

# Gift Aid Update



Keeping you in touch with Gift Aid issues - for Churches using the Diocesan Gift Aid Lite Scheme

Issue 8  
December 2008

## 'Happy New Year'

Best wishes to you and your family for a happy, healthy and peaceful 2009. Hope Christmas was spent in the same way too.

**Office Update** - since last writing, Sue and the Gift Aid has moved again, albeit within the same room. Whilst continuing to work closely with the Finance Section, I am now working closer with the Diocesan Stewardship Officer (Canon Peter McEvitt). Contact details remain the same.

## TRAINING OPPORTUNITY -

**Just booked** - basic training sessions for those involved in Gift Aid. Intended for any Church personnel involved in the administration of Gift Aid; Secretaries, Treasurers, Recorders or Churchwardens, who haven't attended basic training previously. Booking form in quarterly mailing. These will be held:-

Tuesday 3<sup>rd</sup> March 2009 - 2pm - Church House, Manchester

Saturday 14<sup>th</sup> March 2009 - 10am - Hollinwood St Margaret

Thursday 19<sup>th</sup> March 2009 - 7pm - Heaton Christ Church

## National Organisers 'Gift Aid Conference

Sue Warren attended this two day conference in Leeds at the end of November. This Conference is held annually for those operating Central Diocesan Schemes within the Catholic and Anglican Dioceses. HM Revenue and Customs have a large part of the agenda. Another topic covered this year was - Gift Aid in the credit crunch - very topical at the moment. The support and guidance received from this Conference is always welcomed and very valuable. Information on several areas including Tax Credits and higher Rate tax payers will be available shortly.

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**GIFT AID TOOL KIT - Go even further**  
HMRC have devised a new Tool Kit aimed at assisting those new to claiming on Gift Aid. There is some good FACT sheets and promotion material on this Took Kit. Currently this is only available on a CD-ROM. If you would like a copy

please request one when returning your quarterly claim papers. I anticipate also copying some of this information onto our website shortly.....

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## KEEP AN EYE ON OUR WEBSITE !

It contains a lot of useful information

([www.manchester.anglican.org](http://www.manchester.anglican.org)). Gift Aid is found under the Finance Section.

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## Report from Ian Gledhill (Audit Manager HMRC).

Ian spent the day with us on the 11<sup>th</sup> November to review all aspects of our Audit Programme. The following is an extract from his report letter:-

"I found the day both interesting and worthwhile. I feel it is very important for HMRC to help support the very good work that the Diocese is doing in relation to the self audit of Gift Aid claims. It is very encouraging to see that the parishes who had received a review this year had taken on board the recommendations from the previous self audit and that this was confirmed from the results of the visit. Overall the Self Audit regime seems to be working very well and the procedures and processes in place provide a robust review of the parishes' Gift Aid records. The auditors involved have all been undertaking the reviews to an acceptable level, but perhaps greater consistency could be attained with further training. I look forward to meeting again in five months time to review the regime further and the changes made to the audit paperwork".

**(We will work on the consistency!)**

## Remittance Advices

I have received several phone calls from Treasurers recently who were unaware of how much their submitted tax repayment claim was for. Could you please ensure that when you receive the remittance, following the submission of your claim, that you notify your Treasurer of how much tax and transitional relief they can expect?

**2009 Accounts** - Just a reminder, where the tax refund is paid directly to your PCC accounts, a 'contra' entry should appear in your cashbook.

Please ensure that any one offs to be included in the 'print run' for the April 09 quarter, are received in the office by Friday 20<sup>th</sup> March 2009

## 'Stewardship in a credit crunch' by Canon Peter McEvitt

The current economic climate must surely give cause for concern in all aspects of life and the Church cannot be immune from this.

The good news is that historically our giving levels have held up in times of economic downturn – far more than other 'voluntary' sector income – and we have every reason to hope that this will remain the case.

We must continue to use best practice in our financial stewardship – saying 'thank you' to those who support the work of our churches on an annual basis and promoting Gift Aid – both for regular givers and for those 'one-off' visitors. Pundits suggest that less than half of the amount that could be claimed from HMRC is presently being claimed – so there's room for improvement! If you are unsure whether something can be Gift Aided or not then contact us and ask. If we don't know the answer we know someone who does!

On a wider view we would like to encourage everyone to look again at the matter of Stewardship. There is a tendency to think only of money whenever we talk about Stewardship. It ought to be re-thought. There are a number of significant areas of life where our stewardship speaks volumes in terms of our perception of the world God has given us and how we look after it. Take, for example, energy saving light bulbs; they

save energy which in turn saves diminishing resources, they reduce global warming and they save you money! Or the matter of just where and by whom those 'cheap' clothes have been made available to us in our shops? Have they been fairly produced in a decent workplace with fair wages for those who have made them? Or does our rushing out to buy them without thought simply continue to 'enslave' workers in distant parts of the world. And we could go on.....

Perhaps the simple question we need to ask ourselves about our stewardship, our giving (to God through the Church and charitable causes), indeed our whole lives, is "are they Good Enough for God?"

**Dates for this quarter -**  
(period being claimed 1<sup>st</sup> October 2008 - 31<sup>st</sup> December 2008.)  
Last Sunday - Sunday 28<sup>th</sup> December 2008. Please do not include any payments received in 2009 in this quarter.

## Banking your collections

 - from the various visits undertaken during 2008, it would appear that many Churches are incorrectly taking expenses / paying bills, out of their collections. As you can see from guidance below, this practice is not acceptable under Charity Law. Please ensure that this issue is brought to the attention to the relevant people in your Church.

**"Banking** (CC8 Internal Financial Controls for Charities)  
Monies received should be banked intact, so that the trail of funds received can be easily followed, and this will aid your Independent Examiner / Auditor as well as HM Revenue and Customs.  
It is therefore recommended that all Bills are paid by cheque but, if necessary, that Petty Cash should be drawn separately, rather than holding back cash from takings.  
The Charity Commission state that receipts should be banked regularly and as soon as possible – at least weekly (CC8 Internal Financial Controls for Charities)  
You should vary the time and route, where possible, of going to the Bank."

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