



THE CATHOLIC DIOCESE OF  
ARUNDEL & BRIGHTON

# GIFT AID FORUM 2023

[www.abdiocese.org.uk](http://www.abdiocese.org.uk)



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# WELCOME

**Bishop Richard will open our forum at 9am**



# 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



## **Patricia Wrightson: Gift Aid Coordinator**

- Streamlining Gift Aid
- Envelope orders

## **Maggie Wares: Executive Assistant to COO**

- Applying for Grants

## **Sarah Kilmartin: COO**

- Parish Mergers
- Parish Charity Fund
- Banking and Contactless
- Volunteer email update

*All: Forum discussion – please participate via Q&A*

# GIFT AID RESULTS

A warm welcome to the 10 new Gift Aid Organisers and to those who have served for many years.

Your support has enabled funding to the Church of **over £1.2 million** this year:

<b>Envelope &amp; Standing Order</b>	1,010,860
<b>Contactless</b>	41,023
<b>Churchsuite</b>	8,128
<b>GASDS</b>	206,222
<b>TOTAL</b>	<b>£1,266,233</b>





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PATRICIA WRIGHTSON

**Gift Aid Coordinator**

# STREAMLINING GIFT AID WORK

Ways to **streamline your work** for next tax year end:

- Send annual donor tax letters by email to save time and postage costs
  - Use the parish newsletter to request donors' email addresses, update in GiftWise and tick email box

**Suggestion:** data cleanse your donors and terminate those who have stopped giving

- Produce **a master list report from GiftWise** and sort into Last Donation Date Order
- Terminate donors that have not donated for over 18 months or never donated – no date in the field (01/01/0001)
- Re-instating terminated donors at a later date – see “Restoring a GAD” page 14 of Gift Aid User Guide or Patricia can do it for you

<https://www.abdiocese.org.uk/administration-finance/fundraising-gift-aid>

# STREAMLINING



From the **master list report from GiftWise** check if donors still use their envelope boxes:

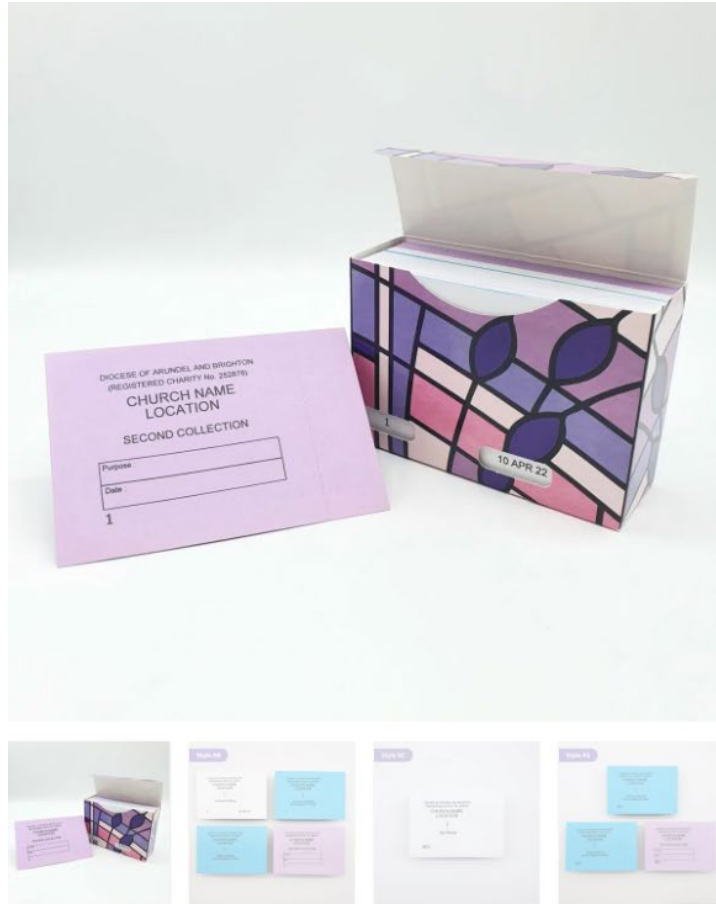
- If the donor has ceased using envelopes **amend their folio number back to the GAD number in the next tax year 2024/25** and do not provide further envelopes
- Always keep a list of the previous year's folio/donor numbers
- You can also use the **period donation report** to see how donors are giving



# ENVELOPE SYSTEMS UPDATES

- Envelope Systems have enhanced their **on-line ordering system** for orders 2024/2025 – deadline for ordering is end of November 2023
- Usual 3 choices of boxes, **there is no Easter in tax year 2024/2025**
- A slight price increase - £2.50 a full box
- 2<sup>nd</sup> collection and white only boxes will have an identification mark ☆
- Gift Aid Organisers who order envelopes via the paper form should request this ASAP and return it to Patricia by the end of November

# ENVELOPE SYSTEMS



## Offertory envelope order *St Thomas More Patcham*

Please follow the steps below to indicate quantities required of each envelope set style. Skip any styles not needed.

Scroll down to see full details of these styles and their specifications.

Step 1 of 4: Heading ^

Heading

- ☐ Same heading as previously  
☐ New heading

Step 2 of 4: Style AB v

Step 3 of 4: Style AC v

Step 4 of 4: Style AS v

Total £0.00

ADD TO BASKET

- If you need support with your on-line ordering of envelopes contact Patricia for a one-to-one Zoom or phone call
- One-off envelopes are still available, order from Patricia





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# APPLYING FOR GRANTS

**Maggie Wares, Executive Assistant to COO**



# BIDDING FOR GRANTS



Some parish projects could be eligible for external funding. The **National Lottery 'Awards for All'** programme provides **grants of up to £20,000** if your parish project aligns with the following goals:

- building strong relationships in and across communities
- improving places and spaces that matter to communities
- helping people to reach their potential
- Supporting people, communities and organisations that are facing challenges as a direct result of the cost-of-living crisis

The application can be made online via the and managed by the parish: [www.tnlcommunityfund.org.uk](http://www.tnlcommunityfund.org.uk)

# NATIONAL LOTTERY CRITERIA

National Lottery Funding is available for projects that serve the whole community, especially those who may otherwise be excluded or underserved. They fund:

- capital costs (such as building and land improvements)
- staff costs
- running costs
- activities
- equipment
- other core costs needed for the project

**They do not fund religious activities, however church projects such as AV systems have been funded because of benefits for inclusion**



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# UPDATES FROM COO

**Sarah Kilmartin**



# WHEN PARISHES MERGE



- Sometimes one Gift Aid Organiser will take over the role for the enlarged parish, with the other stepping down
- When parishes merge, we seek to implement a single bank account for the newly formed larger parish (which sometimes has a new name)
- The GAO role can be shared if both volunteers are willing – one does envelopes and the other standing orders – each will have their own [abdiocese.org.uk](http://abdiocese.org.uk) email

# WHEN PARISHES MERGE



- Patricia runs reports on GiftWise of all the donors from both former parishes and merges the individuals to the nominated successor parish
- Neil (CARN) re-attaches the GAD scans to the donor record for each donor
- Ideally this should be done on April 6 to avoid envelope number clashes
- If we do this mid-year Patricia will allocate suffixes to folio numbers so that individuals can be identified
- Standing Order donors to the closing bank account will be written to with a new Standing Order Form and covering letter. Patricia will send this to the GAO to pass on to donors.
- GAO processes the Standing Order Form as usual, updating the system with date and amount details and then sending the form on to the bank.

# CONTACTLESS GIVING



## **Some parishes are experiencing technical challenges:**

- Preferably connect to wifi not via dongle
- If you have a dongle, check that the network has a good mobile connection in your church
- Sometimes church walls are too thick for wireless signals and a survey will be required to come up with a solution
  - The Diocesan IT Manager can signpost support for this
- For new contactless devices we recommend Dona



# BANKING MATTERS

Branches of banks still closing at pace, continue to ask your donors to review their choice in donating:

- Standing order remains the preferred option
- Contactless is now very widely used within the Diocese
- The decline of bank branches has continued making the banking of cash increasingly difficult and time consuming
- Please promote Gift Aid wherever you can, we have posters for this

# PARISH POSTERS

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## 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.**


*giftaid it*

[www.abdiocese.org.uk](http://www.abdiocese.org.uk)

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

## 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.

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## 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

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# PARISH CHARITY FUND



- All **parish donations** are eligible for Gift Aid
- This includes funds raised to help the wider community
- A **parish charity fund collection** is different from a third party second collection for a named beneficiary like CAFOD. When we collect for CAFOD we hold the funds as a creditor not income and do not claim Gift Aid.
  - We do not name a beneficiary organisation when collecting for the parish charity fund
- When we raise funds for the parish charity/hardship/overseas fund etc. the funds then **belong to the parish** and are expensed as a grant to a beneficiary later
- Using the Parish Charity Fund, the priest, with advisers, can make grants to individuals or organisations in need



# DIOCESAN EMAIL UPDATE

**The volunteer email project is now being finalised.** Eligible volunteers will hear from our IT Manager Ian O'Sullivan with the following:

- An email with instructions how to set up your volunteer 365 email account via office.com
- A text from RCDAB with the password for your email account

You will only get this if we have your personal email address and mobile number (from your parish secretary or Parish Priest)

- If you do not receive this email and text by **Monday 5 November** contact E: [cooea@abdiocese.org.uk](mailto:cooea@abdiocese.org.uk) as this means we do not have your information.
- Let Maggie know your name, personal email address, mobile number, parish and role and we will set you up. Please don't contact Ian directly on this project.

***Cyber attacks: Please continue to be very suspicious of unexpected email requests, especially "your account is expiring, update your details now"***

# HELP & SUPPORT



- If you have problems **importing standing orders** from HSBCnet Patricia can help - sending you your parishes' files or importing them for you
  - Please try to ensure your work is carried out **at least every quarter** - your parish relies on the income from Gift Aid, it makes a difference
  - If you would like additional training, please ask, Patricia is more than happy to assist - her working hours are 8am to 4pm Tuesday to Thursday;
- E: [patricia.wrightson@abdiocese.org.uk](mailto:patricia.wrightson@abdiocese.org.uk);
- T: 01293 651145





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Q&A





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**2024 Forum**

**SATURDAY 9 NOVEMBER**

**Virtual Event**