



## GUIDE 2: Gift Aid Job Description

### Overview

This guide is for parishes considering appointing a Gift Aid Officer and for Gift Aid Officers getting started in the role.

In many parishes the PCC Treasurer is assisted by a Gift Aid Officer. Having a separate dedicated Gift Aid Officer helps to make sure that parishes get the most out of Gift Aid. It also reduces the treasurer's workload, reducing the risk that s/he becomes overburdened.

The post may be known locally by other titles, such as Committed Giving Secretary, Planned Giving Officer, Stewardship Secretary, Envelope Scheme Administrator or even Covenant Secretary. The important thing is what the person does, not the title.

### Outline job description and person specification

**Overall objective:** To help the parish develop its mission and ministry with confidence by promoting and implementing effective planned giving methods across the entire parish community.

**Reports to (or works in close co-operation with):** The PCC Treasurer

The post-holder can be a member of the PCC, or be co-opted on to it. As a minimum they should present an annual report to the PCC, highlighting achievements over the past year, and proposed actions for the coming year.

#### Key tasks probably include:

- encouraging all church members to support the church regularly
- welcoming newcomers and introducing them to methods of planned and tax effective giving
- encouraging taxpayers to give tax-efficiently through Gift Aid, payroll giving etc
- administering the Gift Aid scheme including making sure Declarations are made properly and records kept
- administering Gift Aid envelope schemes and regular Gift Aid giving through standing orders
- submitting Gift Aid reclaims periodically to HMRC
- sensitively following up those who default on their pledges
- thanking people for their contributions at least once a year
- providing progress reports and analyses to the PCC
- helping people to give one-off gifts (eg donations in memory, shares)
- helping local residents and casual visitors to give tax effectively (eg Friends, Gift Aid envelopes)
- sharing good ideas and best practice with other local churches

Depending on the individual and parish structures, other tasks might include:

- helping to maintain the Electoral Roll, church family list etc
- helping to organise any “time and talents” schemes
- helping the church to organise an annual renewal of stewardship pledges
- promoting Christian stewardship and money management in the church’s teaching syllabus
- encouraging members of the church to make a will, to review it regularly and to consider leaving a tax effective gift to the church in their wills
- organising a “stewardship committee” or equivalent
- co-operating with any major capital appeals etc
- investigating potential new ways of generating regular income for the parish
- keeping up to date with changes in Gift Aid regulations etc

### **Outline person specification:**

Essential requirements :

- able to maintain absolute confidentiality about people’s donations
- a good head for figures
- well organised
- able to keep detailed records in an accurate and timely manner
- sensitive to people’s personal financial pressures
- able to work closely with the treasurer and incumbent.
- probably computer literate, especially basic spreadsheets or use of the internet, as it is likely that you will want to claim online, and keep electronic records.

### **Support available:**

The role of a Gift Aid officer is an important one and you should not feel alone! You should be able to count on the support of your PCC and incumbent, and there are other sources of help too. The Gift Aid section on [www.parishresources.org.uk](http://www.parishresources.org.uk) should tell you much of what you need to know in order to administer a Gift Aid scheme properly within your church, and also points you to other helpful websites and sources of further information.

Your diocesan Stewardship officer or similar will be able to help you set up and run a Gift Aid scheme in your church. Many churches already have Gift Aid schemes and officers in place; why not ask a neighbouring church for help and advice?

Your diocese will almost certainly have a Stewardship Officer or similar who will be able to offer advice and support. Some dioceses (including Canterbury, Lichfield, Liverpool, Manchester, Peterborough, Portsmouth, Southwell & Nottingham and Worcester) even offer a Gift Aid service to their parishes whereby the diocese reclaims Gift Aid tax on behalf of a number of parishes, so check the options with your diocesan office before you launch your own.

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Disclaimer: The Parish Resources Gift Aid Guides in the series are intended as guidance only. You should consult HMRC or other professional adviser if you are in doubt as to the Gift Aid regulations. This Fact Sheet was produced in August 2015 and is available to download from the Parish Resources website at <http://www.parishresources.org.uk/giftaid.htm>