance before you make any significant decision affecting our church.

Pass a PCC resolution

Joining the PGS will mean that money from participating donors will flow to the PCC through the PGS, rather than directly from the donor to the church, as with other methods. It is important therefore that the trustees of the local church (the PCC) pass and minute a resolution. It can be as simple as:

“We the PCC of ... agree to join the Parish Giving Scheme and to agree to receive donations from the scheme in favour of this parish”

Aide-memoire: Write here the date the resolution was passed	
<i>A useful PCC resolution template is available for download if required</i>	For download please visit https://www.leeds.anglican.org/pgs/3
<i>A PowerPoint presentation is also available to download, if required, to allow you to present the information and benefits about the Parish Giving Scheme to the PCC.</i>	For download please visit https://www.leeds.anglican.org/pgs/3

Register your church

Use the **PGS Registration Form** (this can be photocopied if you wish) to register your church. The first page of the form collects data about church officers and beneficiary bank account details. The second page asks for some statistics about your current patterns of giving, to give a base from which to measure the effectiveness of PGS. It also provides donor numbers from which we can estimate the quantity of resources you might need for local use.

Please complete both pages of the form.

<i>Copies of the PGS Registration Form are available for download from the Diocesan website or can be sent to you upon request</i>	For download please visit https://www.leeds.anglican.org/pgs/3
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Aide-memoire: Write here the date the Registration Form was sent to the Diocesan office.	
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- If completing the form by hand, please use BLOCK CAPITALS to ensure all details are legible (especially bank details) Please ensure that this form is signed by PCC representatives before returning it to the Diocesan office.
- **Please include a copy of a paying in slip for the parish bank account matching the details on the registration form. This is for verification purposes.**

The process works at its most efficient when no queries need to be raised about completed forms either by the Diocesan Office or members of the PGS Team. Please complete forms as clearly and accurately as possible.
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Page 1 of the Registration Form

Please ensure that all sections of the first page are completed except for the PGS Code; this code will be allocated by the Diocesan Office and provided to the parish later.

Please note that when supplying details of the project leader and the statement receiver on the form, it is NOT enough merely to state their position e.g. Treasurer. The PGS systems require **name and contact details**.

In the event of further queries, diocesan representatives will contact the individual (s) named as the PGS Project Leader and Statement Receiver to discuss any aspects of the implementation of the Scheme in your Parish
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The church name used to register your parish is important; this is the church name that will appear on donor resources and communications from the PGS team. To ensure donors have confidence in the scheme, we want to make sure that the parish and church name reflects the local reality. Should your church be known locally as something different, then please inform the Diocesan office at the point of Registration so the appropriate parish name is allocated. (Please note that parish names should not exceed 30 characters).

Once all the parish details are complete, the form needs to be signed by the relevant church officers and dated. If the parish is in vacancy, two churchwardens may sign in place of the incumbent.

Page 2 of the Registration Form – Stewardship information & statistics

This section of the form is important and will be of value in measuring the success of PGS in your parish and within the wider Diocese. The information also provides the detail needed for us to determine the quantity of resources required by a parish on registration.

Please consider whether the PGS offertory tokens will be required within your parish (use is not obligatory). Please indicate on the form if you will be using these tokens and how many you require.

If you would like more information about giving renewal programmes within your church, please see page 13 of this handbook or contact the Stewardship Officers at the Diocesan Office.

Submit your completed Registration Form PGS2

The completed and signed Registration Form should be sent to:

PGS, Janet Edmond (Stewardship Officer), Church House, 17-19 York Place, Leeds, LS1 2EX

If you prefer, a scanned copy of the signed form can be emailed to janet.edmond@leeds.anglican.org

What happens after submitting your PGS Registration Form?

PGS operations within the Diocese of Leeds are handled primarily by **Janet Edmond (Stewardship officer)** so emailing janet.edmond@leeds.anglican.org will ensure that all registrations, resource orders etc. are processed as quickly as possible.

On receipt of your Church Registration Form: -

- Receipt of the Parish Registration Form will be acknowledged to you and any queries dealt with. Communication will typically be with the parish PGS Project Leader and Statement Receiver.
- We send all information to the PGS team to enable your parish to be registered and set up with the scheme.
- The PGS team will process the application. Your Statement Receiver will receive a Welcome email from the PGS confirming PGS registration and outlining important parish details. Please check all details thoroughly before donors begin to register with PGS.
- A Stewardship officer from the Diocese of Leeds will contact you to discuss how you are going to promote the Parish Giving Scheme to your church members and what Gift Forms are required.
- Parish resource packs are prepared at the Diocesan office. The size of the packs (which will include a stock of PGS Gift Forms, free PGS tokens (if required) and explanatory literature) will be based on the number of regular givers detailed on page 2 of your registration form. The Gift Forms will be personalised with your church's PGS reference number. Additional resources can be made available on request.
- The resource packs will normally be posted (2nd class) to the PGS Project Leader of the registered parish for distribution.
- Stewardship officers at the Diocese of Leeds are available to parishes for support in implementing the PGS as the need arises.

You may find that you need a small team to help you run a stewardship programme (if applicable) and to ask the congregation individually to join the PGS scheme. Either you or someone else will need to be 'project leader' who can co-ordinate all the necessary activities, how and when to contact each member of your church and provide them with a welcome letter (if required), church member leaflet and a Gift Form

You may find it helpful for council members to join the scheme first, so a couple of local people are able to share how easy it was to do. It is easy for Standing Order givers to move across, and most should be willing to do so. Although more of a change for envelope givers, once they understand the benefits to them and the church. It should not be a problem for them to join.

Implementing the Parish Giving Scheme Locally

Giving Renewal Programme

It is strongly recommended, but not essential, that you run some form of Stewardship programme or Generosity project when you launch the PGS locally. This has two benefits: firstly, to take advantage of the opportunity to discuss giving and secondly, to introduce the Parish Giving Scheme as a preferred method of payment.

The PGS is certainly a good mechanical tool to help your church to process incoming donations and administer Gift Aid, but it is not in itself a motivational tool to elicit more giving.

Resources to help guide you in the process of choosing the most appropriate giving renewal programme for your parish can be seen on page 13 of this handbook and by contacting the Stewardship team at the Diocesan office.

Collating Resources

On receipt of your PGS pack from the Diocesan office, you will need to prepare the resources ready for local distribution and plan the distribution to fit with any local giving renewal programme that you are planning.

Parish Giving Scheme Resources Pack

Your PGS Resources pack will contain gift forms, PGS information leaflets for givers (A5) and pre-printed labels particular to your parish. If you have opted to use the offertory tokens, these will also be provided.

The gift forms are A3 size folded into an A5 format. They explain the scheme in some detail. Before you issue a form to a prospective donor, **please stick one of the pre-printed labels onto the form as shown:**

YES | I wish to give a regular donation for my church

I wish my donation to be used solely for the benefit of:

Church/Parish name:	Dibley
PGS Parish Code:	46-999999999
In the Diocese of	LEEDS

Stick the label here

The Gift Form, suitably labelled as above, and PGS information leaflets can be given to anybody who:

- Has expressed an interest in planned giving, or
- Is willing to “convert” to the PGS from their existing method of regular giving.

Distribution

Forms and any PGS literature, together with an appropriate covering letter (written locally) should be addressed personally and sent or handed to donors directly.

Simply leaving piles of donor forms and booklets at the back of the Church is unlikely to lead to a good take up of the PGS; however having some available for people just to pick up may help those who want to give anonymously. Having to ask for a Gift Form may deter those who want to remain anonymous so be mindful of the need for a variety of approaches.

If your parish has opted to use giving tokens these should be available for donors to collect at each service rather than individuals having to remember to bring their token with them every time. You could leave a quantity of them in a basket or plate near the door through which people normally enter your church building for worship.

Some Useful hints and tips

- Experience so far has shown that, if you ask council members to adopt the PGS first, then others will follow in due course
- Best to hand deliver the information to the congregation rather than leaving at the back of the church.
- If you can also issue a stamped addressed envelope; Parish Giving Scheme, 76 Kingsholm Road, Gloucester, GL1 3BD with every donor form you distribute you will reduce confusion as to where the forms should be sent and also **increase the response rate.**
- Please do not photocopy the actual donor forms: their design has been agreed with the PGS bankers and photocopies will not be accepted by the PGS office.
- PGS donor forms need to be in the hands of the PGS administration centre in Gloucester at least one full month before the donor wishes their first gift is due to be collected. This is to allow time for processing the form and setting up the direct debit. We also advise you not to collect forms in centrally in the parish and send them off together as this can create delays.
- **Donors will need to be reminded to CANCEL existing Standing Orders to the local church. Ideally, donors will keep existing Standing Orders going until the month before their first Direct Debit collection date.**

Gift Aid Small Donations Scheme (GASDS)

You can still claim Gift Aid through the Small Donations Scheme (**GASDS**) even though you are registered for the PGS. To retain qualification for the maximum GASDS claim on £8,000 cash donations annually you need to still make a regular Gift Aid claim on donations totalling £800 per year **that are not** gifted through the PGS, i.e. Standing order of £66.67 minimum per month or weekly envelope(s) of £15.38 minimum. By doing this you will retain your own Gift Aid number and eligibility to claim through GASDS.

This should not be an issue for most churches as it is unlikely that all donors will be using the PGS and there will still be one-off gifts from special services etc., nevertheless it is something to bear in mind. Please contact the Stewardship team if you would like further advice on GASDS and the PGS.

Choosing an appropriate Stewardship Programme

In launching the PGS there is clearly a great opportunity for parishes to engage in some form of giving initiative at the same time. Experience reveals a much stronger take up of the PGS when it is offered as a vehicle for giving on the back of a Stewardship Programme or Giving Review. This stronger take up is both in terms of donor numbers and giving levels.

If you have recently engaged in a Stewardship Programme (within the last two years), you may prefer to simply offer the PGS, on the back of some form of annual review of giving.

More importantly, this provides an ideal occasion to encourage your parishioners in their Christian giving. As with any well- designed Stewardship Programme, it is another way of declaring vision and demonstrating how generosity enables the funding of Christ's mission and ministry. It is crucial to use this to link generosity with the mission and ministry that flows from it.

There are many types of Stewardship Programmes that a church can choose from.

Giving in Grace <http://www.givinginGrace.org/index.html>

Giving for Life <http://www.gloucester.anglican.org/finance/trusts/giving/>

Parish Funding Programme - <http://www.parishresources.org.uk/giving/pfp.htm>

Harvest Generosity Week Resources - <https://www.parishresources.org.uk/generosity-week-harvest/>

Generosity Week Resources - <https://www.parishresources.org.uk/generosity-week/>

Action Checklist for PGS Registration & Implementation

	Completed y/n	Actioned by	Comments
PREPARATION			
Nominate project leader			
Attend launch/training event run by Diocese – get this handbook, leaflet, FAQ sheet,			
Pass resolution at PCC			
Registration form completed, sent to Church House, Leeds			
Assemble team to help			
Email from diocese that registration form has been received and “Dear friend” letter			
PGS Gift Forms, and tokens, received from diocese			
IMPLEMENTATION			
Customise Dear friend letter			
Keep a record of responses on spread sheet			
Recruit church council onto scheme – use PGS gift form, PGS presentation and implementation document			
Make a list of people who already do ‘planned giving’ to move them to use PGS, PGS Gift Form and ‘Dear friends’ letter and PGS information leaflet			
Make a list of people who do not currently do ‘planned giving’ to ‘recruit’ them into PGS with a PGS Gift Form and ‘Dear friends’ letter and PGS information leaflet			
See if any other people wish to join e.g. friends			

Contact details

Below are details about who to contact regarding different aspects of the PGS:

Not Yet Registered

If you are interested in registering or have any other questions, please call the Stewardship Officers at the Diocese of Leeds:

Janet Edmond

Tel: 0113 353 0214 (office), 07376 525 684 (mob.)

Email: janet.edmond@leeds.anglican.org

Or

Becky Nicholson,

Tel: 0113 353 0214 (office), 07496 265 509 (mob.)

Email: becky.nicholson@leeds.anglican.org

You can also visit the Parish Giving Scheme pages on the Diocesan website for more information and to download forms etc. at

<https://www.leeds.anglican.org/pgs>

Already registered

If your church is already registered with PGS and: -

1. You would like more resources, advice about giving and stewardship or support to increase the take up of PGS in your parish then please contact the **Stewardship officers** (details as above)
2. You would like to change key personnel such as the Treasurer, Statement Receiver or Project leader or update their contact details then please contact the **Stewardship officers** (details above)
3. You have queries relating to donors, donations and parish statements then please contact:

Parish Giving Scheme Officer

Parish Giving Scheme, 76 Kingsholm Road, Gloucester, GL1 3BD

Tel: 0333 002 1260

Email: info@parishgiving.org.uk

4. You want to know where to refer existing PGS donors to discuss their individual giving through the PGS then please direct them to the PGS team's address:

Parish Giving Scheme Officer

Parish Giving Scheme, 76 Kingsholm Road, Gloucester, GL1 3BD

Tel: 0333 002 1260

Email: info@parishgiving.org.uk

Acknowledgements

Thanks go to the team at the Parish Giving Scheme Ltd and to National Church Officers for their support and guidance. Thank you also to the Stewardship Advisers in the Dioceses of Liverpool, Hereford and Coventry for their generosity in sharing their knowledge, expertise and example resources.

A massive thank you also is extended to the parishes in the Diocese of Leeds who have participated in the PGS pilot phase from August to December 2019 prior to the wider launch of the PGS in January 2020. Their helpful feedback has been extremely valuable in preparing for the wider use of the PGS across the Diocese.



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- The logo is only used in articles or documents relating directly to the PGS
- No changes are made to the logo, other than resizing (but please preserve the aspect ratio)

If you wish to use the logo, please seek permission from Parish Giving Scheme Ltd info@parishgiving.org.uk stating that you agree to the conditions stated above.