



# Communication

## Additional information

### Introduction

As response forms are returned a number will make specific requests for more information on Gift Aid, standing orders, planned giving envelopes and leaving a legacy to the church. How these requests are managed says something about the value the church places on the personal response and also the trustworthiness of the church in financial matters. More than that, each of these information requests is above all a pastoral opportunity. It is not simply a chance to increase the income stream but a gilt edged opportunity to integrate money and discipleship, to build good personal relationships and to assist them on their journey of faith. Don't blow the opportunity by poor administration, an over emphasis upon finance or, critically, a response that lacks the personal touch.

### Personal follow up

As far as humanly possible churches should set out to personally visit each and every person who asks for further information. See the web page [The Value of Planned Giving](#) for some background thinking. The response to requests for information is a key element in the follow up strategy. It values people and their response so make sure the entire follow up strategy is robust and thought through.

- Get together a small team of visitors to respond to the requests for more information. Choose people for lay visiting teams who are reliable and approachable and have the sense of urgency to get the job done and done well.
- The visit to an individual should be within three weeks of receiving his or her response form and be in addition to the sending of thank you letter.
- The visit offers thanks and appreciation and builds personal relationships as well as providing

the information requested. It most definitely does not ask for an increased financial response.

- Make use of the supporting literature which functions as an aid to conversation and offers important information. Simple brochures explain the principles and practicalities behind giving through weekly envelopes, standing orders and Gift Aid.

### Mistakes to avoid

Ensure that record keeping and administration is meticulous. Mistakes made here will cost - and not just financially. People do not take kindly to sloppy pastoral care and administration especially in the area of money.

- Don't confuse saying "thank you" with responding to requests. Get the thank you letter sent out within a week of receiving the response form; it will state that someone will be calling with further information that has been requested.
- Avoid at all costs the temptation to get the job done by distributing new envelopes or Gift Aid Declarations at the church door as people leave. This puts all the emphasis upon the response mechanism - this is how we can get your money. The emphasis needs to be upon the giver - upon appreciation, how their gift makes ministry possible and the value of personal relationships. This is not achieved by a rushed encounter at the church door.
- Absolutely resist the temptation to enclose Gift Aid Declarations or Standing Order forms with the letters of thanks. This is very bad practice; it misses out on the potential for building relationships but above all devalues the clarity of a simple thank you for the gift. Follow up can be done in church through a discussion over coffee after the service but only if appropriate time is available. You do not know the personal story that might lie behind the response. It

may or may not be shared but if time is not allowed then the possibility is closed off.

### Planned giving and commitment

The stress here on a one to one, personal visit in following up requests is underlined in a recent report, *Redefining Commitment*, by Professor Adrian Sargeant and Elaine Jay. Until fairly recently it has been reasonable to assume that donor movements from one off gifts to regular donations, or signing a covenant or Gift Aid declaration or a standing order form represented an increasing commitment to the charitable cause. However, both changes in fundraising techniques and the sophistication of banking challenge this easy correlation of the type of giving and individual commitment. The authors quote research suggesting that 30% of those recruited face to face planned to give for a year or less.

But what Sargeant and Jay did find was that when the decision was made to give, that the first twelve months were the most important and fertile period in which the charity could build a stronger, more lasting relationship with the donor. That is why it is so important that when a church member decides to take envelopes, give by standing order or gift aid their giving there should be a personal visit to meet that request. The request is not primarily a transaction around a financial mechanism for giving but an opportunity to build relationships and make connections between the giver and the ministry of their church. The task is to build that identification of giving and ministry and to answer questions about the chosen form of giving (e.g. do I have to stop Gift Aiding when I retire?). These are crucial elements in forming patterns of informed and committed giving which can grow and mature with discipleship.

### Organise follow up training

The value and significance of a personal visit in follow up is matched only by the anxiety levels of parish visitors! Such anxieties will be put at ease by a simple training session. The visit may involve assisting people in completing a Gift Aid declaration or a standing order form. This is easy to do but visitors will need some support in becoming familiar with the process and comfortable in assisting others. For advice on running a training or briefing session see [Follow up Visitor Training](#). It is important to establish the follow up visiting team and run the training before the Giving in Grace programme is launched in the church. There will not be time to prepare visitors and make visits once the programme has begun.

