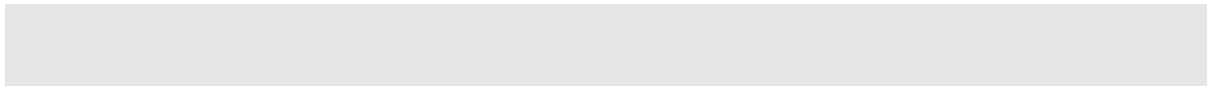
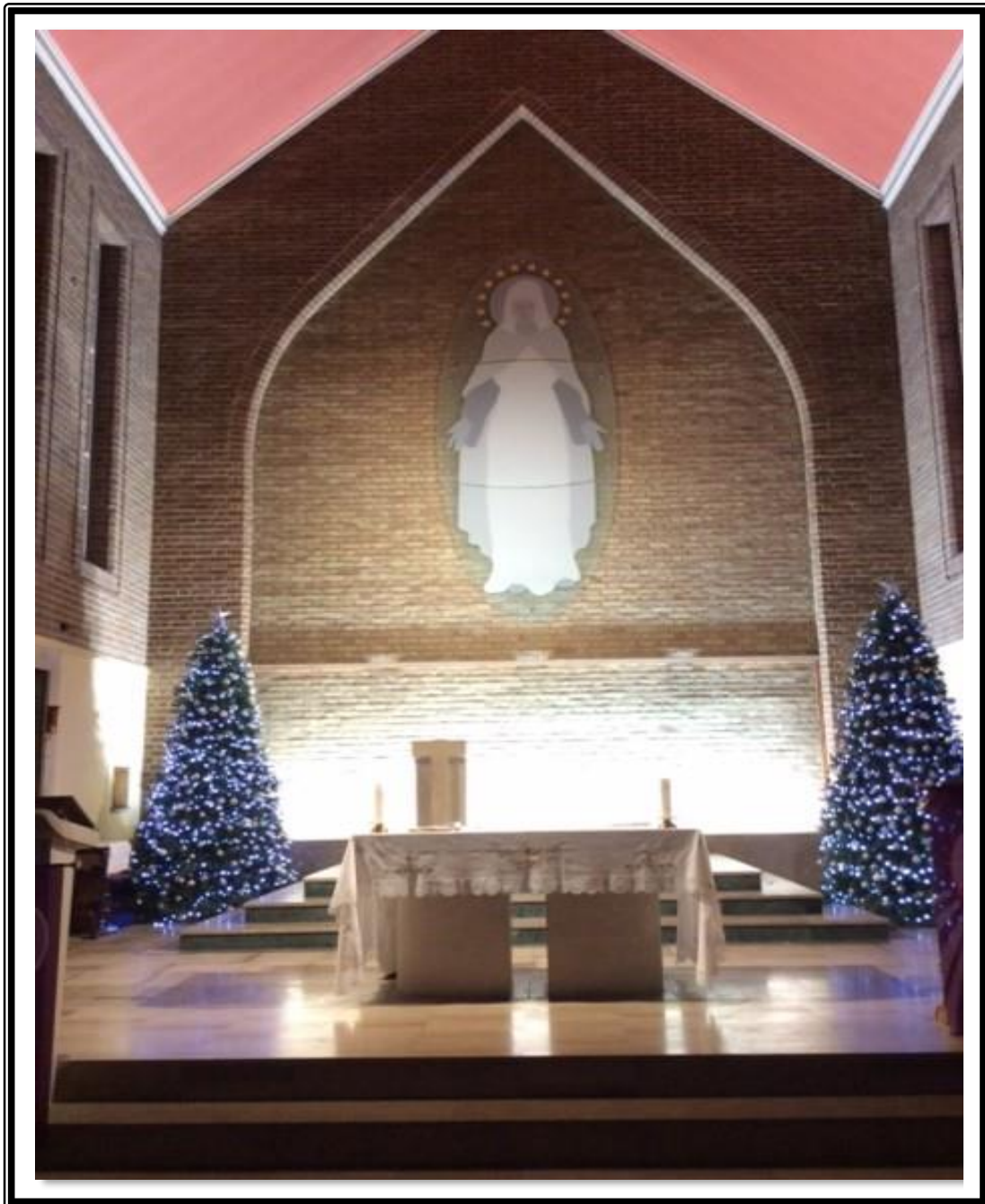


**IMMACULATE CONCEPTION PORTSWOOD CHURCH FUNDRAISING  
STRATEGY**

**2019-2024**

**A SHARED RESPONSIBILITY FOR THE GREATER GLORY OF GOD**



## **SUMMARY OF RECOMMENDATIONS FROM THE FUNDRAISING TASK GROUP**

### **1. Recommendation for the parish charity:**

- a. The fundraising task group is supportive of the decision to temporarily stop the scheme for having a parish charity. However, this decision regarding the parish charity must be reviewed by the Parish Council once the loan has been paid back or upon evaluation and review of the parish fundraising strategy in 2024. (See note on parish open meeting and parish council outcome)

### **2. Recommendations for standing orders**

- a. Standing order system to be set up by finance as soon as possible specifically for the Building Fund.
- b. Once a month finance Team to set up a desk at the back of the church, or in the hall, encouraging people to sign up ensuring the relevant paper work and information is made available. In particular, there should be encouragement of gift aiding.
- c. Regular updates be held provided at least quarterly or biannually.

### **3. Recommendations for mass collections:**

- a. The current collection cycle was discussed by the Taskforce. The group are recommending that the diocesan obligatory, diocesan optional and traditional parish charity collections should remain as currently set. There should be no requests made by the parish to have these stopped or reduced. The only exception to this is if the diocesan 'optionals' are changed by the Dioceses- these can then be reviewed through PPC. Collections on the whole should also be reviewed when the strategy is being updated.
- b. It was acknowledged that having three collections during mass had already been trialled and received negative feedback. However, the Taskforce are recommending that on all Sundays when there is only one collection there should be a second collection for the Building Fund. Parishioners will be informed well in advance when
- c. Holy days and other special feast days- The Taskforce was fully supportive of the Parish Council's initiative for building fund collections being made at all Holy day other special parish masses. (In discussion with the families involved, weddings, baptisms and funerals could also potentially have a retiring collection that would go towards the building fund)

**4. Recommendation regarding legacies**

- a. The welcome pack must include a form setting out information regarding legacies and the importance of legacies for the parish – with examples of how legacies have been used within the parish.
- b. Some wording must be developed and put both on-line and shared with the Parish on what we think is helpful wording for a legacy to the parish to aid people in thinking about their legacies.
- c. Legacies must form part of the parish regular updates on fundraising.

**5. Recommendations for the reserve account**

- a. The taskforce is recommending that part of the reserve account be used for works on the roof. However, the parish should ensure that there is at least £20 000 in the reserve account– of which the emergency fund should be no less than £10 000.
- b. If the Parish does not already have one there should be a clear reserves policy developed which sets out basic guidelines for these funds so that there can be clarity regarding the use of these funds and expectations on the use of these funds can be managed.

**6. Recommendations for community fundraising activities**

- a. Introduce a crowd funding page
- b. Parishioner scheme to sponsor/buy solar panels/bricks

**7. Recommendation for major donors:**

- a. Develop an approach for targeting donors copying from large charities who regularly raise funds from targeted approaches to donors. This should include a list of key individuals and/or organisations that could be targeted through direct approaches or letters seeking donations.

**8. Recommendation for statutory grants**

- a. Identify and make applications to statutory grants for funding for the parish.

**9. Recommendations for companies and gifts in kind**

- a. Through the newsletter IC can seek to engage employees with these schemes and work with them to raise funds.

**10. Other Options –**

- consideration should be given to approach the diocese to fund a proportion of the roof.

- Consideration should also be given to the use of living our Faith fund for the roof
- the parish should develop a ten-year strategy

**Immediate Goal:** To raise £301 427 for the replacement of the immaculate Conception church roof.

**Time Line of fundraising strategy:** 2019 – 2024 (the strategy is to be reviewed in 2024)

## Introduction

For there to be successful fundraising within the parish there must be a commitment and understanding of the need for raising extra funds. Over the past years efforts for fundraising have gone towards a parish charity and in more recent years this has been split for the parish and the year's chosen charity

Early signs of problems with the roof can be traced back to 2002, however, in 2013, a need to replace the church roof was identified and since then there has been a concerted effort to increase the parish income to cover the costs required for the replacement of the roof. It is estimated that the roof replacement could cost in the region of £301 427.

The parish has historically depended on its reserve account which includes a large fund that was left to the parish by Dr Webb of £182 853 of which £150 000 was placed in the investment fund (DOPIF) and the remainder has been used within the parish. See appendix A for examples of items that have been paid using the Webb Fund.

The Webb fund has enabled the parish to support a parish charity and has been used to cover maintenance and refurbishment costs within the parish.

However, a combination of the high dependency on Dr Webb's legacy and as a result of wider economic austerity that has resulted in declining individual giving, the parish finds itself in a position where it now has to make a concerted effort to raise the funds required to enable both the roof replacement and ongoing maintenance costs of the parish.

The parish must now agree a fundraising strategy that will not only enable it to meet these commitments but also ensure the parish remains true to its Christian and catholic mission.

## **Aims of the Immaculate Conception Fundraising Strategy**

The Immaculate conception fundraising strategy has the following aims:

- i. To set out a five-year strategy for raising the funds needed for the replacement of the church roof.
- ii. To develop a strategy that will enable the Parish to meet its obligations towards the diocese.
- iii. To develop a long-term fund-raising strategy that will enable the parish to have steady funds for the ongoing maintenance of the parish.
- iv. To communicate a transparent strategy that will engage and enable parishioners, donors and supporters to feel well connected to the parish's fundraising efforts over the next four years.

## **Background Initiatives already implemented within the parish to raise the funding required for the roof replacement**

Since 2014 the Parish council has already tried and initiated some interventions to increase the funds raised within the parish. These include:

- i. Fundraising group set up in 2014 to spear head fund raising community activities
- ii. Three collections during mass trialled over several weeks over the summer of 2018 but this initiative was stopped as it was felt it was putting too much pressure on parishioners.
- iii. The Parish Council made a decision in 2015 to reduce Parish charity takings to 50% while 50% of remaining funds have gone towards the building fund. In 2018 this was changed to the parish charity receiving 40% of funds raised and 60% remaining as part of the Parish building fund.

The issue of having a parish charity was discussed at length at the two open meetings and points were put forward both in support of having a parish charity and stopping the parish charity until after completion of the roof or having paid back the diocesan loan. The Parish Council voted on this again and upheld the Task group recommendation that 2018 is the last year that the parish will have a parish charity until the loan for the roof has been paid back.

Recommendation 1: The Parish Council voted for the parish to pause the scheme for having a parish charity. However, the decision to not have a parish charity must be reviewed by the Parish Council once the loan has been paid back or upon reviewing of the parish strategy in 2024.

- iv. A drive to increase direct debit sign ups is ongoing.
- v. **The Parish needs to raise £301 427 to replace the roof (note that this is not the final figure, final quotations may vary). The parish has already applied to the Diocese for a loan to help cover the full cost of replacing the roof. £127 600 has been applied for which is expected to be paid for through weekly repayments of £409. It should be noted that this is an interest free loan. However, as the full cost of the roof is still being finalised the amount of loan sought may change once the full costs for replacing the roof are known.**

**We are currently unaware of what the repercussions would be for defaulting on the loan.**

### Potential Sources of funds

The Fundraising Strategy Taskforce considered a number of potential areas for opportunities of raising additional funds for the Building Fund. These are considered in detail below:

#### 1. **Members' giving**

Giving from members of the parish is the most critical form of raising funds for any church. There is therefore a need to have complete commitment to the fundraising strategy by all parishioners. Efforts must be made by the Parish Council to encourage and gain the support of parishioners. Member's contributions are likely to present a large proportion of funds that can be raised and therefore it is important that they understand the reason funds are required. Garnering a common understanding will help to ensure everyone is bound and committed to achieving a common vision and goal.

The Taskforce considered and have put forward a number of recommendations that should be explored to encourage increases in members giving, these are discussed below:

##### i. Direct Debits vs standing orders

The diocese currently manages the direct debit system with little interaction from within our parish. A preferable form of donating to the parish is through standing orders as this is managed by the parish and the parish would be able to closely oversee and manage the system.

##### ii. Building Fund Standing Orders

The Taskforce are proposing the introduction of standing orders to be paid directly for the Building fund. A standing order is an instruction to a bank by an account holder to make regular fixed payments to a particular person or organization.

To set up this up it will require a code to be agreed by the parish and this will be shared with all parishioners so that when they instruct their bank to set up a standing order that has a unique code is used specifically for the Building Fund.

Recommendations for standing orders.

- a. Standing order system to be set up by finance as soon as possible specifically for the Building Fund
  - b. Once a month finance Team to set up a desk at the back of the church or in the hall encouraging people to sign up ensuring the relevant paper work and information is made available.
  - c. Regular updates to be provided at least quarterly or biannually and actively encourage people to set up standing orders.
- iii. Collections during mass

The group considered the current forward plan for annual collections, both the obligatory and voluntary collections. It was agreed that the collections the current collections be left as set out.

Recommendations for mass collections:

- a. The current collection cycle was discussed by the Taskforce. The group are recommending that both the obligatory and voluntary collections should remain as currently set. There should be no requests made by the parish to have these stopped or reduced.
- b. It was acknowledged that having 3 collections during mass had already been trialled and received negative feedback. However, the Taskforce are recommending that on all Sundays where there isn't a second collection then these be used for the building funding.
- c. Holy days - The Taskforce was fully supportive of the Parish Council's initiative for building fund collections being made at all Holy day masses.
- d. Weddings, baptisms and funerals could also potentially have a collection for the building fund but this would be in discussion with the relevant families.

## **2. Legacies**

Legacies, or gifts in people's wills, are a very valuable source of income for many churches. However, the long-term nature of legacy fundraising means that we

cannot know or plan for when a legacy will be received. Therefore, due to the nature of the legacies while they are a welcome source of funding they cannot be relied on.

As a parish we must however, make a concerted effort to offer as much support as we can to make it easier for people to remember the Immaculate Conception church in their legacies. The Task force would like to make the following recommendations regarding legacies:

- a. The welcome pack must include a form setting out information regarding legacies and the importance of legacies for the parish – with examples of how legacies have been used within the parish.
- b. Some wording must be developed and put both on-line and shared with the Parish on what we think is helpful wording for a legacy to the parish to aid people in thinking about their legacies.
- c. Legacies must form part of the parish regular updates on fundraising.

### 3. Reserves

Like many parishes the Immaculate Conception also holds a parish account which By August 2018 had £271 729 in its parish bank account. This includes the following:

Item	Amount
Cash available in accounts	£52 752
Living our Faith	£18 820
Webb Fund residue	£54 397
DOPIF reserves	£145 760
<b>Total</b>	<b>£271 729*</b>

*\* Of this total £61 968 is what we has been collected since 2014 for the roof. Since 31<sup>st</sup> August 2018 the roof fund has increased by £11 739 from community fundraising activities and the second collections. The purpose of the reserve account is to ensure that the parish has access to funds in cases of emergency work needed around the parish.*

Recommendations for the parish account

- a. The taskforce is recommending that the parish should aim to maintain a reserve account of no less than £50 000 as there are a number of additional works that are likely to be needed over the next few years in addition to the roof that have been excluded from the costings for the roof. However, the open meeting discussed having a lower reserve of £20 000. Additional works needed around the church were also discussed for example the presbytery roof is excluded from current roof project and needs replacing, work was valued at £25K - £35K in first tender round. The flat roof of the sacristy is in need of replacing, this would leave an estimate of £10000 as an emergency fund.



b. If the Parish does not already have one there should be a clear reserves policy developed which sets out basic guidelines for these funds so that there can be clarity regarding the use of these funds and expectations on the use of these funds can be managed.

#### 4. Community Fundraising

Over the past four years community fundraising within the parish has strengthened with the setting up of a fundraising group. Regular community fund raising events and activities are now a common feature within the parish. There are currently two main events through the year that raise most of the funding these are the summer fayre and the Christmas fayre – see appendix B for list of annual events held over the past few years within the parish.

The Taskforce discussed additional community fundraising activities that the parish should consider setting up and suggestions are always welcomed.

As part of this review the Taskforce also considered the possibility of introducing a 100 Club and a higher prize raffle however a decision was made not to do this as it could be perceived as supporting gambling.

- a. Recommendation: Crowd funding – through the use of our website introduce a crowd funding page that is available to anyone who access our website.
- b. Recommendation: Introduce a scheme that will enable parishioners to purchase the part of the cost of redoing the roof for example:
  - a. Opportunity to sponsor the total cost of replacing a square foot of the roof.
  - b. Sell the cost of roofing tiles – potentially have parishioners pay for all the roofing tiles.

**5. Major donors** – Accessing and targeting donors can often result in funds being raised for the parish. Currently the parish does not have a strategy on managing and accessing donors. Donors are often targeted to offer prizes for the summer and Christmas fayres. Donors are sometimes sought to support or provide prizes for various raffles held during the year.

Recommendation for major donors:

- a. Develop an approach for targeting donors copying from large charities who regularly raise funds from targeted approaches to donors. This should include a list of key individuals and/or organisations that could be targeted through direct approaches or letters seeking donations.

**6. Statutory grants** (e.g. Local Authority grants) - Statutory grants have often played a role in capital appeals in the past, although local authorities (which are the most common players here) have reduced what they can give, as their budgets have been squeezed.

Recommendation for statutory grants

a. Identify and make applications to statutory grants for funding for the parish.

**7. Company giving and gifts in kind** - Companies sometimes feature in the donor lists of church building appeals although, it should be noted that most companies prefer to give to secular charities rather than religious causes. However, some companies have schemes to match what their employees raise.

**Recommendations for companies and gifts in -kind**

a. Through the newsletter IC can seek to engage employees with these schemes and work with them to raise funds.

**8. Other Opportunities**

Role of the diocese - Further opportunities must be explored with the diocese on potential options for payments for example can the diocese take up part of the costs for roof replacement as they must also be seen to take up some responsibility for the roof.

Living our Faith Fund – The parish has funds raised from Living our Faith Fund. The parish should be provided with up to date information on the fund and consideration should be given to using part of this for the roof. It was agreed at the open meeting to investigate this further.

**Next Steps**

Agree key activities to begin over the coming months that will form the core elements of the Immaculate Conception Fundraising Strategy. Outlined below are the recommendations with named lead team tasked with the responsibility of taking forward the recommendation.

Recommendations	Lead
Setting up standing order system for building fund	Finance team
Setting up and regularly updating direct debits and standing order drive	Finance team
Recommendations for mass collections	Liturgical committee
Legacies	Parish office

Reserve Account	Finance Team
Community Fundraising	Fundraising team/Finance team/
Targeting major donors	Parish office/fund raising
Statutory grants	Volunteers
Companies gifts in kind	Volunteers
Other options	Finance Team

## Key Questions

### 1. How will the strategy be delivered?

The strategy will need the commitment and buy in from all IC parishioners. The Parish Priest and Parish council can not raise the funds in isolation of parishioners. The range of activities outlined in this strategy will need all parishioners to actively be involved and to play a role.

### 2. What role can I play/how can I do my part?

Each recommendation and various activities will need people to deliver them. Your skills can be put to use in various, including supporting the range of community activities, setting up standing orders or direct debits etc. Every must play a role.

### 3. Where can I get more information regarding the events and activities outlined in this strategy?

You can contact any member of the Parish council or the parish office for any additional information regarding the fundraising strategy?

The Webb Fund has been used to pay for a number of maintenance issues around the Parish. Some examples of these are outlined below:

- Church heating - £23,115
- Roof project preparatory work - £9,780
- Hall heating - £6,241
- Asbestos removal - £5,306
- Building manager - £3,787 per year for several years
- Flat roof work - £3,500
- Hall windows - £2,000

## **APPENDIX B: Annual Fundraising events**

The following events have in recent years become annual events and suggestions of new events and volunteers are always welcome.

- Quiz
- Plant sale
- Summer Fayre
- Parish Barbecue
- Cake sale
- International Meal
- Pre Christmas fayre
- Christmas fayre

Additional suggested fundraising events following the Parish open meeting;

- Concerts
- May day events
- Buy lottery tickets
- Have higher stakes quizzes

## **APPENDIX C: Fundraising Task Group Members**

Members of the fundraising task group that attended the meeting to develop this strategy are;

1. Anastasia Lungu-Mulenga (Chair)
2. Chris Gough
3. John Walker
4. Steve Deadman
5. Sue Deadman
6. Sebastian Miyanza
7. Stephanie Churchill
8. David Deadman