

News and information for Parish Treasurers - March 2019

Annual Report and Accounts and Return of Parish Finance

Hopefully parishes have started to compile their year end accounts for 2018. These need to be presented to the APCM and signed off by the PCC Chairman and an Independent Examiner. Please forward your Annual Report and Accounts, the Independent Examiner's certificate and completed checklist for the attention of Yvonne Thompson, Finance Department, The Old Deanery, Wells, Somerset BA5 2UG by **31 May 2019**. A copy of the Independent Examiners Certificate can be found on the [diocesan website](#).

The Parish Finance Return is completed online. Please visit the Church of England website at parishreturns.churchofengland.org/ to input and view your Parish Finance Return – if you require login details then please contact [Yvonne Thompson](#).

The information given in the Finance Return is used directly by the National Statistics and Research Department to create the Parish Finance Dashboards.

Survey Form 2019 – Parish Share 2020

The 2019 Annual Survey form, together with a guidance booklet and a letter from the Bishop, was sent to your Churchwarden at the beginning of February. Copies of the letter and guidance booklet are available for download from the [diocesan website](#). If you need a copy of the survey form, please contact [Jessica Cook](#). A short video has also been produced to go through the survey form step by step; this is available on the [diocesan website](#).

Your 2020 Share will be based on the declaration made, so please do get involved and read the guidance carefully. Your signature will be required on the form and all boxes must be completed to avoid any resource being wasted on avoidable admin tasks.

The deadline for returning forms is **30 April 2019**. The survey forms will be scrutinised by Archdeaconry Scrutiny Groups in June. New benchmarking data has been obtained and the guide benchmark category information will be made available at these meetings.

Full forenames on Gift Aid claims – next steps

Following discussions with Charity Tax Group (CTG), HMRC had agreed that while charities should be strongly encouraged to provide full forenames (rather than just an initial) on Gift Aid claims wherever it is practical and possible to do so, this will not be mandatory, have a fixed start date (which had been mooted as April 2019) or apply retrospectively. This agreement (full details here) was contingent on HMRC being able to see a gradual improvement in the number of claims including full forenames.

Speaking to a meeting of charity shop representatives in Birmingham, CTG proposed the following next steps, which will be relevant to all charities claiming Gift Aid.

- Check what percentage of your Gift Aid records include a full forename
- If you hold a full forenames for donors include them in your Gift Aid claim
- Try to collect full forenames in future where practical and possible to do so – inform staff, volunteers and software providers about this
- Document any actions undertaken to improve collection of first name information
- Provide feedback to CTG on any difficulties experienced or negative responses received from donors

Parochial Fees

Fees for subsequent copies of Marriage Certificates have been increased from £10 to £11 with effect from 16 February 2019.

The amended Table of Parochial Fees can be found on the diocesan website [fees page](#).

Please contact [Yvonne Thompson](#) if you need any assistance.

Gift Aid Small Donations Scheme (GASDS)

Gift Aid related items of note in Budget 2018 included an increase in the Gift Aid Small Donations Scheme (GASDS) donation which will rise from £20 to £30 with effect from 6th April 2019. This falls in line with the maximum contactless payment: so all contactless donations up to £30 can be included in the GASDS. Please note: any donations made using the 'Chip and Pin' up to £30 and over, are subject to Gift Aid and cannot be included within GASDS.

Card Readers

With the continued decline in the use of cash, we are pleased to be highlighting the SumUp and iZettle card readers. Available from just £19 (+VAT) through Parish Buying with no contract, you can start taking card and contactless payments. Visit the [website](#) find out more!

Funding Bulletin

The Parish Resources and Development Team can assist with grants available to churches- they produce a comprehensive Funding Bulletin which is updated on a regular basis. It is automatically posted on the Luke14:28 forum or you can sign up to receive it directly by contacting [Sue Whitehead](#).

Training

Fees Training - for anyone who completes the Parochial Fees Return including clergy, administrators and treasurers. Tuesday 4 June 2019. 18:00 – 21:00pm at The Old Deanery.

Treasurer's Training Day - for new Treasurers and others who have not attended recently, Friday 4th October 2019, The Old Deanery, Wells BA5 2UG.

To register your interest in upcoming training during 2019 please email [Yvonne Thompson](#).

New treasurers should receive our "Welcome email" within three months of starting signposting you towards where you can find support in your role. If you are a new treasurer and haven't yet received this, please email [Jessica Cook](#).

From the Giving and Funding team

A new appointment

We are pleased to be able to let you know the name of the new Giving and Funding Adviser. This post is an update of the Stewardship and Parish Resources Adviser, recently vacated by Andrew Rainsford.

Gary Watson will be joining us on 29th April, having relocated with his family from the West Midlands. We look forward to welcoming him to the diocese.

For any queries on planned giving or grants in the meantime, please contact [Sue Whitehead](#).

Let's meet

Email and phone conversations have their place but sometimes there is no substitute for talking through an issue face to face. If you would like to pop in and see us, please contact [Steve Thomas](#) tel 01749 685136.

If you are receiving this Newsletter by post but have an email address and would be happy to receive an email version in future, please let us know by giving your email address to jessica.cook@bathwells.anglican.org.