



ALLSAINTS

WOODFORD WELLS

| | |
|------------------------|---|
| Title | Fundraising Policy |
| Owner | Operations Director |
| Issue Date | July 2024 |
| Reviewed By | Rachel Whitelegg |
| Approved By | Risk and Governance Committee |
| Approved Date | March 2017 February 2019 July 2024 |
| Next Review Due | July 2025 |

General Fundraising

As set out in the Annual Report of the Trustees, the Parochial Church Council (PCC) recognises that as a faith community we rely principally on funding from members of the congregation, as led by God. All regular members of the church are encouraged to participate in a committed manner, through the Planned Giving Scheme (PGS), to the general financial needs of the church.

The giving page of the All Saints' website and the flyer found in the back of church chairs, include details of the various ways members can give to the church. The church's charity number and tax claim reference are clearly shown on all documents issued by the church in respect of any fundraising.

In overall terms the church aims to raise about 75% of the income required to operate the church from the PGS or regular collections held at the church services. The balance will come from other charitable activities.

The PCC will seek to expand the means by which the congregation can give to the financial needs of the church and recognises that new methods such as "mobile money" are becoming more acceptable. New methods will be subject to detailed scrutiny by the Senior Management Team (SMT) or Risk and Governance Committee (RGC) who will report and submit a recommendation before finally proceeding with the channel.

The PCC will ensure that all fundraising has a clear objective and funds raised for a specific purpose such as mission are clearly identified. As noted above the majority of the church's income comes from within the congregation. The church does not raise funds from the general public or use the services of an external fundraiser for general fundraising. The appointment of an external fundraiser is subject to the procedures outlined below for capital projects.

The actual amounts raised are reviewed regularly and compared with the previous year and the current budget. The costs involved in raising funds are separately identified and are reviewed to ensure that they are reasonable and within the expected parameters.

The attached appendix outlines some of the key controls and processes around the major fundraising activities of the church in respect of general and routine events

Capital Projects

Any major fundraising amounting to a significant proportion of the annual budget will be subject to its own procedures and reporting requirements. The PCC will ensure:

- a sub committee is formed of suitably qualified members of the congregation
- there are written reporting procedures and requirements
- the sub committee ensures that steps are taken to ensure that the fundraising complies with best practice as identified by the Charity Commission
- a separate bank account is used where necessary for all receipts
- there is a clear plan for the fundraising activities and anticipated cash flow arising from them
- any documents produced for the fundraising should clearly set out what the funds are to be used for and the benefits arising from completion of the project
- any application to grant making bodies is approved by the sub committee before being submitted
- any use of external fund raisers is monitored and controlled through written agreements. These agreements should clearly identify the costs involved in using the service provided

- the sub committee reports to the regular PCC meeting on its activities.

Any borrowing against future pledged income will be subject to PCC agreement.

All documents will clearly display the Charity's number and tax reference.

Appendix

Planned Giving Scheme (PGS)

The majority of planned giving by the congregation is by the means of tax efficient donations. The PGS is operated by the Planned Giving Officer (PGO) who is appointed by the PCC following a recommendation by the Treasurer. All records involved with the PGS are subject to the church's agreed Data Protection Policy.

The PGS is reviewed regularly throughout the year to ensure that the amounts received are consistent with the budget amounts approved by the PCC as part of the Annual Budget. The PCC receives reports on changes to the membership of the scheme and amounts given in an anonymised format.

The PGS utilises software designed for churches, and approved by the Diocese, to monitor and maintain the records which justify the amounts recovered in respect of Gift Aid. The PGO is responsible to the PCC for ensuring that all software updates are installed in a timely manner. The annual cost of the software updates and support is borne by the church. In addition to these costs the church purchases an annual supply of envelopes for members of the congregation who prefer to give weekly or monthly in this manner. Numbers of these are very low following a push towards giving via standing order during 2020/21.

Collections General

All cash taken at the normal services at All Saints' are subject to reasonable controls to ensure accurate and complete recording. Any cash received is banked as soon as possible after the event and is normally maintained in the church safe until banking. Cash received will form part of the church's claim under Gift Aid Small Donations Scheme (GASDS) subject to overall limits.

Collections Special

At some special services a collection is taken for a local or national charity. The congregation present at these services is told that the collection is for a specific charity before it is taken. These sums are recorded separately and as the sums are passed directly to the charity they are never deemed to be All Saints' funds. Similar controls are exercised over these collections as the normal collections at routine services. These collections are disclosed in the notes to the Annual Report and Financial Statements.

Gift Day and Annual Sale

At the Harvest Festival the church holds a "Gift Day" for home and overseas mission partners and agencies connected to the church. The Mission Committee and the vicar set the overall target and recipients for the funds. The funds are held in a restricted fund and are distributed each year usually within 3 months of the Gift Day. The totals raised and distributed are recorded in the Annual Report and Financial Statements.

The church holds an Annual Sale in November each year. Most of the items on sale are donated by members of the congregation. Some items are purchased specifically for the event and the stall holders are encouraged to sell the items at a price reflecting the quality of the product. Any items considered to be of a high value may be taken to a professional valuer or auctioneer for sale. The funds raised by the sale are used to support mission partners at home and overseas who reflect the church's values.

Outreach and One off Events

The church holds regular outreach events that require a payment from participants. The income received from this type of event is designed to be a contribution towards the costs involved but the event is not expected to operate at a profit.

The church also holds one off events such as Parish Weekends. These require a payment from participants. The pricing of any tickets is set so as to encourage the widest possible participation by the congregation. When pricing these events, the Treasurer and PCC seek to cover the majority of the direct costs and aim to fund the difference through a direct subsidy for the event from the General Fund.

The church may occasionally hold concerts or recitals which are advertised as fundraising events for a specific purpose such as the Organ Fund. Any funds raised through these events are held in the appropriate restricted fund. The organiser is responsible for ensuring that all costs incurred are proportional to the likely income received from ticket sales.

Hardship Fund

In early 2020 the church established a Hardship Fund in response to the onset of the Covid 19 pandemic. This is funded by donations largely from the congregation (as with PGS) and receipts are administered by the PGO. Requests for assistance from the fund are reviewed by the Hardship Committee in line with its terms of reference. As approved payments from the fund are processed as appropriate to the individuals.