**Now please complete a separate Parish PCC form for each parish in the benefice.**

**Financial Action Plan (2023)**

 **for the Benefice of …………………………….**

**in the Deanery of ……………………………….**

Please provide an overview of the situation in your benefice both in terms of challenges on the ground and financial projections. This will complement and provide a bigger picture alongside the parish financial action plan pages. This should be completed by an individual who has oversight or interaction with all or most of the parishes within the benefice, such as the benefice treasurer or incumbent.

1. **Benefice Overview**
2. Please provide a high-level overview of the challenges the benefice is facing, summarised by parish. Generalisations can be made to represent a high-level perspective of the current situation.
3. Please provide a financial overview for the benefice, showing the total financial support requested in 2023

|  |  |
| --- | --- |
| 2023 Share allocation | Total for 2023 £ |
| Year to date share paid | £ |
| Projected share contribution | £ |
| Financial support requested | £ |

Please complete all information requested and return to Julie Podd, Parish Resources Manger by email: julie.podd@cofesuffolk.org with a parish form (pages 2-9 for each parish)

**PARISH PCC**

**2023 Support Request:**

**Financial Action Plan for the Parish of …………………………………………..**

**in the Benefice of …………………………………………………………………………**

(Please complete a form for each parish)

This document has been discussed at PCC on ………………………………….. and has been approved by:

**Name: Signature: Position: Incumbent**

**Name: Signature: Position: Treasurer**

**Name: Signature:**   **Position: C/Warden**

Date:

**Foreword by Bishop Martin**

*God is with us, gathering us as Christ-centred communities, calling us to make Christian disciples, sending us in loving service, empowering us by the Holy Spirit. These are words from our unanimously endorsed diocesan vision and strategy document launched in 2016 and we continue to seek to be shaped by this understanding and inspiration. In the same vision document, I highlighted that part of the challenge for us as a diocese was a “chronic high six-figure operating deficit for the Diocese over several years” and “small historic investment income compared with neighbouring dioceses”.*

*In terms of the deficit, over the years we have streamlined centrally in order to reduce the deficit and before the pandemic approached a near break-even budget. The pandemic created further financial difficulties but through the generosity of many we are again moving year on year towards a break-even budget. However, reaching this goal by 2025 or 2026 depends largely on every benefice and parish meeting its Parish Share payments. Otherwise mission and ministry in other parts of the diocese is immediately and adversely affected and funds to pay for clergy and mission initiatives severely restricted.*

*Consequently, if your parish has a history of not contributing in full, or it is considered likely to struggle to meet its Parish Share request, I would strongly encourage the development of an action plan. This plan would demonstrate how the parish intends to address the challenges it faces, eventually moving towards full payment. Further, it will enable diocesan officers to effectively allocate resources to you in order to assist in identifying and addressing the challenges you face.*

*Completing an action plan has been identified as the most effective way to ensure that each request for financial assistance can be considered fairly and transparently. This is not only important in the interests of fairness, but also in terms of allocating the Contingency Fund the DBF oversees to support requests for financial assistance. This highlights the need for even more robust financial support systems in future.*

*The action plan should be embedded in the context of the wider mission that the PCC/benefice is working towards and be realistic, recognising both the strengths and weaknesses of each parish. Of course, such a plan is not to be considered as an inflexible document but instead as the scaffolding which enables mission, ministry and solid financing to be built upon.*

*Finally, those within your PCC including the incumbent (if in post), churchwarden and treasurer should help to put the action plan together. Following each member signing-off the plan this should then be sent to the Parish Resources Manager –* *Julie Podd**, who will point you in the right direction and continue to work closely with you to allocate resources and diocesan staff as needed.*

*With thanks for our ongoing partnership in the gospel.*

*Bishop Martin*

1. **Mission & Ministry**

|  |  |  |  |
| --- | --- | --- | --- |
| Plan for growth in place? Y/N | Date plan discussed with Phil Dykes | Objectives discussed and agreed | Summarise/Comments |
|  |  |  |  |

1. How will this impact on numbers, missional outreach, and interaction with the community?
2. What are the financial implications (costs and potential income)?
3. Dates to review with Phil Dykes
4. Comments/Actions
5. **Parish Share: Challenges, Targets and Actions**
6. List the main causes for the parish not being able to contribute its full Share. How long has this been the case? Responses can include both long and short-term issues. **Examples are provided below, please edit as appropriate.**

|  |  |
| --- | --- |
| **Challenge** | **Description (include how long)** |
| *“Reduced Attendance”* | *“Our parish has lost a number of very generous givers in the past year, before this time we had a sustainable giving level”* |
| *“Increased Expenditure”* |  |
| *“Low Average Giving”* |  |
| *“Change in Clergy”* |  |
| *“Few regular givers”* |  |
| *“Static giving”* |  |
| *“Church only happens on a Sunday”* |  |
| *“Other issues”* |  |

1. Which aims have been identified to address the challenges currently faced? Please link this to the challenges identified in the previous table. Include what the expected outcome will be and when the actions are expected to commence. **Examples are provided below, please add to, and edit as appropriate.**

|  |  |  |
| --- | --- | --- |
| **Aims** | **Description & Expected Outcome** | **Date of Implementation** |
| *Increase Giving* | *A stewardship campaign will be undertaken to seek to improve giving from existing donors and the wider community.* |  |
| *Appoint new treasurer* | *A new treasurer may be able to get online (QR code) giving up and running which the wider community and visitors may support and use the PGS to increase regular & one off giving* |  |
| *Claim historic gift aid* |  *An easy win if you have not claimed for money off the plate or have a gift aid form available for your generous givers.* |  |
| *Get a contactless donation device* | *Take advantage of regular visitors when the church is open who don’t carry cash and it can be used for events, weddings, baptisms and concerts – increased giving from a wider base than just the congregation* |  |
| *Start a lunch/friendship/playgroup*  | *Chance for church to have an impact in the wider community and potentially increase numbers and in the long-term giving* |  |
| *Approach those in new housing inviting them to attend church* | *Increase congregation and presence in the community.* |  |

1. What steps have been taken to reduce insurance premiums, utility costs, and other ongoing financial commitments? Have you checked out Parish Buying?

**Insurance Premiums:**

**Got 2 quotes at renewal?** Y/N

**Considered excess and sum insured?** Y/N.

**Utilities: Electricity/heating** – looked for fixed/lower cost deals? Give details:

**Office equipment contracts/phones, etc** – checked to see if still good value. Give details:

**Other.** **Give details:**

**Are you signed up to Parish Buying?** Y/N

1. Have you applied for any grants or funding to reduce expenditure and increase outreach? Considered a Friends Group? Give details of all.
2. Has your parish discussed joining the Parish Giving Scheme? Would you like assistance in rolling out the scheme to help maximise donations? Please qualify your response.
3. Are there any areas that you feel diocesan staff could assist with to help you achieve your aims (DAC, generosity and giving, mission, etc)?
4. **Finances**

| **Category** | **2021** | **2022** |
| --- | --- | --- |
| Number on Electoral Roll |  |  |
| Usual Sunday Attendance  |  |  |
| Unrestricted Planned Giving (excluding Gift Aid) |  |  |
| Number of Planned Givers |  |  |
| Total Collections (unrestricted) |  |  |

1. **Historic Payments**

Please detail historic payments made towards Parish Share.

| **Year** | **Share Allocation (£)** | **Share Contribution (£)** | **% Paid** | **Shortfall (£)** | **Shortfall %** |
| --- | --- | --- | --- | --- | --- |
| 2021 |  |  |  |  |  |
| 2022 |  |  |  |  |  |

1. **2023 Parish Share**

Please detail year to date and projected 2023 parish share contributions along with financial support requested.

| **Parish Share** | **Total for year (£)** |
| --- | --- |
| Share Allocation |  |
| Year to Date Share Contribution |  |
| Projected Share Contribution |  |
| Financial Support Requested |  |

1. **PCC Future Commitments**

Please detail how in the following years your parish envisages its financial contribution to parish share - this figure should be realistic but also challenging.

Throughout the duration of the action plan a notable reduction in financial assistance requested should be observed. For some parishes a one-year request for financial assistance may be all that is required, for others it may be that a three-year plan is necessary.

| **Share Allocation\*** | **Target Share Contribution** | **Support Requested** |
| --- | --- | --- |
| Year | £ | £ | % Total | £ | % Total |
| 2024 |  |  |  |  |  |
| 2025 |  |  |  |  |  |
| 2026 |  |  |  |  |  |

**\*** PCCs should assume that share will rise by 3% each year

Should request for financial support be approved for 2023 this does not automatically guarantee support in subsequent years. The reasoning behind this must be considered in the context of the Contingency Fund, which has a limited capacity to provide financial support. Continued financial support will be decided by the Finance Committee on an annual basis, relying upon engagement with diocesan officers, completing the required actions agreed and available funds.

1. **Next Steps**

Following the submission of your action plan to Julie Podd, Parish Resources Manager, the Archdeacon, Finance Director & Deanery Organiser will be notified and you may be invited to a meeting. The financial support request will then be presented to the Finance Committee, after which we will write to you notifying you of the outcome and next steps.

1. **In order to receive financial assistance towards your share you will need to comply with the following (your signatures confirm your agreement):**

|  |  |  |
| --- | --- | --- |
| **Action** | **Date Completed** | **Checked by**  |
| Complete and Implement Financial Action Plan |  |  |
| Attend a finance support meeting at the office |  |  |
| Set a budget and share with the diocesan team |  |  |
| Submit Annual Report & Accounts yearly  |  |  |
| Have a Plan for Growth in place and implement it |  |  |
| Join and promote the Parish Giving Scheme |  |  |
| Set up online giving through GAL (consider contactless devices)  |  |  |
| Check insurance & utilities for cost savings (Parish Buying) |  |  |
| Consider grants by engaging with Giving Advisor |  |  |
| Discuss the Giving Review document at a PCC meeting and report back to diocese |  |  |
| Be willing to have an open relationship with the Diocese |  |  |

1. **Contact/Submit your form**

Julie Podd, Parish Resources Manager by email: Julie.podd@cofesuffolk.org

Support request form/JP/ver2/Sep.23