

# A PARISH FUNDING PROGRAMME

*Bringing Together:  
Our Vision for the Future, Our plans and  
Initiatives, Our Funding Needs,  
Our Prayerful Response*



*Grateful thanks are acknowledged to the Diocese of Guildford, and to Tony Hennessey-Brown who established this programme and Juliet Evans who has helped in the development of the programme.*

*Further development of the programme has been delivered by The National Parish Resources Team in 2015.*



# AN INTRODUCTION

## *The Purpose*

The principal purpose of '**The Parish Funding Programme**' is to generate sufficient Planned Giving to enable Parishes to fund their continuing mission and future plans.

The programme has, at its heart, the discernment and communication of God's vision and purpose for the Parish, together with any planned initiatives. This forms the basis for assessing future funding needs and the required increase in planned giving.

## *The Context*

A Parish Funding Programme is intended for Parishes, which have:

1. A desire to carry out plans for mission growth which require additional funding
2. A need to reverse current or prospective deficits, in order to continue their mission

The Programme is designed in a flexible format so that it can be adapted by Parishes to meet their particular needs and circumstances. The success of the Programme relies on a foundation of teaching and prayer. This underpins implementation and helps individuals to respond to God's love by making generous use of the financial gifts for which he gives us responsibility.

## *A Description*

A Parish Funding Programme leads up to a presentation to potential givers of the vision, plans and funding needs of the parish, at a suitable Parish Event.

The Programme is based on **SEVEN STEPS** found to be common to successful funding programmes, drawn from the experiences of many Parishes in varied locations. Each step is vital to the success of the whole and none should be omitted. The timetable is flexible but it is unlikely that an effective programme will take less than three months to complete.

Parishes are encouraged to adopt or adapt the Programme's descriptive and sample material to fit the needs and characteristics of their own situation.

## *The Benefits*

The first 80 completed Parish Funding Programmes saw:

- Clear vision and plans for future growth
- An average of 30% increase in annual planned giving

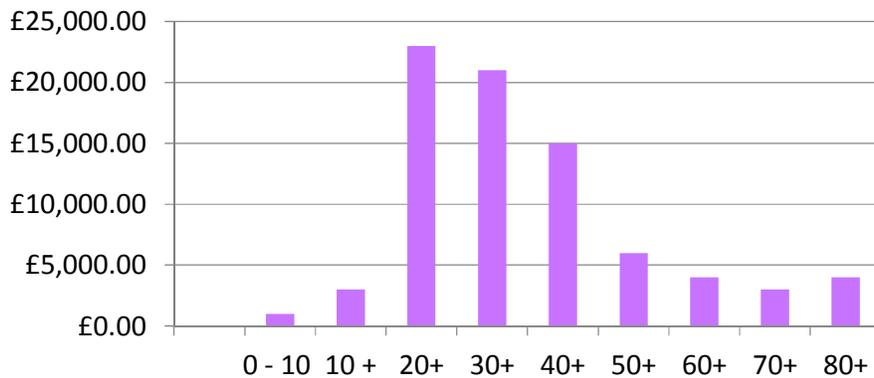
The graph overleaf shows an analysis of performance to date.

# SPIRITUAL & NUMERICAL GROWTH

We spoke to over 80 parishes and asked them about their experiences of The Parish Funding Programme. The overwhelming majority of parishes said they'd seen an increase in the number of planned givers as well as an increase in the amount they pledged.

Here are some of the highlights ...

**Increase in Planned Givers and Planned Giving**



*Aggregate Increase of £1.4m pa*

*It's celebratory...*

"It's about a body, a community coming together, and most importantly moving forwards together. At its very heart the programme is celebratory." Juliet Evans, Diocese of Guildford

*Over 1,500 NEW Planned Givers*

"I would 100% recommend The Parish Funding Programme to all parishes out there – it completely changed our approach to church life. We're a fuller, more vibrant church now, and have the financial security to achieve our vision."

**Charlie Hobbs, Churchwarden**

*" 99% of parishes would recommend The Parish Funding Programme. "*

# STEP 1

## *Full & Open Commitment from the Church Leadership*

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### *1.1 The Role of the PCC*

The PCC's prayerful and committed leadership is vital to the success of the Programme

**Corporately:**

From the very outset, the PCC should confirm its prayerful, public and practical support for the Programme and the appointment of the Parish Funding Team.

**Privately:**

During the course of the Parish Funding Programme, each individual member of the PCC should also prayerfully consider their own individual response to the funding requirement BEFORE an approach to a wider audience is made.

### *1.2 Choose a Team Leader*

It is important that the Parish Funding Programme is led by someone who will:

- Hold the respect of the church community
- Lead and encourage the team positively
- Fully consult with the PCC and involve them at key stages
- Oversee and co-ordinate the Programme's timetable

### *1.3 Creation of a Parish Funding Team*

The Team will have responsibility for implementing the programme on behalf of the PCC.

**A team profile might include:**

- The Team Leader (as chair and co-ordinator)
- A Churchwarden
- Treasurer / member of Finance Team
- The Incumbent
- Parish Giving Officer / Stewardship Promoter

You may want to recruit additional members as and when necessary to help with the co-ordination of communications, parish events or other specific tasks.

*TEAM PRAYER LORD, We have come together in the name of Christ to offer our thanksgiving for all the wonderful gifts of creation and redemption, to hear and receive God's holy word, and to pray for the needs of the parish, that by the power of the Holy Spirit we may give ourselves to the services of God. In your name we pray, Amen*

# STEP 2

## *Discovering and Sharing God's Vision*

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### *2.1 A Compelling Vision*

A compelling Vision, together with some resulting future plans for the Parish, is at the heart of the Parish Funding Programme. These need to be formed and distilled into a presentation, communicated at the Parish Event. The Vision and Plans should capture the imagination of the parish at large and give clarity to the financial requirement.

### *2.2 A Parish Vision Day*

In order to take this step, the leadership should prayerfully consider why a new vision is needed and when is the right time to commit to the process. A PCC Away Day or Parish Vision Day focuses on the process of discerning God's vision for the parish and forming some outline plans for the future.

Creation of the Vision and Plans will usually be led by the Incumbent and PCC (possibly a small team), but should involve thorough consultation with the 'grass roots' of the Parish. There are various ways in which this vital step can be taken, and many parishes have applied the process successfully.



**PLEASE SEE SUPPORTING GUIDE:** [Forming A Parish Vision, Priorities and Plans](#)

### *2.3 Communicating and Consulting*

Although the leadership role of the PCC is crucial, it is also vitally important that the wider church family is fully involved in the discernment of God's vision and is committed to the resulting priorities.

**The PCC may wish to consider the following:**

- Ask church members to complete a simple questionnaire
- Request comments and/or questions for the Away Day
- Invite church members to a Parish Away Day

It is important that the Vision and Plans are presented to the church family either through a parish event, or during a service, together with a leaflet summarising the key points.

*TEAM PRAYER Heavenly Father, We pray that our picture of the future would not be limited to our own hopes, ideas and agendas, but that they would ultimately come from you. Birth your vision in the hearts of your people and may the pursuit of your vision bring honour to our Lord and Saviour Jesus Christ. Amen*

# STEP 3

## *The Budget and the Income Target*

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### *3.1 Create the Funding Budget – Money Follows Vision*

The Funding Budget for the next 3 years should reflect the funding of new initiatives as well as the resourcing of continuing activities, as identified in the Vision and Plans. The budget should never be created in isolation from the vision process. This step requires the Parish Funding Team to work with the Treasurer / Finance Team.

### *3.2 Assess the Target for Future Income*

Assess the target for future income and how much of it needs to be raised by increased planned giving. If the new initiatives have a significant financial cost, it may be beneficial to show target income options with and without the planned initiatives to demonstrate the impact of achieving the upper target.

**For Example:**

- a) Our current financial position is £XXX
- b) Our overall target is to see an increase by £XXXX
- c) How could this be achieved?

### *3.3 Create a Required Giving Profile*

Some people find it difficult to process large numbers. To make the financial target 'more accessible' parishes have found it useful to provide a Required Giving Profile. This can be extrapolated from the existing profile of planned giving to demonstrate how the target for regular planned giving can be reached.

**For Example:**

"Currently, X number of households gives regularly to the church. If we could increase that to X number and they were ALL able to contribute an additional £2 per week (the cost of a takeaway coffee) our annual income would rise by £20,000"

### *3.4 Maximise Gift Aid*

Demonstrate how Gift Aid (including Payroll / Share Schemes) can be maximised and how it can contribute towards the target for future income.

**For Example:**

"If you are a tax payer, please complete this Gift Aid form (thereby increasing my/our gift by an additional 25p for every £1 we give, at no further cost)."

*TEAM PRAYER* Generous God, we thank you for Your abundant blessing and all that you have entrusted us with. By your Spirit we pray for gifts of wisdom and foresight when making these important financial decisions in our Church. Amen

# STEP 4

## *Preparing the Parish Funding Leaflet and Presentation*

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### *4.1 Create an Information Leaflet*

The Parish Funding Team should create an information leaflet or summary hand-out to distribute to current and potential givers detailing the vision, plans and financial targets of the church. Each parish should convey its own characteristics and content.

**For Example:**

- An introduction from the Incumbent
- Our Vision and Mission / Plans for the Future
- A Prayer
- Current Financial Position and Financial Target to increase year on year
- Current Giving Profile (and, if appropriate, Required Giving Profile)
- How to respond / How you can help (NB enclose a response form and envelope)
- A deadline for responses, and a reminder that all responses will be treated in confidence



**PLEASE SEE EXAMPLE TEMPLATE:** [Our Church, Our Vision, Our Future](#)

### *4.2 Preparing the Parish Funding Presentation*

The Parish Funding Team prepares the Parish Funding Presentation. Each parish should convey its own characteristics and content including stories, photos, engaging statistics (e.g. charts, graphs, key numbers) and quotations from local church life.

**You may wish to structure your presentation in the following way:**

- A positive and lively review of what the church is for, its history and role in the community.
- An outline of the parish's vision, continuing priorities, new initiatives and their potential impact.
- How these plans will be carried out and the financial resources required.
- The Funding Budget
- The Income Target and The Required Planned Giving Profile

Prior to the Event, the PCC should have the opportunity to review the Presentation and to consider prayerfully their individual responses to the funding requirement.



**PLEASE SEE EXAMPLE TEMPLATE & GUIDE:** [Presentation Outline](#) & [PFP Template](#)

*TEAM PRAYER* O Lord, we acknowledge your power over all that will be done, spoken, thought and decided and ask you to anoint our ideas and energy, so that even the smallest accomplishment may bring you glory. Amen

# STEP 5

## *Preparing the Parish Funding Event*

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### *5.1 Timing*

The church will need to consider when to hold its event – generally avoiding holidays and the month of December. Many parishes choose spring, autumn or a patronal festival date.

**You may wish to consider:**

- What other church and the community events are already organised and avoid clashes.
- Local demographics, which may determine if the event is to be held in the morning, afternoon or evening – or on a weekday or at the weekend?
- What refreshments might be provided at the event e.g. tea and biscuits / parish supper / buffet / lunch / afternoon tea etc.

### *5.2 Location*

Events should be carefully structured to appeal to the specific ‘target’ groups of people and it is important that it has suitable facilities and is accessible to all. Generally the event is held in the church hall – or the church itself.

### *5.3 Format*

The Event should attract as many people as possible and a sense of occasion and importance should be generated throughout the Church community. In larger Parishes, it may well be advisable to hold more than one event to attract different congregations/groups.

A well-respected and effective communicator who will encourage positive responses should lead the Parish Funding Presentation event. The Presentation should also incorporate input from the incumbent to give authority and accreditation. The full commitment of the church leadership and the PCC should be emphasised.

**An event could comprise of the following:**

- A time for arrival and welcome
- Meal / Buffet / Refreshments
- Introduction from the Incumbent
- The presentation (led by a well-respected and effective communicator)
- Closing remarks / Prayer from the Incumbent
- Thank you for attending

At the end of the Event, a synopsis of the Presentation should be given, and the Parish Funding Leaflet and Confidential Response Form and Envelope should be made available to attendees. (NB the Leaflet, Confidential Response Form and Envelope should also be distributed to all non-attendees on the Contact List)

## 5.4 The Contact List

The principal objective is to encourage all those who will consider themselves having some interest in the future life and mission of the church to attend the Parish Funding Event. Wide consultation within the Parish during the vision and planning process will increase their interest in attending the event.

It is essential to create a well-researched list of contacts who are existing or potential planned givers, and invite them to attend the Parish Funding Event.

### **Contact groups to be approached will normally include:**

- Electoral Roll Members
- Existing Planned Givers
- Special Service Worshippers or Attendees
- Church Hall Users
- Post Baptism Families and Wedding Couples
- Church Magazine Recipients
- In some cases, Local Residents / Businesses in the wider community could be contacted

A member of the Parish Funding Team should take responsibility for co-ordinating creation of the contact list at an early stage in the programme. The final list should be reviewed carefully and sensitively.

## 5.5 Invitation Cards

Invitation cards should come from the Churchwardens, supported by a personally signed letter from the Incumbent. It should emphasise that the Event is simply to provide an opportunity to hear about the Church's Vision and Plans, and people are not expected, to make a financial donation at the Event itself.

A small 'Events Team' should arrange for invitations to be delivered and followed up to encourage maximum attendance. They should be handed (preferably) or sent out at least four weeks before the event and advertised regularly leading up to the event date.

### **A Sample Invitation might include:**

- A warm invitation
- Outline of the Event including Date, Time and Venue
- An enquiry regarding any dietary requirements (if applicable)
- A Reply Card



**PLEASE SEE EXAMPLE TEMPLATE:** [Sample Invitation Letter](#) and [Card with Reply](#)

*TEAM PRAYER Heavenly Father, thank you for the gift of life, love and your Son, Jesus Christ. Help us to be generous in return, and support our Parish as it seeks to serve you, and proclaim the Gospel afresh to each and every generation. Amen*

# STEP 6

## *Collection of Confidential Responses*

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### *6.1 Follow Up*

In order to optimise the impact of the programme, it is important that follow-up is prompt, sensitive and well organised. This step will significantly enhance the financial outcome and the feeling of corporate involvement.

It should be noted that 'follow-up contact/visiting' is different from 'home visiting' (More about the difference can be found on the Diocese of Liverpool's Giving in Grace website). The aim of the follow-up is to remind people of the deadline to return the response form, if it has not been received within 7-10 days.

The Presentation should alert the attendees and receivers of the Response Form and that they will receive a follow-up telephone call (or visit) to ensure that the contact team's call is expected. It is important to emphasise that the Contact Team is only telephoning/visiting people who are selected from the contact list as 'warm contacts', and is not asked to press people to respond, nor to discuss levels of giving. The emphasis is on encouraging willing responders to do so promptly.

### *6.2 The Co-ordinator*

The contact team needs to be recruited well before the Event takes place. Follow-up telephone calls and/or visits should be recorded and their responses advised to a member of the Funding Team who will act as the Co-ordinator. The role of the Co-ordinator is to confirm that the Contact Team is fully briefed well before the Event, to ensure that follow-up calls are made and to collate responses and feedback to the Parish Funding Team.

### *6.3 The Contact Team*

The Contact Team may comprise of some / all of the people who delivered invitations to the Event. This is a role which PCC members can be encouraged to undertake as part of their commitment to the programme. It is recommended that the Contact Team meet together for a 'Contact Briefing Session' to ensure that:

- They are able to answer/refer queries about the Confidential Response Forms.
- They understand their responsibilities – and limitations.



PLEASE SEE EXAMPLE GUIDE: [Contact Briefing Session Leaflet](#)

*TEAM PRAYER* Loving Father, we thank you for your gifts of love and grace. Teach us to see Jesus in the people we encounter, and to respond with loving, generous and open hearts. In your name we pray, Amen

# STEP 7

## *Saying Thank you and Continuing to Grow*

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### *7.1 Thanksgiving Service*

Confidential Responses should be presented at a Thanksgiving Service approximately three to four weeks after the Parish Event(s). In the upcoming weeks, the result of the Parish Funding Programme should be communicated and celebrated. Thank you letters should be sent promptly to all who have responded.



PLEASE SEE EXAMPLE TEMPLATE: [Thank you letter](#)

### *7.2 Vision Update Gathering*

It is strongly recommended that a 'Vision Update Gathering' be held subsequently (say after 6 months), where respondents are thanked collectively, and where a 'progress report' can be given on the vision, initiatives and plans communicated at the original Parish Funding Event. The Parish Funding Team may also wish to meet separately at this time to have a 'de-brief' on their experiences of the Parish Funding Programme.

### *7.3 Anniversary Celebration*

One year on from the Thanksgiving Service, it is a great opportunity to thank God for the year's blessings, recap what has been achieved and continue to look to the future by reviewing other ways of supporting the Church.

### *7.3 Keeping Stewardship on the Radar*

The Programme provides a solid foundation for on regular reviews of planned giving, connected to regular updates of the Parish Vision, plans and financial needs. It delivers an important message and whilst reaping the success of the Programme, why not continue to revisit stewardship on an annual basis?

#### **You may wish to consider:**

- Appointing a Parish Stewardship Promoter.
- Encouraging people to give their time and talents.
- Reviewing legacy giving in your parish.
- Encouraging on-going preaching and teaching on stewardship.

*TEAM PRAYER* Blessed are you, Lord God of all creation; through your goodness we have this money to offer, the fruit of our labour and of the skills you have given us. Take us and our possessions to do your work in the world. Blessed be God for ever. Amen

# CHECK LIST STEPS 1 - 7

## *STEP 1 Full & Open Commitment from the Church Leadership*

- The PCC are committed to the process and its successful outcome.
- The PCC are committed to prayerful leadership.

## *STEP 2 Discovering and Sharing God's Vision*

- The PCC and Congregation will form a compelling Parish Vision.
- The PCC will pull together plans for incorporation into the PFP presentation.

## *STEP 3 The Budget and Income Target*

- The Funding Team will create a 3-year budget, based on the Parish Vision and Plans.
- The Funding Team will assess how the Financial Target might be reached.

## *STEP 4 Preparing the Parish Funding Leaflet and Presentation*

- The Parish Funding Programme Information Leaflet is confirmed by the PCC.
- The Parish Funding Programme Presentation is confirmed by the PCC.

## *STEP 5 Preparing the Parish Funding Event*

- Organise and Deliver an Engaging Event and Presentation.
- Distribute Information Leaflet plus Confidential Response Forms.

## *STEP 6 Collection of Confidential Responses*

- Establish and co-ordinate a successful follow-up via the Contact Team.
- Collect Confidential Response Forms Pledging an Increase in Planned Giving.

## *STEP 7 Saying Thank you and Continuing to Grow*

- Present the Confidential Responses to God at a Thanksgiving Service.
- Send out thank you letters and provide follow up on plans and progress.

# EVALUATION

On completion of the Parish Funding Programme (PFP), it is recommended that the following form is completed and returned to your Diocesan Stewardship Advisor (or equivalent).

- |     |                                                                                                      |               |                |                |               |
|-----|------------------------------------------------------------------------------------------------------|---------------|----------------|----------------|---------------|
| Q1. | What is your overall assessment of the Programme's impact on your Parish?                            | Very Positive | Quite Positive | Quite Negative | Very Negative |
| Q2. | What is your assessment of the full PFP Pack Information Pack as a basis for planning the Programme? | Very Positive | Quite Positive | Quite Negative | Very Negative |
| Q3. | How closely did you adhere to the Programme as explained and published?                              | All Respects  | Most Respects  | Some Respects  | Not At All    |

## THE RESULTS

Q4. Which steps (if any) did you omit / change / find difficult?

- |    |                                          |      |        |                 |
|----|------------------------------------------|------|--------|-----------------|
| A. | Formal Approval by the PCC               | Omit | Change | Found Difficult |
| B. | Identifying a dedicated PFP Team         | Omit | Change | Found Difficult |
| C. | Creation of Vision and Plans             | Omit | Change | Found Difficult |
| D. | Creation of 1-3 year Funding Budget      | Omit | Change | Found Difficult |
| E. | Clear Funding Target                     | Omit | Change | Found Difficult |
| F. | Profile of Giving to Achieve Target      | Omit | Change | Found Difficult |
| G. | Presentation of Vision and Plans         | Omit | Change | Found Difficult |
| H. | Parish Funding Event                     | Omit | Change | Found Difficult |
| I. | Follow up Visits and Phone Calls         | Omit | Change | Found Difficult |
| J. | Presentation of Pledges at Gift Services | Omit | Change | Found Difficult |

Q5. How many Planned Giving Pledges did you receive?

New       Increased       = TOTAL

Q6. What was the value of these Pledges?

£ p/a       £ p/a + Gift Aid       = TOTAL £ P/A

Q7. What was the value of 'one-off' donations?

£

Q8. Would you recommend use of the PFP to other Parishes?

Yes       No