

Further help...

There is plenty of further help available.

There are two websites which aim to resource the Church in this area:

- **www.churchlegacy.org.uk** is aimed at individuals and seeks to guide them through the process of making a will and considering whether to leave a gift to the church. It also offers helpful information for solicitors.
- **www.parishresources.org.uk** provides resources for parishes – sample magazine articles, leaflets and so on.

The Church Legacy and Wills Information Line can be used by parishes and individuals to order packs of information but it is there to help much more broadly too. If a parish has received a legacy and has questions about what needs to be done, or if you are seeking to respond to a question asked by a parishioner, you can call the Legacy Line for help and advice on 08445 870875.

Your Diocesan Stewardship Adviser will also be able to help you plan your strategy, integrate legacies into the wider stewardship context, and provide other help and support.



For more information, call the Church Legacy and Wills Information Line on 08445 870875 or visit www.churchlegacy.org.uk

A Short Guide to Encouraging Giving through Legacies



Practical steps for parishes

Introduction

Each year around 5,000 people leave a gift in their wills to a Church of England parish. In total, parishes receive over £50 million each year – money to finance mission projects, maintain beautiful church buildings, or enable some other aspect of church life. These gifts make a real difference to the future work of the Church – as regular giving is often consumed maintaining the existing mission and ministry.



Many church members would like to know how they can leave a gift to the Church, although they might be reticent about asking. This booklet provides a short guide to some of the practical steps parishes can take to enable this, and one or two things to avoid.

Above all, legacy giving should be seen as a natural part of Christian stewardship – which simply means how we manage the resources, wealth and possessions that have been entrusted to us.



Some pitfalls to avoid...

The combination of death and money has the potential to create offence if the topic is promoted too strongly. You should aim for a low-key strategy but make sure that resources are always or frequently available. Encourage church members to see giving through wills as a natural part of stewardship.

The subject should seldom, if ever, be raised with individuals. The one exception is where clergy might discuss will-making as part of their pastoral care of those in the final stages of life, but the emphasis there is solely on encouraging an individual to make a will as a basic act of human stewardship; there must be no suggestion that the church is seeking a gift in the will. Clergy have been encouraged to promote will-making since at least the time of the Book of Common Prayer, which refers to this duty in the preface to the visitation of the sick.

Finally, parishes are encouraged not to seek 'pledges' or indications from individuals that they are planning to leave a gift to the church in their will. Whilst many larger charities do this, the close-knit nature of a church community means that confidentiality is not always maintained. The information is of little practical use anyway as the donor may change their mind at a later date. However, if individuals volunteer that they have left a gift in their will to the church, an appropriate person might have a conversation with them to understand whether they would like the gift to be used for a particular purpose, especially if the gift is an unrestricted one.



Consider promoting Will Aid or some other encouragement to willmaking

As well as encouraging church members to make or review their wills, it can be a good idea to publicise ways to help them do so. For example, the Will Aid scheme allows people each November to make a will at one of a wide range of participating solicitors. These solicitors donate their time to support the Will Aid charities, and instead of paying them a fee, people are invited to make a donation to one of nine Will Aid charities.

You can promote Will Aid very simply (if not every year, perhaps every other year or every third year) by getting free literature or posters from Will Aid and making them available in your church. More information is available at www.willaid.org.uk

If you want to advertise local solicitors who are willing to write wills, you must ensure that you give the names of at least three solicitors. Under the code of practice, this avoids the appearance of promoting a particular firm. You can also point people to The Law Society's website (www.lawsociety.org.uk) which offers a searchable directory of solicitors and advice on what to expect.



Encourage your PCC to make a policy and communicate it

The single most important step a parish can take is to make a simple policy, and share it with church members. An example of such a policy might be:

St Agatha's welcomes gifts in wills, however large or small. We promise to use such gifts to make a difference to the work of the church (eg by funding development projects in the parish, whether buildings, equipment or staff). We will consult with the executors to identify the sorts of projects the donor would have liked.

You can read other example policies on www.churchlegacy.org.uk. A policy has a number of benefits:

- It states that legacy gifts are welcome, which in itself can trigger some to consider leaving a gift to the parish.
- It gives confidence that the gift will be used to achieve something significant. When donors give money, they often want to ensure the gift will fund something of lasting value. This is all the more important to donors considering their final gifts. This policy clearly states that legacies will be used for development projects rather than regular spending.
- It seeks to avoid gifts which are unnecessarily restricted. The policy doesn't prevent donors stipulating how the money should be spent, but it is good to avoid restricted legacies as often the gift will not be received for some time and urgent needs now may no longer be relevant then.



Make literature available regularly

It is good practice to make available gentle, awareness-building literature at regular intervals. People only consider rewriting their wills every few years so at any one time, only a proportion of the congregation will be interested in the subject. So having material available routinely, perhaps with periodic reinforcement such as a poster or a short article in the parish magazine, is helpful.

Your diocese may offer you some legacy leaflets from time to time or you can order some through the Parish Resources website (www.parishresources.org.uk/legacies). Developing your own leaflets can be an alternative. There is a template available on the website in the leaflets section to help you do this.



Link with regular giving by putting a box on a review form

Stewardship encompasses what we do with all that God has entrusted to us – including decisions on spending and saving. It is most often used to relate to giving, and it covers both regular giving, and one-off gifts from what we have accumulated. These one-off gifts might be in response to a particular need or opportunity during our lives, or they might be through our will on our death.

As discussed earlier, wills are reviewed periodically, and the PCC needs to identify a method of drip-feeding resources to church members at a time when they would like to receive it. Adding an extra check-box to allow members to request further information on leaving a gift to the church in their will is a low key way of providing this, and also reinforces the link with Christian stewardship.

St Agur's, Ambridge
Annual Giving Response Form

I know that my regular giving is crucial to enable our church to carry out its mission and ministry. With prayer and thought, I have reviewed the amount I give and my other responsibilities. I have decided to give £..... each week / month (delete as appropriate) until further notice.

(If you are changing the amount you give and you want to give by standing order – the easiest way for our church and you!): I have completed the Standing Order form and sent it to my bank.

(For envelope givers): I would like a set of offering envelopes.

I have completed the Gift Aid form (increasing my gift by an additional 25% at no further cost to me or our church) OR

Please note that I am no longer a tax-payer, and so Gift Aid can no longer be claimed on my giving.

I would like some free information about how I could leave a gift to our church in my will, to help me understand how legacies fit into Christian stewardship and what a difference my gift could make.

I would like to find out more about the different ways I could give my time and talents to St Agur's.

From:

You are welcome to speak to Margery, our giving officer, in confidence if you have any questions about this form: phone 01234 567890 or email Margery@stagurs.org.uk.

It is suggested that you are clear on what you will provide to church members who request such further information. Options might include:

- a simple leaflet. You can order these from the Parish Resources website (www.parishresources.org.uk/legacies)
- a pack of further information. Either the individual or the parish can order a pack of further information from the Church Legacy and Wills Information Line, 08445 870875, or by emailing pack@churchlegacy.org.uk