

The Parish of xxxxxx

Parish Situation Report for meeting with PCC on xxx 2018 at xxx

THIS IS A MOCK UP OF A PARISH SITUATION REPORT

INFORMATION INCLUDED HAS BEEN PREPARED FROM A COMBINATION OF ESTIMATES AND REAL PARISH DATA. THE INFORMATION IN ONE SECTION MAY NOT TIE UP TO THE INFORMATION IN THE NEXT SECTION, WHICH HELPS PROVIDE ANONYMITY FOR PARISHES WHOSE DATA HAS BEEN USED.

WHEN THIS IS PREPARED FOR YOUR OWN PARISH, OF COURSE, IT IS BASED ON YOUR OWN ACCOUNTS AND YOUR OWN RETURNS OF MISSION AND RETURN OF PARISH FINANCE AND WILL TIE TOGETHER AND TO THE CONCLUSIONS AT THE END.

Mrs Stephanie Rankin
Stewardship Resourcing Officer
Making Disciples Team
Diocesan Offices
Clayton House, Walker Office Park
Blackburn BB1 2QE
DD 01254 503273
stephanie.rankin@blackburn.anglican.org

Section 1: *strengths, weaknesses & plans*

This section offers reflection on maintenance, mission and ministry in our church and identifies some key areas for development.

The 3 main strengths in our church “Isn’t it good that...”	
The 3 main weaknesses in our church “Isn’t it a pity that...”	
Our Opportunities “Wouldn’t it be good if ...”	
Our Mission Values What influences and motivates us ...	
Last MAP actions competed Any lessons learnt?	
Last MAP Actions not completed Any lessons learnt?	
Our Purpose Statement Our purpose/reason to be here.	
Our Vision Statement How we would like to be described 5 years from now.	

Our Diocesan Prayer

Heavenly Father, we embrace Your call for us to make disciples, to be witnesses and to grow leaders. Give us the eyes to see Your vision, ears to hear the prompting of Your Spirit, and courage to follow in the footsteps of your Son, our Lord and Saviour Jesus Christ. Amen.

Section 2: *stewardship reflections*

This second section contains some reflections on the stewardship practice and culture of the church which helps to inform our thinking about Giving in Grace and the shape of the programme. Those items in bold in the left-hand column represent the four key tasks identified in the 2009 Giving for Life report produced by the Church of England.

<p>Preaching and teaching</p> <p>We preach regularly about giving and wider issues of stewardship; we offer small group learning opportunities.</p>	
<p>Budgeting for ministry & mission</p> <p>We prepare an annual budget for operational and ministry costs. We communicate it to the congregation, connecting giving to ministry outcomes. We set aside a percentage to mission giving.</p>	
<p>Stewardship practice</p> <p>We address stewardship intentionally, nurture our planned givers and invite an annual review of giving.</p>	
<p>Accountability & appreciation</p> <p>We are transparent and accountable in financial matters and thank our givers annually.</p>	
<p>Pastoral care</p> <p>We offer and/or signpost to training, support and advice for those in financial difficulty.</p>	
<p>Leadership</p> <p>Our clergy and lay leaders are committed to and supported in a stewardship ministry and model generosity. We have structures to facilitate good stewardship practice.</p>	

Section 3a: *income and expenditure*

These charts are based on accounts prepared for the last three years for the General Fund, with some income and expenses netted off to give a simpler picture. The charts only include the unrestricted funds. The aim is to enable a simple view of the main elements of the income and expenditure and the changes year on year.

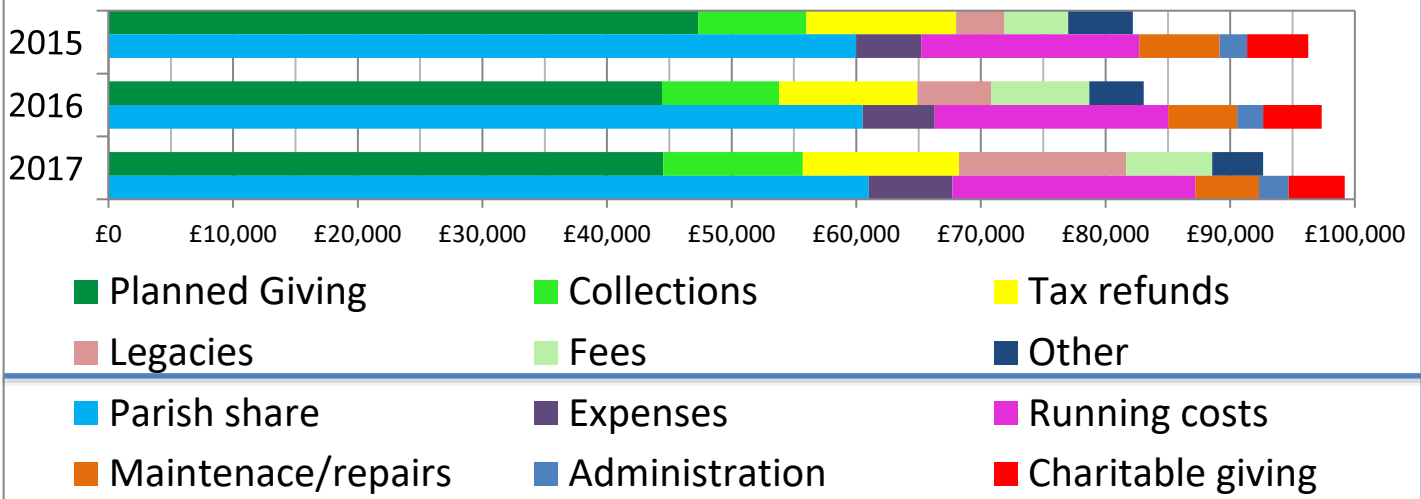
	Income				Expenses		
	2015	2016	2017		2015	2016	2017
Planned Giving	47,300	44,400	44,500	Parish share	60,000	60,500	61,000
Collections	8,700	9,400	11,200	Expenses	5,200	5,800	6,700
Total giving	56,000	53,800	55,700	Running costs	17,500	18,750	19,500
Tax refunds	12,000	11,100	12,550	Maintenance/repairs	6,450	5,500	5,100
Legacies	3,900	5,900	13,400	Administration	2,200	2,100	2,400
Fees	5,100	7,900	6,900	Charitable giving	4,900	4,700	4,500
Other	5,200	4,350	4,100				
Total income	£82,200	£83,050	£92,650	Surplus	£0	£0	£0
Shortfall	£14,050	£14,300	£6,550				

‘Other income’ is made up as follows:

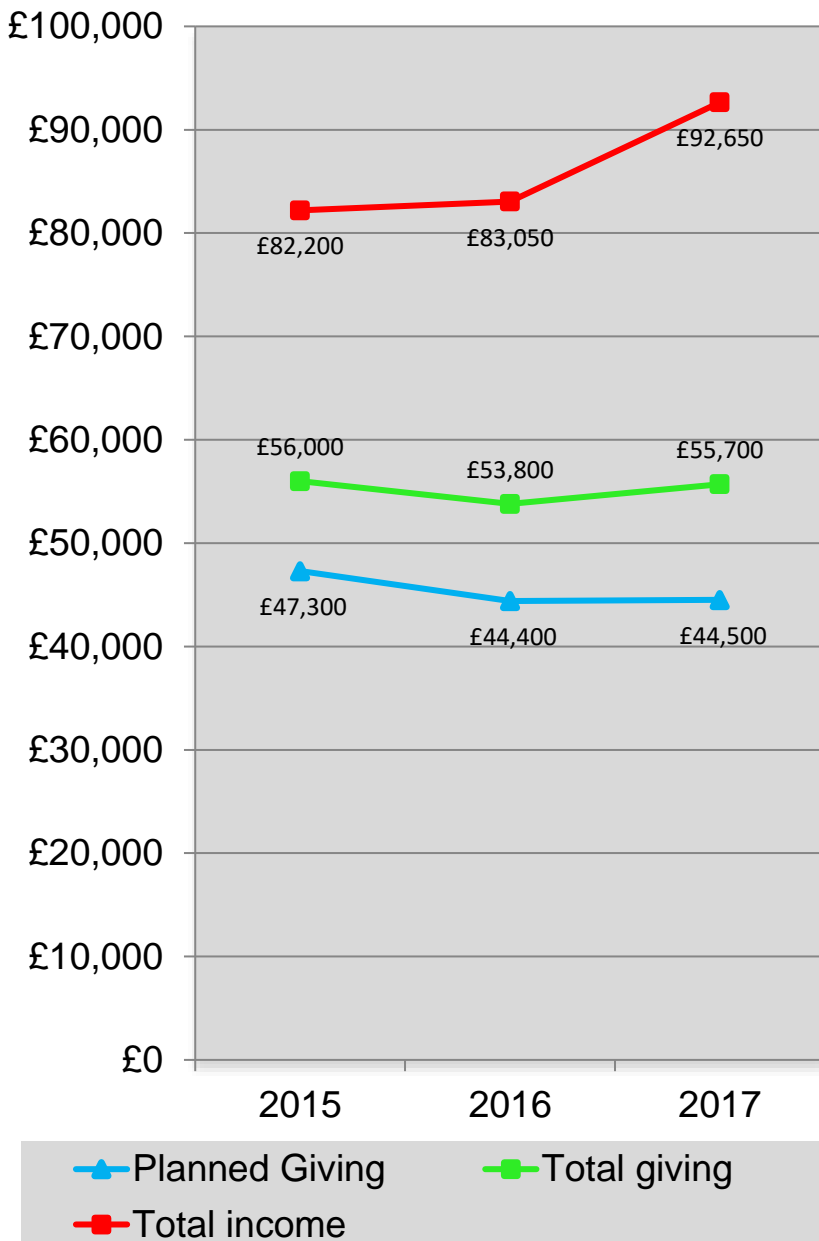
	2015	2016	2017
Hall lettings	100		
Coffee sales	532	719	194
Lunch Club & lunches	1,585	972	1,314
Fundraising & events (net of costs)	1,417	1,259	1,092
100 Club	1,558	1,400	1,500
Dividend & interest	8		
Other income	£5,200	£4,350	£4,100

“Expenses” are clergy and vicarage expenses and the fees for organist/verger.

Income and expenditure



Unrestricted Income



Planned Giving fell from £47,300 in 2015 to £44,400 in 2016 but in 2017 increased very slightly to £44,500 though still below the 2015 figure.

However, over the same period, unplanned giving fell in 2016 and 2017.

In 2016, Total Giving fell by £2,200 to £53,800 but in 2017 it increased to £55,700, though still below the 2015 figure of £56,000.

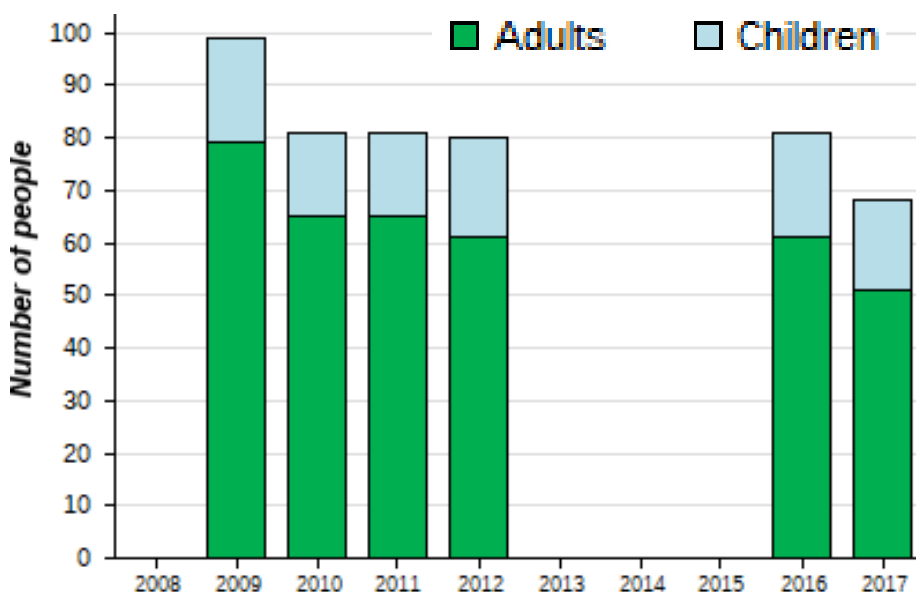
The remaining unrestricted income is mostly made up of tax refunds, fees, donations, and fundraising income

Total (unrestricted) Giving of £55,700 plus tax refunds of £12,550 totalled £68,250 in 2017 and represents 74% of the total unrestricted income of the parish of £92,650.

Section 3b: attendance and giving

Based on figures provided by the parish as their annual returns of mission and finance, Usual Sunday Attendance is shown in the table below and the graph at the right.

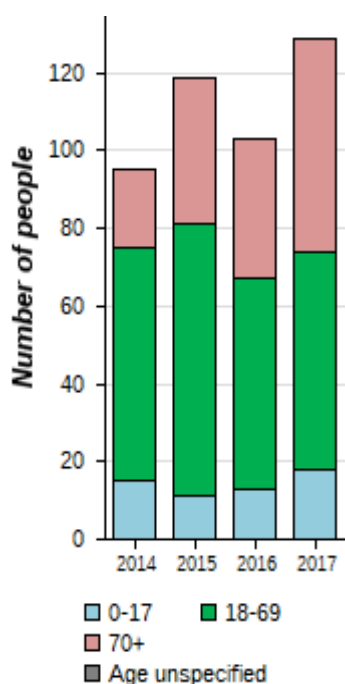
Adult attendance has been falling. It fell from 79 in 2009 to 65 in 2010. It then stayed relatively stable and was 61 in 2016. However, by 2017 it had fallen to 51 in 2017.



Child attendance has been much more stable – and in 2016 was at the same level as 2009, though fell by 3 in 2017 to 17.

In 2017, child attendance at 17 was 1 in 5 of total attendance.

	2009	2010	2011	2012	2013	2014	2015	2016	2017
Adult Usual Sunday Attendance	79	65	65	61				61	51
Child Usual Sunday Attendance	20	16	16	19				20	17
Parish Total	99	81	81	80				81	68



The age profile of the members of the **worshipping community** as included in the Parish Returns is shown on the left and below.

With 110 adults, plus 18 children/young people aged 17 and under, the adults in the worshipping community in 2017 was 129, significantly higher than the average Sunday attendance.

In 2017, about half were 0-69 and the other half over 70.

	2014	2015	2016	2017
0-17	15	11	13	18
18-69	60	70	54	56
70+	20	38	36	55
Worshipping community	95	119	103	129
Joiners	6	6	7	2
Leavers	3	0	7	9

Giving and Parish Income

Planned giving in the parish has also fluctuated in recent years. The table and graph below are based on the number of planned givers included in the annual returns of parish finance and the planned giving included in the accounts.

	2012	2013	2014	2015	2016	2017
Planned Giving	£42,000	£45,000	£50,000	£47,300	£44,400	£44,500
Number of Planned Givers	98	90	96	92	90	88
Average Per Planned Giver Per Week	£8.24	£9.62	£10.02	£9.89	£9.49	£9.72
xxxx Deanery Av per planned giver per week						
Diocesan Av per planned giver per week	£7.23	£7.89	£8.38	£8.22	£8.45	£8.92



The diocesan and deanery figures are shown on the graph on the left and the table above.

The number of planned givers fell in 2013. It increased in 2014 but not back to the 2012 level and has fallen each year until it is now 88.

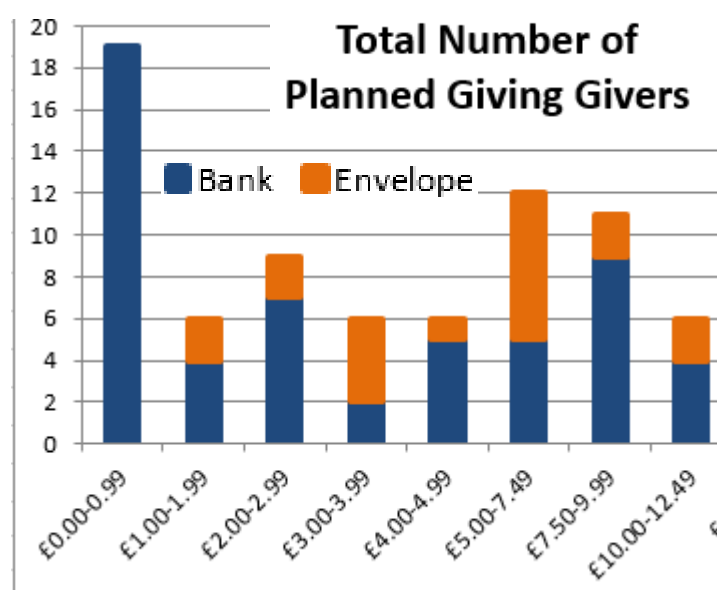
The average per planned giver per week increased in 2014 to £10.02 but then fell again and was £9.72 in 2017.

The following page includes further analysis of planned giving, based on information from the parish.

Section 3c: Parish Giving Analysis

Total Planned giving from Standing Orders & Envelopes in 2017

per Person		Year 2017		
Weekly giving		Overall Planned Giving		
from	to	No. Givers	£ Annual total	Annual % total
£0.00	£0.99	19	642	3.6
£1.00	£1.99	6	370	2.1
£2.00	£2.99	9	1,128	6.3
£3.00	£3.99	6	1,055	5.9
£4.00	£4.99	6	1,435	8.0
£5.00	£7.49	12	4,004	22.4
£7.50	£9.99	11	5,122	28.7
£10.00	£12.49	7	4,085	22.9
£12.50	£12.50+	0	-	0.0
Totals		76	17,841	
Av. TPG		£4.51		
Median giving		£3.46		



The above graph is a summary of the total planned giving in in the year to 30th September 2017, based on data provided by the parish so cannot be tied up precisely to the 2017 accounts. Where giving is from a couple, they are counted as two givers each giving 50% of the total for that couple.

The planned giving profile offers an insight into the pattern of giving in this church. The charts on the page cover all planned givers – both those whose giving is under Gift Aid and those who do not or cannot Gift Aid their gifts.

As envelopes are not always received every week, the total received over the year is divided by 52 to arrive at an equivalent weekly amount. The amounts are based on what is actually given but may be less than people feel they give.

In 2017, out of the 76-people represented by planned giving:

- 4 out of every 9 (34) gave less than £3.00 per week
- The largest number (19) gave less than £1 per week and the next highest (12) gave between £5.00 and £7.50 per week
- Almost ¾ (55) used standing orders and 21 used planned giving envelopes.
- All used Gift Aid.
- The average giving was £4.51 per person per week.
- More than half gave less than £3.46 per week.
- Excluding the 7 who give between £10.00 and £12.49 per person per week, the average giving would be £3.83 per person per week.
- A further £457 was given by members in one off gift aid envelopes, but this is not planned giving so is excluded from the figures above.

£2,016 was given by 142 people who are not attending but using one off envelopes. Though valuable, and indicating support from the community, this has also been excluded from the planned giving analysis to focus on those who attend.

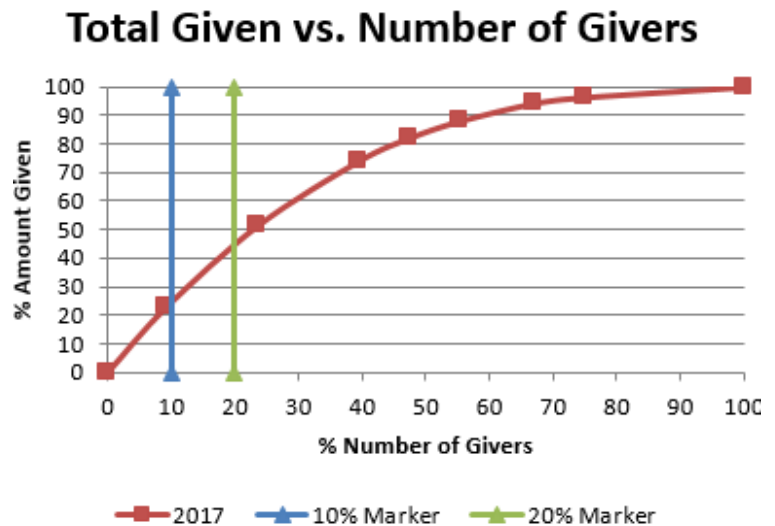
The planned giving of regular givers is almost certainly the single biggest source of church income. Accordingly, understanding and nurturing the growth of planned giving is the primary stewardship task.

It's often said that 'Everyone here is giving all they can'. In truth, in almost every congregation, much of the giving is from the generosity of a few while many give rather less than we or indeed they might think.

In most churches a small number of people give a large proportion of the total giving to the church. This pattern of giving is called skew.

The chart on the right shows to what extent this church is dependent on a small number of givers

- 10% of planned givers (8) give 24.5% of the money given through planned giving
- 20% of planned givers (15) give 44.3% of all that's given through planned giving.



To understand our giving better we need to look deeper. We need to know our dependence on a smaller number of regular givers and to be confident that when asking people to give more we are not asking the impossible. Please don't assume that lower level giving simply reflects income levels. Some people are indeed giving sacrificially but by no means all. In many cases, when asking for greater giving we are not asking the impossible.

Questions

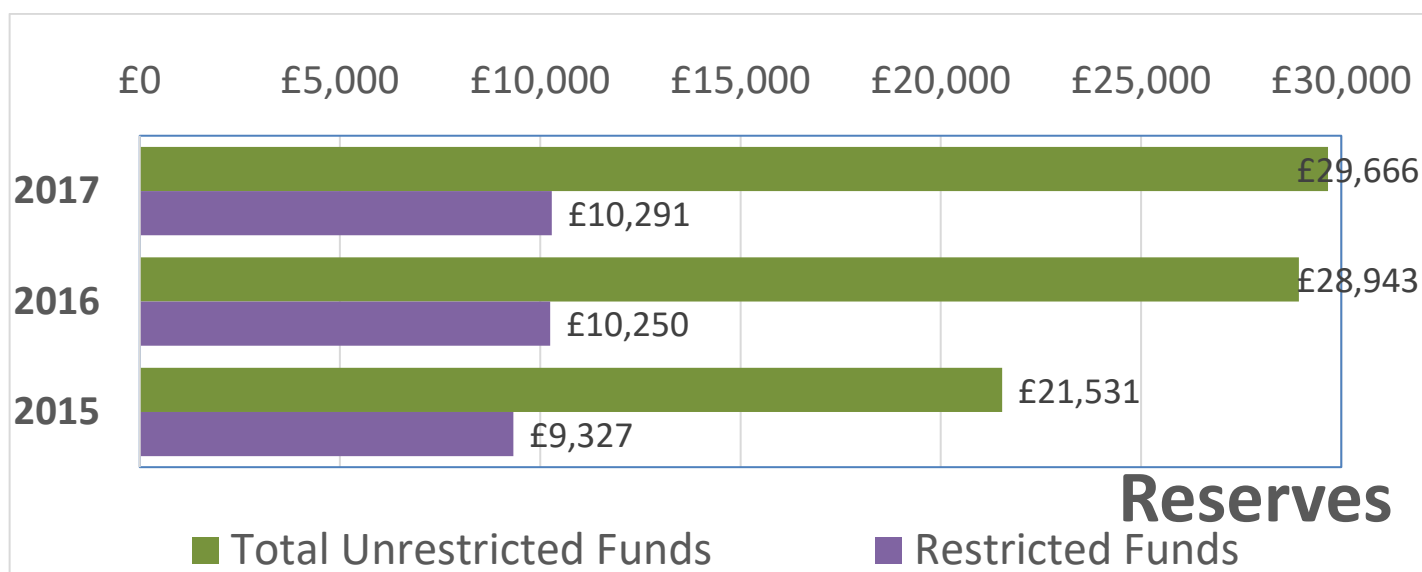
1. What does our giving profile tell us about giving in our church and are there any surprises?
2. We sometimes say that everyone is giving all they can. Does our giving profile suggest this is true?
3. Do we create opportunities for folk to review and renew their giving through an annual review and regular stewardship programmes?

For if the willingness is there, the gift is acceptable according to what one has, not according to what one does not have. (2 Cor 8:12)

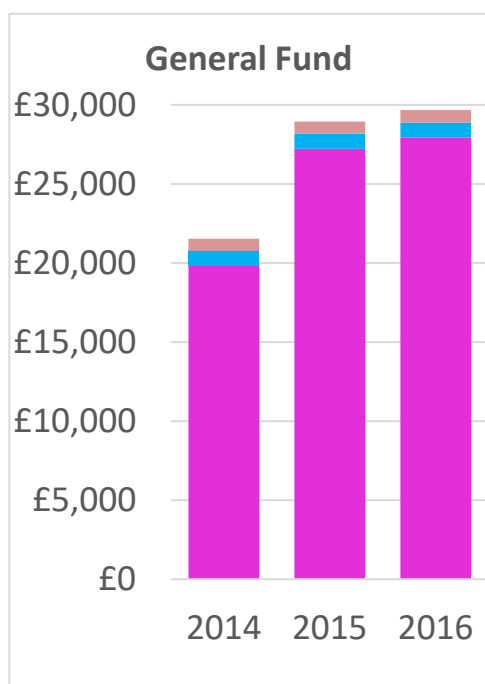
Section 3d: *our level of reserves*

These charts give an overview of what is available to the church by way of reserves which can be used for day to day expenditure on maintenance and the mission of the church excluding investments.

Year	Total Unrestricted Funds	Restricted Funds	Total all funds (£)
2017	£29,666	£10,291	£39,957
2016	£28,943	£10,250	£39,193
2015	£21,531	£9,327	£30,858

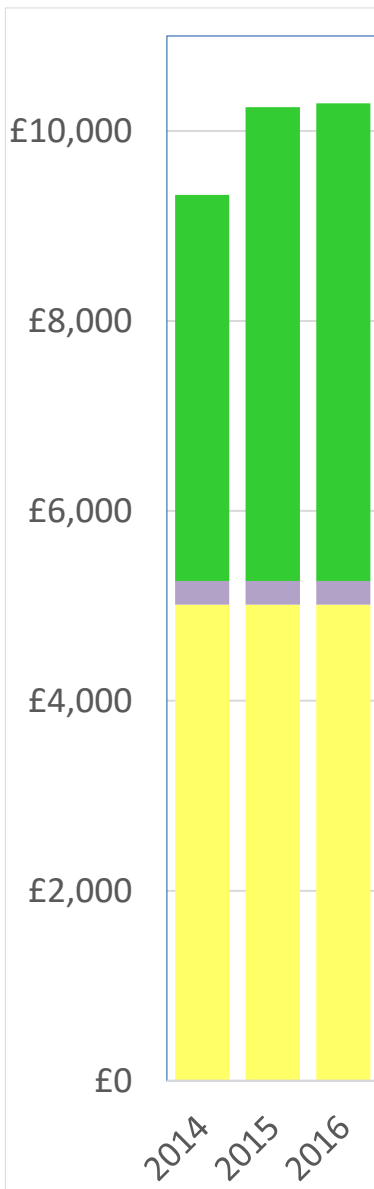


The Unrestricted Fund is made up of the amounts shown below and on the right and the overall balance has been increasing.



	2014	2015	2016
Legacies A/c	768	771	773
Designated Fund	953	957	960
Bank current account	19,810	27,215	27,933
	<u>£21,531</u>	<u>£28,943</u>	<u>£29,666</u>

Restricted funds are shown below



	2014	2015	2016
Organ Fund	5,013	5,013	5,013
Choir Fund	248	248	248
Repair Fund	4,066	4,989	5,030
	£9,327	£10,250	£10,291

Our pattern of income and expenditure and our reserves should provide a sustainable base for effective ministry and mission in the place God has called us to serve.

When God does something new in the Bible, his people respond with financial generosity. The people brought Moses too many gifts for the tent of meeting (Exodus 36:4-7) while David's generosity inspired the generosity of others when building the first temple (1 Chronicles 29:1-9). As Nehemiah rebuilt Jerusalem's walls there was a fresh commitment to sustain the worship of the temple: we will not neglect the house of our God (Nehemiah 10:39).

Our challenge as God's people in the place he has called us is to resource adequately, even abundantly, our church's ministry. Indeed, the generosity of women of means made possible Jesus' own ministry (Luke 8:1-3).

Questions

1. Is there a general trend and how might our finances look in five years if we keep going as we are?
2. Can we explain what we see - any spikes or dips in income and expenditure?
3. Has the church council agreed a reserves policy and told the church what it is - what we should keep in the bank, why, and how we decide what to spend?
4. Is there a group which oversees stewardship for our church?

Section 4: *Financial Conclusions*

The situation we currently face

Based on the amounts included in the accounts, the shortfall in recent years can be broken down as shown below

	2015	2016	2017
Based on adult average attendance	61	61	51
Surplus for year	£5,479	£7,383	£4,133
Weekly surplus for total costs	£105.37	£141.98	£79.48
Weekly surplus per average attender	£1.73	£2.33	£1.56

Every additional £5,000 that the parish needs, is equivalent to a weekly amount of

- £1.89 per adult attender (based on Attendance of 51 in 2017 - see page 6)
- £1.09 per person per week (based on 88 planned givers - see page 7)
- £1.27 per person per week (based on 76 planned givers – see page 8)

From our financial analysis – NB as this is a sample, these will not necessarily be correct based on the data in this sample

Our pattern of income and Expenditure (section 3a) shows	Income is increasing and expenditure is stable. However, planned giving is not increasing.
Our planned giving profile analysis (section 3c) shows	The number of planned givers greater than the average attenders and there is also significant non planned giving (loose cash collections).
Our levels and use of reserves (section 3d) shows	Reserves have been increasing. At £29,666 cash reserves are just over 3 month's expenditures.
Open plate giving (<i>from accounts</i>)	This has been increasing.

Our accounts show our mission giving (grants)	The PCC should look to give away from its own funds each year and not just from special collections taken for that purpose. The PCC is giving away 8% of its income
Do we need to recruit members to our planned giving scheme?	There should be a consistent attempt to recruit members to planned giving and explain that this means regular.
Could or should we promote Giving by Standing Order?	Anyone who is new to the church should be encouraged to join and use standing orders.
Are we making the most of Gift Aid?	New givers should be encouraged to Gift Aid their giving.
Are we geared up for the Small Donations Scheme?	Procedures should be followed.

How do I know if I'm giving generously?

- When I look at my giving in relation to my income, is the percentage I'm giving away realistic?
- Does my giving in all its forms have an impact on my lifestyle? Can I identify an element of sacrifice to my giving?
- Is my giving a priority from what I receive each week or each month, rather than what's left over?
- If what I give away was given back to me, would it make a real difference to me? Would I notice?



Six Steps in Christian Giving as we grow as disciples

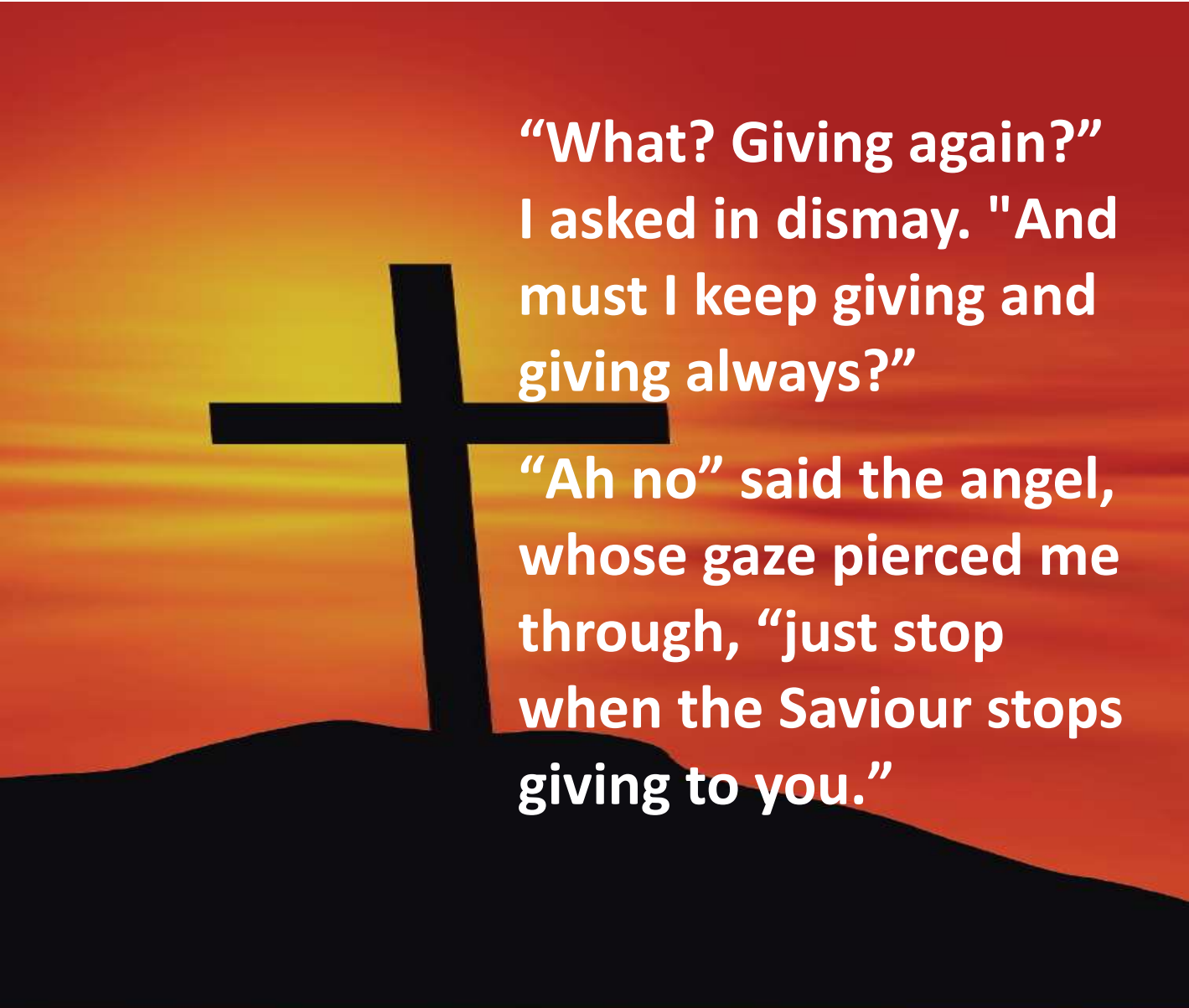


Sacrifice	I am called to be Christ like and do my best to act accordingly
Submission	I am trying to live as a disciple with all that that involves
Subscription	I see myself as a member paying my dues
Support	The church is important, and I will give it my support
Supermarket	I pay for the bits I enjoy and find meaningful
Survival	I do my bit when I am asked to help

As we grow as disciples we should see ourselves growing in our stewardship of all that we have and all that we are, giving generously of our time, talents and money to the cause of Christ, and so excelling in the grace of giving as the first Christians in the church in Corinth.

Section 5: Pointers to Action

<p>Do you have a clear statement of the church's mission and vision, and have you shared it with the wider congregation?</p>	<input type="checkbox"/> We don't have one <input type="checkbox"/> We have one but have not shared it effectively <input type="checkbox"/> We have one and it's well-known	<p><i>People give more generously where there is a clear vision – it helps to stimulate enthusiasm and joy in giving. If you don't have a plan or vision, writing one should be your first priority.</i></p>
<p>How frequently do you include financial issues as part of your ongoing teaching on discipleship?</p>	<input type="checkbox"/> Never <input type="checkbox"/> Seldom <input type="checkbox"/> Sometimes <input type="checkbox"/> Often	<p><i>With 2300 Bible verses on money, wealth and possessions, and a third of Jesus' parables about these topics, there is plenty of opportunity to include this in the regular diet of preaching.</i></p>
<p>When did you last provide principles to guide Church members in their giving of money to the church?</p>	<input type="checkbox"/> Never <input type="checkbox"/> Some time ago <input type="checkbox"/> Within the last 12 months <input type="checkbox"/> Always available	<p><i>If the Church doesn't provide an alternative perspective on giving, then church members' view of giving and generosity will be shaped by secular charities</i></p>
<p>Do church members understand the link between their giving and mission and ministry?</p>	<input type="checkbox"/> Probably not <input type="checkbox"/> Don't know <input type="checkbox"/> A few do <input type="checkbox"/> Most members do	<p><i>Helping people see the connection between their giving and the Church's provision of ministry and mission the church is vital</i></p>
<p>How do you give away money to other Christian causes and Charities?</p>	<input type="checkbox"/> We don't give away <input type="checkbox"/> Only via special collections <input type="checkbox"/> We have a policy of giving a percentage of income away	<p><i>Nationally, parishes give away £46m; more than is raised by the BBC's Children in Need appeal. A policy for giving money away both models generosity</i></p>
<p>Do you have a policy for how the Church would use legacy gifts?</p>	<input type="checkbox"/> No <input type="checkbox"/> An informal one <input type="checkbox"/> Yes <input type="checkbox"/> Yes, it's publicised in the church	<p><i>A simple well communicated policy removes the main barrier to people leaving gifts to the church in their will, that they don't know how the church will use the money they leave.</i></p>
<p>Do your givers receive a personal "thank you" regularly?</p>	<input type="checkbox"/> Never <input type="checkbox"/> Hardly ever <input type="checkbox"/> Some years <input type="checkbox"/> Every year	<p><i>Saying thank you values the donor, is good stewardship and is an opportunity to link giving with achievements in the past year</i></p>



**“What? Giving again?”
I asked in dismay. "And
must I keep giving and
giving always?”**

**“Ah no” said the angel,
whose gaze pierced me
through, “just stop
when the Saviour stops
giving to you.”**



Yours, Lord, is the greatness, the power,
the glory, the splendour, and the majesty;
for everything in heaven and on earth is yours.

All things come from you,
and of your own do we give you.

