



THE CATHOLIC DIOCESE OF
ARUNDEL & BRIGHTON

FINANCE FORUM 2021

www.abdiocese.org.uk



THE CATHOLIC DIOCESE OF
ARUNDEL & BRIGHTON

WELCOME

Bishop Richard will open our forum and lead us in prayer

OPENING PRAYER



Lord, the Word who is Life.
May all the people of our Diocese
grow in openness
to the power of the Holy Spirit,
so that through a growth
in understanding and courage,
and truly open to your call,
we may bear powerful witness
to all around us,
for you are Lord for ever and ever.
Amen

AGENDA

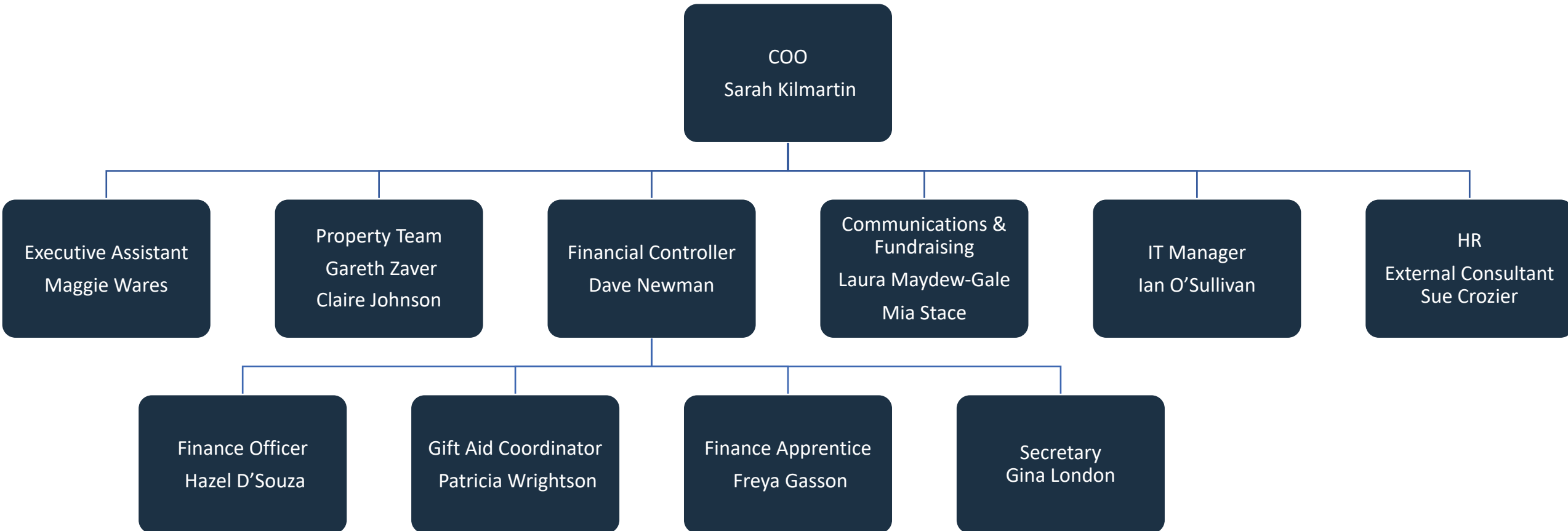


- Introduction and Investments – Sarah Kilmartin
- Accounting updates – Dave Newman
- Parish fundraising – Mia Stace
- Outlook for Central finances – Sarah
- Volunteer emails update – Sarah
- Q&A



SARAH KILMARTIN INTRODUCTION AND INVESTMENTS

FINANCE, PROPERTY, HR, IT & COMMS



2021 UPDATES



- Mass attendance is recovering and offertory to the end of August was 10% ahead of last year
- Fundraising Officer restarting Planned Giving Drives
- Roll out of IT provision to parishes
 - 365 and One Drive will help prevent cyber crime
- Health and Safety compliance improving again
 - Fire Safety is a key focus
- New payroll provider
- Reviewing costs and consolidating central offices

AUDIT NEWS



- Clean audit and continued improvements noted
- Areas identified for further improvement:
 - Regular meetings of Finance Committee
 - Look at the financial detail
 - Retain minutes
 - Update financial planning annually with a parish budget
 - Can be as simple as agreeing how the coming year's income and expenditure may differ from the last one.
 - Count cash in pairs, with both people signing the cash sheet.
 - Stay on top of quinquennial surveys
- New auditors appointed Moore Kingston Smith take over from haysmacintyre

GASDS



- Gift Aid Small Donation Scheme – the claim is made annually using AIQ records to identify eligible amounts
- Each parish can claim up to £2,000 per church on cash collections of up to £8,000
- Loose plate is only eligible if banked intact – be very careful if any cash is retained for housekeeping
- GASDS will be claimed on amounts coded to:
 - 10020 Offertory Cash GASDS
 - 10040 Christmas and Easter Offertory Cash GASDS
 - 10060 Second Collections Cash GASDS
- You MUST only use these codes for eligible donations <£30 fully reconciled to counting sheets and banked in full
- Finance team can help with journals to correct postings if the above codes have been used for other donations
- GASDS can be claimed on contactless payments – our Gift Aid co-ordinator and Finance team will support with this

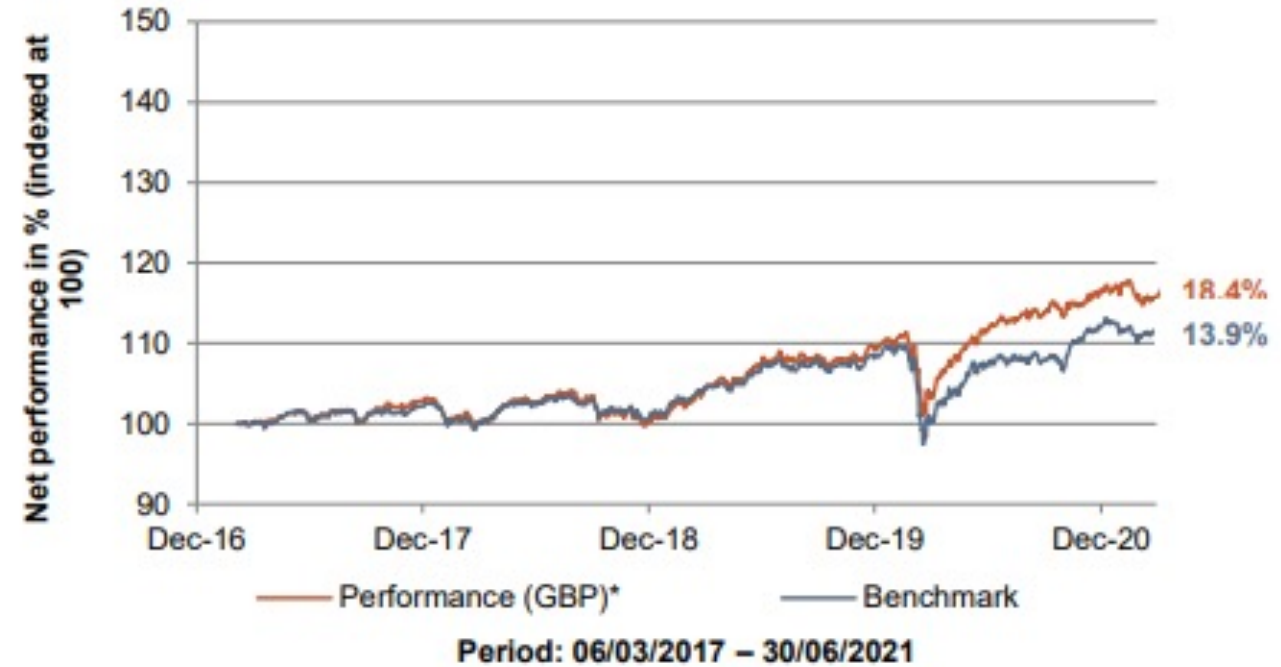
A GASDS Handbook is now available

PARISH INVESTMENTS

MAIF 1 Performance (since inception) Oct 2021 value £31.6m



MAIF 2 Performance (since inception) Oct 2021 value £1.2m



- Berenberg has been managing Central and Parish investments since 2017
- Parishes own 25% of MAIF 1 and 100% of MAIF 2
- The aims of the different portfolios are set out in the Statement of Investment Principles
- The key difference is the level of risk – MAIF 2 has a greater focus on preservation of capital

ALL PORTFOLIO INVESTMENT INCOME

	2016	2017	2018	2019	2020
Year end value of assets	£28.3M	£30.3M	£28.4M	£33.0M	£36.9M
Dividends received	£800K	£789K	£589K	£771K	£495K
Percentage yield	2.8%	2.6%	2.1%	2.3%	1.3%

- The growth in investment value has been well ahead of target
- The capital gains have not been realised, but have been retained in the portfolio
- The dividend yield has been dropping in our portfolios and in the wider market
- To help with cashflow we will now increase our annual cash receipt to 3% of portfolio for MAIF 1
- This receipt will be funded by dividends and by crystallising a proportion of the capital growth
- Parishes can ***opt out*** of receiving dividends and can choose to reinvest their gains
- No change proposed to MAIF 2 dividends will be received as normal and can be reinvested

A background image showing a workspace. A laptop is open, displaying a spreadsheet with various colored cells. In front of the laptop is a spiral-bound notebook with a green cover. A blue pen lies on the wooden desk surface in the foreground.

ACCOUNTING UPDATE WITH DAVE NEWMAN

PARISH RESTRICTED FUNDS

RESTRICTED FUNDS

- AIQ doesn't automatically account for restricted funds
- Need a manual routine to transfer restricted fund movements onto the balance sheet
 - Run report to see restricted income and expenditure during the year by fund
 - Journal required to update the restricted funds in the balance sheet (90XXX codes) with this net movement
 - Check the balance sheet restricted funds to make sure none are over-expended
 - Journal required to correct over expenditure of restricted funds by transferring this to the general fund
- The instructions on how to do this are on the Diocese web site under Finance – Parish Accounting Handbook – Year End Review of Parish Restricted Reserves
- This is an essential part of finalising the year end for the Parish and we will walk through it now

RUNNING THE RESTRICTED FUNDS REPORT

REPORTS | SETUP | SALES | PURCHASES | ITEMS | BANK | GENERAL | ANALYSIS | EMAILING

Dashboards

Bank

Sales

Purchases

Items

GENERAL LEDGER ACCOUNTS | GL JOURNAL MANAGER | COST ACCRUALS M

General Ledger Accounts

NEW GL ACCOUNT | GL EXPLORER | DOWNLOAD BUDGET TEMPLATE | UPLO

Balances at 17 Dec 2019 11:13. Click the Refresh Grid link above to up

Category	Sub Category
Donations and legacies	Donations and legacies
Donations and legacies	Donations and legacies
Donations and legacies	Donations and legacies
Donations and legacies	Donations and legacies
Donations and legacies	Donations and legacies

Chart of Accounts

GL Account Listing

Add/Edit GL Accounts

Balance & Transaction Enquiry

Transaction Browser

GL Explorer

Budget Maintenance

Download Budget Template

Upload Budget Template

Budget Review & Maintenance

GL Journals

Journal Entry

Deferred Revenue

GL Journal Manager

GL Revenue Accrual

GL Cost Accrual

GL Prepayments

GL Import Journals

Foreign Exchange Revaluation Journal

GL Cost Accrual Manager

System Reports

GL Reports



VAT Reporting

VAT Management

EXTENDED BUSINESS ANALYSIS DIMENSION REPORT

Report Manager - Microsoft Edge

https://hostacct.com/system/dashboard/reports/selectreport.aspx?rptgrp=GL%20Reports&ledgrpid=1&usrid=SKilmartin&basecur=£GBP&logon=l6863847429&pa

Report Manager  Support  Help


Report Groups

Search

- Cash and Bank Reports
- Custom GL Reports
- Extended Business Analysis**
- GL Reports
- Mgt. Report Packs
- Purchase Reports
- Sales Analysis

Reports

- Analysis Structure Mapping
- Extended Business Analysis – Dimension Comparative Reporting**
- Extended Business Analysis – Reporting By BI Code/Dimension



CHOOSE THE FILTERS AND VIEW

Financial Year:

2021

From Period:

January

To Period:

December

Budget Type

None

Dimension

Parishes

Element

5026

Dimension

SORP

Element

All

Dimension

Departments & Locations

Element

All

GL Category(ies)

01;02;03;04;05;06;07;08;09;10

Expand Options:

glcat

Show Header (Choose
No if exporting to Excel):

Yes

View

Print

Email

GL CATEGORIES: UNTICK BALANCE SHEET ITEMS

Filter Data By:
Please select desired values for the filters and click one of the report action buttons at the bottom of the page.

Financial Year:	<input type="text" value="2021"/>	From Period:	<input type="text" value="January"/>
To Period:	<input type="text" value="Type a value to filter data."/>		
Dimension	<input type="checkbox"/> Tangible Fixed Assets		<input type="text" value=""/>
Dimension	<input type="checkbox"/> Financial Assets		<input type="text" value=""/>
Dimension	<input type="checkbox"/> Current Assets		<input type="text" value=""/>
Dimension	<input type="checkbox"/> Creditors: Amounts Falling Due Within One Year		<input type="text" value=""/>
Dimension	<input type="checkbox"/> Debtors: Amounts Falling Due Within One Year		<input type="text" value=""/>
	<input type="button" value="Clear All"/>	<input type="button" value="Select All"/>	<input type="button" value="Ok"/> <input type="button" value="Close"/>
GL Category(ies)	<input type="text" value="01;02;03;04;05;06;07;08;09;10"/>	Expand Options:	<input type="text" value="glcat"/>
Show Header (Choose No if exporting to Excel):	<input type="text" value="Yes"/>		

The bottom 5 GL Categories should be unticked so the report only shows income & expenditure

EXAMPLE REPORT

further analysed by Departments & Locations

GL Category	GL Sub Category	GL A/C	RES				UNRES	
			CLERGY	FLOW	PROJ2	zz - NoCode		
			Amt	Amt	Amt	Amt	Amt	Amt
Donations and legacies			(30,666)	(1,088)	(582)		(32,337)	(528,800)
Charitable activities							(33,795)	(33,795)
Other trading activities							(150,306)	(150,306)
Investments							(1,023)	(1,023)
Other							(5,467)	(5,467)
Raising funds							19,707	19,707
Charitable activities			36,828	654	582		396,235	434,299
Other Expenditure							121,432	121,432
Transfers							124,408	124,408
Total:			6,161	(454)			19,381	(38,925)
								(19,544)

The Clergy Fund shows a positive result at year end because there was more expenditure than income. The net expenditure will be set against brought forward restricted reserves, or the general fund

The Flower Fund is negative. This means there was more income than expenditure. The excess needs to be carried forward on the balance sheet as a restricted fund to be use in future years.

Journals are needed to ensure that the parish reserves correctly reflect the effect of the year's activities

RESOLVING THE CLERGY FUND £6,161 OVERSPENT

- **To move items between reserves expense accounts in the 300XX series are needed:**

- 30030 Transfer from unrestricted
- 30050 Transfer to restricted
- 30070 Transfer from restricted

- **Restricted fund accounts are in the range 90100 to 90300 e.g.**

- 90190 Parish restricted fund - clergy
- 90200 Parish restricted fund - maintenance
- 90210 Parish restricted fund – flowers

When a parish holds funds these are always shown with a negative balance – funds are reduced by posting a debit and increased by posting a credit

- *To correct the restricted clergy fund in the example above you will post*

- A debit to 90190 Restricted clergy fund – this will reduce the brought forward clergy fund - £6,161
- A credit to 30070 Transfer from restricted fund using BI code Clergy - £6,161

FLOWER FUND SURPLUS

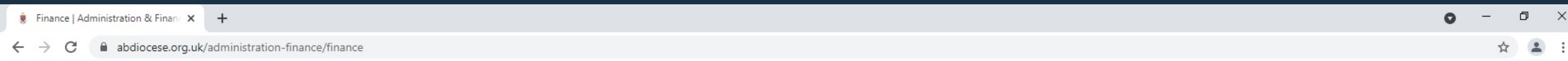


Resolving the Flower Fund Surplus £454

- In the example parish the flower collection amounted to more than was spent on flowers in the year
- The surplus restricted collection will be added to any brought forward restricted flower fund so that it can be used in future for the intended purposes of providing flowers in the church
- The journal required will be to:
 - Debit 30050 Transfer to restricted £454 BI code Flowers
 - Credit 90210 Parish restricted fund – flowers £454

Instructions for posting a journal can be found on the finance website pages www.abdiocese.org.uk or the Finance Team can talk you through it or do the posting for you

INSTRUCTIONS FOR POSTING A JOURNAL



THE CATHOLIC DIOCESE OF
ARUNDEL & BRIGHTON

[DIOCESE](#)

[FAITH](#)

[DEPARTMENTS](#)

[NEWS](#)



ADMINISTRATION & FINANCE

Finance

Fundraising
& Gift Aid

Property
& Insurance

Health & Safety

HR & Payroll

Policies

Clergy

IT Department

PARISH FINANCE COMMITTEE HANDBOOK



DONATE

PARISH ACCOUNTING HANDBOOK



AccountsIQ

All diocesan parishes now process their accounts using AccountsIQ software. This is a cloudbased system and is standard across the whole Diocese, greatly aiding consolidation and the ability of the Finance team to support parishes remotely.

The Handbook information below will guide you through all aspects of using the system. Please [email](#) our Finance Office if you have any questions.

Download Guidance

[Year End Review of Parish Restricted Reserves](#)

[Using a Journal to Accrue Costs](#)

[Posting a General Journal](#)

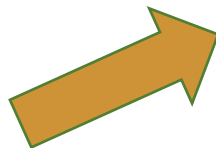
[Booking in Payment to the Diocese](#)

[Bank Reconciliation](#)

[Recording Expenses](#)

[Recording Income](#)

[Introduction](#)



CHECKS AFTER POSTING THE JOURNAL

After posting the journal:

- **Re-run the Extended Business Analysis report and check the fund activity now nets to zero**
 - The report should now show restricted fund activities resulting in zero, as the in-year surpluses and deficits have been transferred to the general or restricted funds.
- **Check the balance sheet for negative Restricted Funds**
 - Restricted funds go negative when the costs transferred to them exceed the brought forward reserve
 - This is a real possibility in 2021 as the Bishop stipulated minimum clergy withdrawals at Christmas and Easter

CORRECTING NEGATIVE RESTRICTED RESERVES

When a parish holds restricted funds these are always shown with a negative balance on the 90100 to 90300 accounts

When one of these accounts is showing a positive number, a journal is needed to increase the restricted reserve to zero.

In the previous example, we posted £6,161 of net costs to the restricted clergy fund.

If we only had £3,000 brought forward in the fund, we would now have a clergy fund showing a positive year-end balance of £3,161. This represents an excess cost that must be resolved using the general fund. The journal needed is:

- Debit 30050 Transfer to restricted £3,161 Bl code General
 - Credit 90190 Parish restricted fund – clergy £3,161
-
- The balance sheet will now reflect correct Restricted Funds. The transfer of general funds will happen when the year end process is run by the Diocese after the auditors have signed off the accounts.

A person's hands, wearing a dark, textured sweater, are shown holding a large pile of coins. The coins are stacked and fanned out, filling the palms. The background is a soft, out-of-focus light blue. Overlaid on the center of the image is the text "DEALING WITH CHARITY COLLECTIONS & PAYMENTS" in a white, serif font.

DEALING WITH CHARITY COLLECTIONS & PAYMENTS

THIRD PARTY CHARITY COLLECTIONS

- The funds collected on behalf of other charities is not income for the parish, as it is money that is due to be paid over to the respective charity
- The monies are entered into AIQ via the cash collection system, using the 3rd Party Diocese and 3rd Party Parish sections of the system
- AIQ treats this income as a creditor for the balance sheet
- Details of money collected, and amounts owed to charities can be seen under the Purchases tab. Details of collections can be seen by drilling down into the balance figures
- Payments to charities need to be recorded as purchases payments and allocated against the collection they are paying over.
- This process is explained in the Finance section of the diocesan website and we will walk through it today.

POSTING PAYMENTS TO THIRD PARTY CHARITIES

1. Go to Purchases Tab to get started
2. To view what is owed click on Suppliers The screen will then show the list of suppliers and what is owed. Diocese is the first.

By Clicking on the Balance shown one will be able to see amounts due to the Diocese.

REPORTS	SETUP	SALES	PURCHASES	ITEMS	BANK	GENERAL	ANALYSIS	EMAILING	MY NOTICES
Dashboards	Bank	Sales	Purchases	Items	General				
SUPPLIERS	ITEM INVOICES	BATCH INVOICES	BATCH PAYMENTS						
Suppliers - Active Suppliers									
NEW SUPPLIER									
EXPORT TO EXCEL REFRESH GRID ADVANCED FILTER ADD/REMOVE COLUMNS									
CURRENT FILTER: Active Suppliers CLEAR									
Code	Name	Address 1	Telephone	Currency Code	Balance	Attach	Notes	Actions	
DIO	Diocese			GBP	-1,883.23			Actions	
YCAFOD	Parish Fundraising CAFOD			GBP	0.60			Actions	
YUKECU	Ecumenism / UK Missions			GBP	0.00			Actions	
YUKEDU	Schools / Preschools			GBP	0.00			Actions	
YUKPOOR	UK Poor, Homeless, Migrant			GBP	0.00			Actions	
YUKSICK	UK Sick / Hospice			GBP	-1.00			Actions	
YWMISS	Overseas Missions / Education			GBP	-370.00			Actions	
YWPOOR	Overseas Sick/Poor			GBP	-419.00			Actions	

ACCOUNTS IQ

3. To start the payment process click on 'Actions' on the right hand side of the Balance
4. Select 'Create Purchase Payment and Allocate'

DashboardsBankSalesPurchasesItemsGeneral

SUPPLIERS | ITEM INVOICES | BATCH INVOICES | BATCH PAYMENTS

Suppliers - Active Suppliers

EXPORT TO EXCEL | REFRESH GRID | ADVANCED FILTER | ADD/REMOVE COLUMN

CURRENT FILTER: Active Suppliers CLEAR

NEW SUPPLIER

Code	Name	Address 1	Telephone	Currency Code	Balance	Attach	Notes	Actions
DIO	Diocese			GBP	-1,883.23			Actions ▾
YCAFOD	Parish Fundraising CAFOD			GBP	0.60			Print ▶
YUKECU	Ecumenism / UK Missions			GBP	0.00			View ▶
YUKEDU	Schools / Preschools			GBP	0.00			Email ▶
YUKPOOR	UK Poor, Homeless, Migrant			GBP	0.00			Create Batch Invoice
YUKSICK	UK Sick / Hospice			GBP	-1.00			Create Batch Debit Note
YWMISS	Overseas Missions / Education			GBP	-370.00			Create Product Invoice
YWPOR	Overseas Sick/Poor			GBP	-419.00			Create Product Debit Note
								Create Purchase Payment and Allocate

ACCOUNTS

5. Add the payment date, cheque number and fill in the Allocate column with the amount being paid against the collection monies
6. Click on the green process button to post the payment. The posting is now created and can be matched in the bank reconciliation

Purchase Payments & Allocations Getting Started Support Help

Supplier: (GBP) Bank: (GBP)

Payment Da... Bank Ref/Cheq...

Payment Amt: (GBP) Amount Withd...

Bank Charges: (GBP) BI Code:

Description:

Disp.	Due	Type	Int Ref	Ext Ref	Transaction Date	Description	Due Date	Total	Allocated	Outstanding	Allocate	Disc. Amt
A	A											
	Yes	PI	000019	MC 1-2019-06-30-CTP	30 Jun 2019	DIO - Peter's Pence-	30 Jul 2019	99.45	0.00	99.45	99.45	0.00
	No	PI	000023	Q3 Levy Recharge:30/09/2019	30 Sep 2019	DIO - Qtr 3 Diocese Levy	30 Oct 2019	1783.78	0.00	1783.78	1783.78	0.00

Page of 1 (2 items) records per page

[Create Filter](#)

Grid Options...

Show Me

Balance after payment : 0 (GBP) Un... :

[View last processed payment](#)

If you do not recognise the transactions or were not expecting them do not process them – contact Bishop’s House in Hove and we will resolve your query.

A hand is shown holding a stack of credit cards. The top card is a white Apple Pay card with the Apple logo and a contactless payment symbol. Below it is a blue American Express card, and further back is a dark blue Capital One card. The text 'CONTACTLESS PAYMENTS' is overlaid in a white, serif font across the center of the image.

CONTACTLESS PAYMENTS

ACCOUNTING CORRECTLY FOR CONTACTLESS

- Monies received from SumUp and Dona come direct into the parish bank account.
- These receipts are net of charges but should be recorded gross, with the card charges being shown as an expense.
- The only way to post this currently is to post the gross income as a receipt and the card charges as a payment and manually match these in the bank reconciliation.
- If parishioners also pay in money this way for collections then the gross amount needs recording through cash collections, against the respective charity and again the card charges being recorded as bank payments and both items being manually matched in the reconciliation.
- From 2022 the cash collection system will allow input of SumUp/Dona statements so that charges can be recorded and the correct gross offertory is accounted for.

A woman with dark hair in a bun is pointing at a laptop screen. A man with glasses and a beard is looking at the screen. They are in an office environment with other desks and people in the background. The image has a blue tint.

BANKING & BACS

UPDATE ON PARISH RECHARGES

- A serious issue with HSBC has been overcome and we can now transact BACS files through the electronic systems once again.
- This has enabled us to process Diocese charges and distributions for the last few months and clear the backlog.
- The entries have all been processed and have been debited and credited to your parish bank accounts on Friday 29 October.
- The AIQ entries have already been made for the costs and income and the entries for payments and receipts will now be processed as well. These should then match when the bank statements for October are uploaded, so no one should have to make any entries for these transactions.
- Salaries, Gift Aid, Dividends and Interest transactions all now up to date – if you are unsure about any of the transactions contact the Finance team



THE CATHOLIC DIOCESE OF
ARUNDEL & BRIGHTON

PARISH FUNDRAISING

www.abdiocese.org.uk

WAYS WE CAN HELP PARISHES



- **Planned Giving Drives**
- **Bid writing for small grants for projects**
- **Promoting Gift Aid & Standing Orders**
- **Contactless Giving**
- **Online Giving**
- **Cashless payments**

STANDING ORDER IS THE BEST WAY GIVE



- No last-minute scramble for cash before Mass
- Accurate, safe, and secure
- Guaranteed to happen
- Easily Gift Aided
- Lower costs and lower risks
- The parish still receives donation if the donor is unable attend Mass in church
- Allows the parish to budget effectively
- Saves the parish time and money

Promote standing order!

- Publish your parish bank details
- Add standing order forms and instructions to your website and newsletter
- Display posters in the church

PARISH POSTERS

TOP 5 GIFT AID MYTHS

Don't let the following misconceptions get in the way of signing up to Gift Aid.



I'M A PENSIONER, GIFT AID DOESN'T APPLY TO ME

If you pay tax on a pension or capital gains taxes on investments then YES you CAN Gift Aid - up to the amount of tax you've paid.

HMRC WILL AUDIT OR REVIEW MY PAST YEARS' RETURNS

Gift Aid filings do not trigger anything in HMRC's database, but are simply to check you're a taxpayer on record. No connection to your past returns, or triggering of an audit will result.



I'M A HIGHER RATE TAXPAYER, I'M NOT ELIGIBLE

Yes you are! If you Gift Aid your donations, the parish can claim an extra 25p for every £1 that you give, and you can reclaim the difference between the basic and higher rate of tax for yourself, when you complete your tax return.

THE GOVERNMENT WILL CHECK MY IMMIGRATION STATUS

No. Gift Aid has nothing to do with immigration and legal status. No information is shared with policing agencies.



MY TAXES WILL GO UP IF I CLAIM GIFT AID

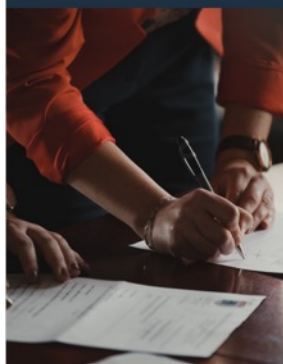
No. Gift Aid is retrospective. It has nothing to do with future taxes; it's about tax you've already paid.

Ask your Parish Priest or Gift Aid organiser for more details or to sign up.



www.abdiocese.org.uk

Registered Charity No. 252878



A STANDING ORDER IS THE BEST WAY TO GIVE

Give safely and save time with a Standing Order

5 Reasons to set up a Standing Order:

Standing orders are accurate, Covid safe, and secure.

They avoid a last-minute scramble for cash before Mass and save your parish time and resources.

Standing Orders have lower costs and lower risks.

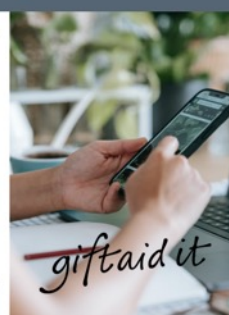
Standing Orders allow you to donate if you are unable to attend Mass in church.

Your contribution can be given on the day of your choice; you choose the amount and the frequency.

Please contact your priest, the parish office or visit your church website for information on how to set up a standing order.

www.abdiocese.org.uk

The Diocese of Arundel & Brighton is a Registered Charity No. 252878



MAKE YOUR DONATION GO FURTHER!

giftaid it

Sign up today so our parish can claim an extra 25p for every £1 you give at no extra cost to you!

You just need to:

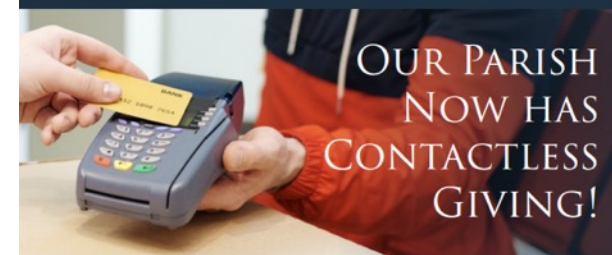
- Pay UK or Capital Gains Tax
- Donate via identifiable methods

Gift Aid helps our parish to thrive!

Donation			TOTAL WITH GIFT AID
Weekly	Monthly	Yearly	
£5	£20	£240	£300
£10	£40	£480	£600
£20	£80	£960	£1200
£25	£100	£1200	£1500

Ask your Parish Priest or Gift Aid organiser for more details or to sign up.

TAP TO DONATE



OUR PARISH NOW HAS CONTACTLESS GIVING!

Contactless giving: Encouraging safe giving

Your donations will maintain our beautiful church building and support the work, mission, and ministry of our parish.

Contactless giving is as easy as 1, 2, 3...

1. Select your amount
2. Hold your card against the card reader for donations of £100 or under. Chip & Pin can be used for larger gifts.
3. Add Gift Aid if you are eligible

giftaid it

Thank you for your generosity



www.abdiocese.org.uk

Registered Charity No. 252878

NEWSLETTER TEXT – STANDING ORDER OFFERTORY

Standing Order Offertory

Many of us have found our normal patterns of giving disrupted by the pandemic.

Standing orders are the best way to give, and can be easily Gift Aided, adding an extra 25% to your donation at no cost to you.

You can set up your Standing Order using internet banking or by going to your branch.

The parish has a Business bank account with the following details:

Account name: RCD A&B XXXX

Sort Code: 40-05-20

Account number: XXXXXXXXX

Please use your name as a reference – this is particularly important if you are a Gift Aider.

If you are a UK taxpayer please consider becoming a Gift Aider – contact the parish office to find out more.

Many thanks for your continued generosity and support .

[illegible]

- The best way a parish can improve their everyday income; average offertory increase 20-30%
- Increasing the number of Volunteers, Gift Aiders, Planned Givers and Standing Orders
- Promotes Christian stewardship and an 'Attitude for Gratitude'

WHAT IS A PLANNED GIVING DRIVE?

WEEK ONE



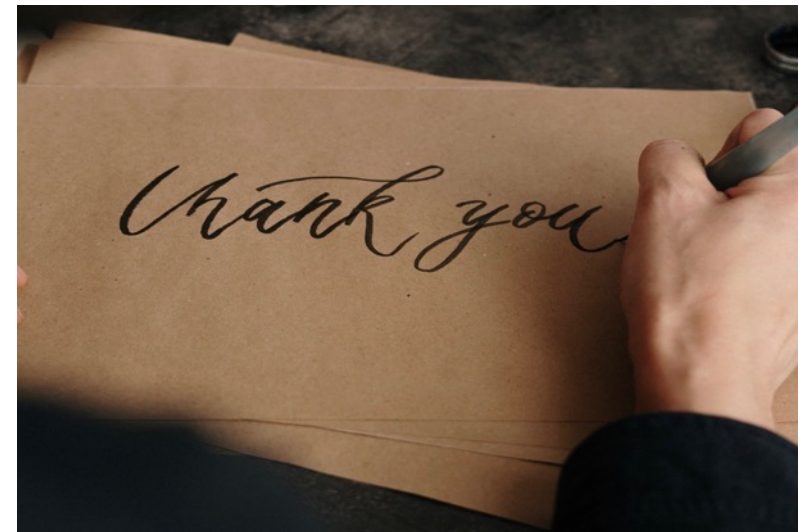
WEEK TWO



WEEK THREE



WEEK FOUR



WEEK 1:
OUR CALL TO
STEWARDSHIP

"Each of you should use whatever gift you have received to serve others, as faithful stewards of God's grace in its various forms". - 1 Peter 4:10

**Our Lady and St Philip
Howard, Arundel Cathedral**



**Our Call to
Stewardship**

Week 1 of 3

WEEK 2:
OUR PARISH
OUR
RESPONSIBILITY

Each of you should use whatever gift you have received to serve others, as faithful stewards of God's grace in its various forms". -
1 Peter 4:10

Our Lady and St Philip Howard, Arundel Cathedral



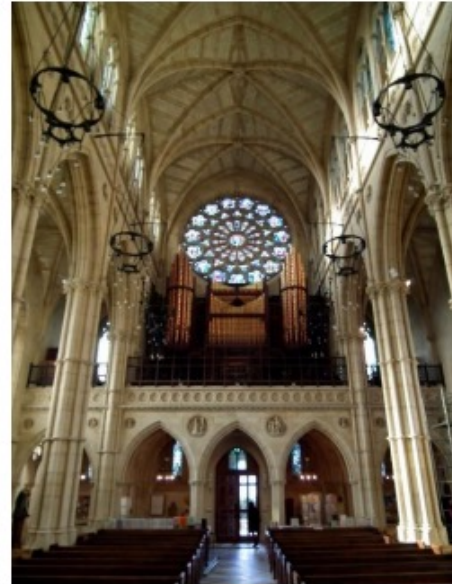
Our Parish Our Responsibility

Week 2 of 3

WEEK 3:
MY PARISH
COMMITMENT

“Each of you should use whatever gift you have received to serve others, as faithful stewards of God's grace in its various forms”. - 1 Peter 4:10

**Our Lady and St Philip
Howard, Arundel Cathedral**



My Parish Commitment

Week 3 of 3

ONLINE EVENTS



Considering contactless?

DONA free Zoom demonstration and live Q&A
10 November at 4pm

Already have a DONA?

Free Zoom refresher including how to maximise
your device.
1 December at 12 noon

To register your interest;

E: fundraising@abdiocese.org.uk



FINANCE OUTLOOK

2022 BUDGETING ASSUMPTIONS



- No change to levy calculation
- Gradual Offertory improvement in 2021 vs 2020 ~ 10%
- Pay award for cost of living: 2%
- Budget excludes capital project costs and potential rental income from Bishop's House
- Continued efficiencies from new ways of working: reduced travel and printing

PARISH LEVIES

- No change for 2022
- Levy is calculated on 2021 first collection – final amount confirmed by 31 March 2022
- Allowance of £9,500 per church maintained
- 35% levy on offertory after church allowance deducted
- Levies for training of future priests and care of retired priests frozen at 2020 level – allocated as per main levy

WINDFALL CONTRIBUTION

- **Windfall levy on disposals of parish land and buildings: 35% of net proceeds**
 - Windfall levy is NOT applied to other parish windfalls such as legacies
- **Exemption can be sought where:**
 - The parish faces a major capital project
 - The parish faces significant financial challenges and needs to retain the full windfall
 - Apply to DFC outlining the situation requiring a waiver

ACTIONS TO REDUCE THE DEFICIT



- Combining staff in one building to improve collaboration and reduce running costs
- Continue to seek efficiencies through sharing work differently
- Continue to review and re-tender contracts
- Fundraising – restart Planned Giving when the time is right
- Benefit from investment growth – 3% cash target

POST-COVID SUPPORT

- Furlough ended
 - HR support available if it is necessary to make changes regarding staffing
- Some loss of momentum on Health and Safety
 - Volunteer induction, phone support and visits; E: claire.johnson@abdiocese.org.uk
- Maintenance backlog; E: gareth.zaver@abdiocese.org.uk
- Fundraising needs – including contactless solution and planned giving; E: fundraising@abdiocese.org.uk
- IT advice and support; E: itmanager@abdiocese.org.uk
- Increase in cyber crime: IT infrastructure, fire walls, back ups, training



VOLUNTEER E-MAILS & CYBER SECURITY

VOLUNTEER EMAILS



- Emails for Gift Aid organisers, Parish Finance Chairs, Treasurers, Safeguarding Reps and Health & Safety Reps are being created in November 2021
- The Diocese is rolling out this programme to provide email access to key parish volunteers so that we are all on the same system
 - The primary reason is to enhance security and share information safely
 - This is a GDPR requirement
- Gift Aid organisers will be allocated a Diocesan @abdiocese.org.uk address
- The email address will be generic eg ga.burgesshill@abdiocese.org.uk
- Parish secretaries (if you have one), otherwise the parish priest or another volunteer will give access to the new system
- When you Log-on you will use two factor authentication (2FA)
 - Securing your user account with passcode by text
 - No one can access your emails and files without your phone
- Training will be provided via a document and guidance video on our website and queries can be sent to E: itmanager@abdiocese.org.uk

DIOCESAN EMAIL NETWORK



- After **1 January 2022** we will no longer send information to private email addresses
- We will only use @abdiocese.org.uk email addresses for parishes, clergy and key volunteers
- Requests for additional parish email addresses such as hallbookings.burgesshill@abdiocese.org.uk will be considered in the new year, as the initial roll out takes priority

CYBER SECURITY



- Cyber crime is escalating and gaining sophistication
 - Beware of phishing scams
 - The Diocese will never email you asking you to change password or enter username and password
 - We will never give out passwords by email
- Spoof accounts and email requests for financial transfers – be suspicious, pick up the phone
- Viruses - If in doubt, stop and delete:
 - Don't click on any links or open any attachments
- Hacking
 - Contact Ian E: itmanager@abdiocese.org.uk if you are worried



THE CATHOLIC DIOCESE OF
ARUNDEL & BRIGHTON

2022 FORUM
SATURDAY 29 OCTOBER
VIRTUAL EVENT

A large, illuminated question mark sign is the central focus of the image. The sign is a light brown or tan color with a dark brown outline. It is set against a dark blue background. The sign is illuminated from within, with several small, bright lights visible inside the loops. To the left of the question mark is a circular light fixture, also illuminated from within. The overall scene is a nighttime photograph of a large outdoor sign.

QUESTIONS?