



Stewardship Shoots

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Gift Aid – some changes

There were some announcements in last month's budget that were especially interesting for charities.

HMRC will allow on-line filing of Gift Aid claims from 2012. This will make it easier to claim and keep track of your claims as the “intelligent” forms will contain automatic checks for accuracy.

Charities that receive small donations of £10 or less will be able to apply for a Gift Aid on these donations without getting declarations. This means you should be able to claim on loose change in the plate (up to £5,000 in donations) and is likely to start in 2013.

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The SA Donate scheme is being abolished. This scheme allowed self-assessment taxpayers to direct any tax repayment to a charity of their choice. It was underused and difficult to find your way through the process, especially for those wishing to donate to parishes in the Church of England. The database of charities wasn't easily searchable and so it was almost impossible to find the correct St John's or All Saints!

Gift Aid – End of Transitional Relief

“What I need to do now?”

Transitional relief is the special tax relief introduced in 2008 to compensate charities for the loss of Gift Aid income which the basic rate of tax was cut from 22% to 20%.

The quick answer to the question “What do I need to do about the end of transitional relief?” is “Not much” but there are a few things to think about.

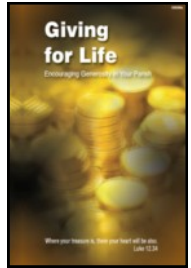
- Now is a good time to look at any literature on Gift Aid that you produce. Update any literature and Gift Aid declarations to ensure you say 25p for every £1 donated rather than 28p.
- When submitting claims relation to 2011 you need to claim separately for donations received up to 5th April, these will get transitional relief, and those received from 6th April onwards.
- Make sure you claim Gift Aid on donations made before 5th April 2011 before 31st Dec 2013 or you won't get transitional relief on these donations.

With the ending of transitional relief, and if nothing else changes, your income from Gift Aid will drop by about 11% so now might be time to think about promoting the Gift Aid scheme again in your church. Make sure that everyone who can has signed a declaration so you can maximise the amount of Gift Aid you can claim.

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Giving for Life - and saying “thank you”

One of the **Four Key Tasks** recommended by the *Giving for Life* initiative is for parishes to send an annual thank to their regular givers. Of course, it’s simply the polite thing to do! - but these letters are also an opportunity to remind people of what you have been able to achieve as a result of their gifts. The end of the tax year is a good time to send thank you letters and if you include the amount given and amount of Gift Aid collected then those filling out self assessment forms for HMRC can include this information on their form.



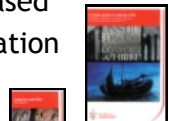
For some template letters, contact C&R or see the parish resources website at www.pariahresources.org.uk/giving/thankyou.htm

We still have some *Giving for Life* resources available, let us know if you would like some.

Legacies and Gifts in Wills

There was also good news on inheritance tax for those leaving money to charity. In the budget the Chancellor announced that a reduced rate of inheritance tax will apply where 10% or more of a deceased net estate is left to charity. There will be more information on this in the summers after a period of consultation.

Publicity on this change may well encourage people to think about leaving residuary legacies and may be a time for you to have a legacy campaign. The resources we sent out last Sept are still available so do contact us if you need more copies.



Gift Aid Secretaries' Evening

To help parishes maximise their Gift Aid income, and to let you know about some of the changes in the recent budget, we are holding a Gift Aid evening at Trinity House on:

Wednesday 4th May 6:30 to 8:00 pm

At the meeting we will cover the changes to the Gift Aid Scheme and also some of the basics for new Gift Aid Secretaries. We will tailor the evening to make sure we help those who are there so please let us know if you are going to attend. There will be light refreshments available from 6pm.

TRIO campaigns – some success stories

Two recent TRIO campaigns in Southwark churches increased the pledged giving by about 30%. Both parishes worked hard at producing good quality material to communicate the facts and figures about running the church in a straightforward way and also followed up members of their congregations that didn't initially respond.

One of these parishes commented that not only were they delighted with the financial response but there were a number of added benefits. By involving a large number of people in chasing responses, they feel they have all got to know people better with more of the congregation volunteering their time to help with other things such as intercessions and as sidespeople.

For more information and advice on stewardship and Gift Aid contact:

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The Diocese of
Southwark

Or see the Diocesan website at www.southwark.anglican.org