

## St Example finance action plan

Action	Activity involved	Who is responsible?	Cost and resources	When does it need to be achieved by?	What is the measure of success?
Write a new finance strategy document and finance activity plan for St Example	<ul style="list-style-type: none"> <li>• Write finance strategy document</li> <li>• Prepare activity plan document</li> <li>• Circulate to S &amp; F Committee for comment</li> <li>• Present to PCC for discussion and approval</li> <li>• Once finalised and approved, populate responsibility column</li> </ul>	<ul style="list-style-type: none"> <li>• ??? to write initial draft for circulation to the Standing and Finance Committee and then PCC</li> </ul>	<ul style="list-style-type: none"> <li>• None, except for time taken to produce the documents</li> </ul>	<ul style="list-style-type: none"> <li>• First draft to be presented to the PCC on 3 Oct 2024</li> </ul>	<ul style="list-style-type: none"> <li>• The PCC will have a clear understanding of the issues and plan for addressing these</li> <li>• Responsibility for action will be shared among a wide group, with actions carried out</li> <li>• Over time, an improvement in the finances will be seen</li> </ul>
Valuing and developing regular existing givers	<ul style="list-style-type: none"> <li>• Ensure that we have a current and up to date list of existing regular givers to the church</li> </ul>	<ul style="list-style-type: none"> <li>• Treasurer</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• By the end of Jan 2025</li> </ul>	<ul style="list-style-type: none"> <li>• We will have a clear picture of how many regular givers we have, and proportionally how much they contribute towards our income</li> </ul>

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	<ul style="list-style-type: none"> <li>Look at Parish Giving Scheme to see if it would be a helpful tool for future regular and one off giving</li> </ul>	<ul style="list-style-type: none"> <li>Treasurer, Secretary and Gift Aid Officer</li> </ul>	<ul style="list-style-type: none"> <li>None. All costs covered by Diocese</li> </ul>	<ul style="list-style-type: none"> <li>By the end of Jan 2025 for PCC approval if useful</li> </ul>	<ul style="list-style-type: none"> <li>If Parish Giving Scheme considered, it should reduce workload for both Treasurer and Gift Aid Officer</li> </ul>
	<ul style="list-style-type: none"> <li>Write annually to all regular givers to thank them, update them on impact of giving, and to invite them to consider their donation amount</li> <li>Ensure that all existing regular givers are signed up for gift aid where possible</li> </ul>	<ul style="list-style-type: none"> <li>??? to draft a letter which can be updated and amended. To be distributed by PCC Secretary</li> <li>Gift Aid Officer</li> </ul>	<ul style="list-style-type: none"> <li>Cost of stationery</li> </ul>	<ul style="list-style-type: none"> <li>By APCM 2025</li> <li>By the end of Jan 2025</li> </ul>	<ul style="list-style-type: none"> <li>Current regular givers will feel valued and have a clearer picture of the church's financial state, and we will hopefully see some increase in the existing giving amount</li> </ul>
Encouraging new regular givers	<ul style="list-style-type: none"> <li>Create a new good quality document showing ways to give financially to the church</li> </ul>	<ul style="list-style-type: none"> <li>???</li> </ul>	<ul style="list-style-type: none"> <li>Cost of design and stationery.</li> </ul>	<ul style="list-style-type: none"> <li>By the end of Feb 2025</li> </ul>	<ul style="list-style-type: none"> <li>We will see an increase in the number of regular givers to the church</li> </ul>

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	<ul style="list-style-type: none"> <li>Identify new attendees at church and after a period of regular attendance ensure they are given a welcome pack including a copy of the giving document</li> <li>Encourage new donors to sign up for gift aid where possible</li> <li>If online giving not possible, look at other options</li> </ul>	<ul style="list-style-type: none"> <li>Standing Committee to identify someone to do this</li> <li>Gift Aid Officer/ Treasurer</li> <li>Gift Aid Officer/ Treasurer</li> </ul>	<ul style="list-style-type: none"> <li>No cost for any other task</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing</li> <li>Ongoing</li> <li>Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>Those joining the church will feel valued and like they really belong because they are playing a part in the life of the church</li> </ul>
Increase the number of one-off donations received	<ul style="list-style-type: none"> <li>Use the new giving machine in the church for those visiting and those attending regular worship and occasional services/events</li> <li>Ensure that booklets and materials are available near to the giving machine</li> <li>Ensure that website has up to date giving information for all options for regular and one off donations</li> </ul>	<ul style="list-style-type: none"> <li>??? to collect and attend training with others</li> <li>CWs to check stock of history booklets etc and keep replenished</li> <li>??? to check</li> </ul>	<ul style="list-style-type: none"> <li>Initial cost of device + cost of the SIM card, then ongoing costs of £?? annually</li> <li>Costs of printing as required</li> <li>No cost</li> </ul>	<ul style="list-style-type: none"> <li>End of Nov 2024</li> <li>Ongoing</li> <li>ASAP, once parish giving scheme decision has been made</li> </ul>	<ul style="list-style-type: none"> <li>We will see an increase in one off donations</li> <li></li> <li>People will feel confident in knowing how they can go about making a one off donation</li> </ul>

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	<ul style="list-style-type: none"> <li>Consider a Gift Day once a year linked in with a wider community event</li> </ul>	<ul style="list-style-type: none"> <li>Standing and Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li>Costs relating to event only</li> </ul>	<ul style="list-style-type: none"> <li>End of 2024 ready for 2025</li> </ul>	<ul style="list-style-type: none"> <li>People will attend the Gift Day and make both one off donations and potentially commit to new regular giving or increasing their existing donation</li> </ul>
Ensure that policies are in place to support financial strategy	<ul style="list-style-type: none"> <li>Review and update Legacy Policy</li> <li>Produce Risk Management Plan</li> <li>Produce Reserves Policy</li> </ul>	<ul style="list-style-type: none"> <li>All to be reviewed by Secretary/ Treasurer and approved by PCC.</li> </ul>	<ul style="list-style-type: none"> <li>No cost</li> </ul>	<ul style="list-style-type: none"> <li>End of 2024</li> </ul>	<ul style="list-style-type: none"> <li>People will know we have a legacy policy and where to find it</li> <li>All necessary policies will be in place</li> </ul>

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<p>Review website to ensure that it is up to date with options for supporting the church financially</p>	<ul style="list-style-type: none"> <li>• Review one off and regular giving options</li> <li>• Upload and update the revised legacy policy</li> <li>• Update to include parish giving scheme info if approved</li> <li>• Check Easyfundraising still in use and publicise better</li> <li>• Check QR codes still working properly</li> </ul>	<ul style="list-style-type: none"> <li>• ??? to check and consider with Standing and Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li>• No cost</li> </ul>	<ul style="list-style-type: none"> <li>• ASAP, once parish giving scheme decision has been made and the policies updated</li> </ul>	<ul style="list-style-type: none"> <li>• We will see evidence of giving via the website</li> <li>• We will see access to the pages containing the information via the website statistics</li> </ul>

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Encourage Legacy giving	<ul style="list-style-type: none"> <li>Once policy updated, ensure it is readily available both online and in church and that people are aware of the importance of considering the church in legacy planning</li> <li>Create a leaflet about leaving a legacy to the church to be available in church, and also circulated to our mailing list</li> <li>Suggest that people let us know if they are planning to leave a legacy so that we can thank them</li> </ul>	<ul style="list-style-type: none"> <li>??? to update website</li> <li>In the giving documentation</li> <li>In the giving documentation</li> </ul>	<ul style="list-style-type: none"> <li>No cost</li> <li>Cost of stationery</li> </ul>	<ul style="list-style-type: none"> <li>ASAP once legacy policy revised</li> <li>End of 2024</li> <li>Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>Documents will be in church and on the website</li> <li>We may have been made aware of either existing legacies, or of new legacies that have been considered</li> </ul>
Create a focused plan for fundraising	<ul style="list-style-type: none"> <li>Appoint 1 or 2 people to oversee our fundraising events</li> <li>Plan a calendar of events for the rest of 2024 and all of 2025</li> <li>Once the events have been identified communicate these to the church and community</li> </ul>	<ul style="list-style-type: none"> <li>??? &amp; ???</li> <li>???</li> <li>???</li> </ul>	<ul style="list-style-type: none"> <li>Cost of any advertising</li> <li>Cost of any printed resources</li> </ul>	<ul style="list-style-type: none"> <li>By end of Nov 2024</li> <li>End of Nov for 2024</li> <li>As finalised</li> </ul>	<ul style="list-style-type: none"> <li>£5000 raised through fundraising activities in total for the year (could be broken down for each event if helpful)</li> <li>10 new people added to church mailing list from fundraising events</li> </ul>

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	<ul style="list-style-type: none"> <li>Once identified, add each event separately to this action plan with steps required to organise each and allocate roles</li> <li>Ensure that all events are publicised on local magazines, on website, social media, radio etc including if necessary, why we are running them</li> <li>Ensure there are enough people to run each event</li> </ul>	<ul style="list-style-type: none"> <li>Standing &amp; Finance Committee</li> <li>??? to update website and church social media. ??? to arrange distribution of flyers and publicise wider online</li> <li>??? &amp; ???</li> </ul>	<ul style="list-style-type: none"> <li></li> <li>Cost of materials for each activity (to be included with each individual event entry on this document)</li> <li></li> </ul>	<ul style="list-style-type: none"> <li>As finalised</li> <li>Ongoing</li> <li>Ongoing</li> </ul>	<ul style="list-style-type: none"> <li></li> <li></li> <li></li> </ul>
Look at current outgoings and eligibility for grant funding	<ul style="list-style-type: none"> <li>Look at grant organisations that might be willing to fund faith communities and projects adding social value</li> <li>Look at budget and current spending priorities and see if there are grant sources that may contribute towards them</li> </ul>	<ul style="list-style-type: none"> <li>Treasurer / Standing and Finance Committee</li> <li>Treasurer / Standing and Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li>No costs involved in this process</li> </ul>	<ul style="list-style-type: none"> <li>End of Feb 2025 and then ongoing when budget set for following year or following a QI inspection</li> </ul>	<ul style="list-style-type: none"> <li>We are successful in at least one grant application per year</li> </ul>

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Consider effectiveness of current activities and any that need to cease	<ul style="list-style-type: none"> <li>Look at current worship pattern and ensure we can afford to run what is happening based on cost, attendance and impact</li> <li>Look at wider programme of events and ensure we can afford to run what is happening based on cost, attendance and impact</li> </ul>	<ul style="list-style-type: none"> <li>Standing and Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li>No cost</li> </ul>	<ul style="list-style-type: none"> <li>End of 2024, and then annually</li> </ul>	<ul style="list-style-type: none"> <li>The PCC will feel confident that the activities run by the church are cost effective and providing the best impact</li> </ul>
Develop a Case for Support	<ul style="list-style-type: none"> <li>Convene a meeting / away day of the PCC to consider what we believe the church to be here for (use a facilitator if helpful)</li> <li>From this, shape something of a mission statement that we can understand</li> <li>Shape this into a Case for Support which can be used for funding applications as well as enable the congregation to feel that they better understand what the church's purpose is</li> </ul>	<ul style="list-style-type: none"> <li>Standing and Finance Committee</li> <li>PCC and ministry team</li> <li>Standing and Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li>Cost of any materials required</li> <li>Cost of facilitator?</li> <li>Cost of refreshments</li> <li>Cost of venue if not at church</li> </ul>	<ul style="list-style-type: none"> <li>Plan for 2024 once other tasks completed</li> <li>We will have used it for funding applications</li> </ul>	<ul style="list-style-type: none"> <li>We will have a Case for Support in place</li> <li>Church members will feel more confident about the role of the church in the community</li> </ul>



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Concert (Date)	•	•	•	•	•
Christmas Tree Festival and Fayre (Date)	•	•	•	•	•