

# Gold challenge

Fundraising pack



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## About the service

The Citizens Advice service is the UK's largest advice provider. We are equipped to deal with any issue, from anyone, spanning debt and employment to housing and immigration plus everything in between.

The Citizens Advice service is made up of our 394 Citizens Advice Bureaux located across England and Wales, all of which are registered charities, and Citizens Advice, also a registered charity. Citizens Advice is the membership organisation for bureaux. The service offers information and advice through face-to-face, phone and email services, as well as online via Adviceguide.org.uk to help people resolve their problems. Between them, our bureaux make face-to-face advice available from over 3,500 locations across England and Wales.\* Between 2009 and 2010, we helped 2.1 million people with 7.1 million problems. We also use clients' stories anonymously to campaign for policy changes that benefit the population as a whole. Of the 28,500 people who work for the service, 21,500 of them are volunteers.\* Through the training, information systems and operational support it provides, Citizens Advice equips bureaux to deliver the highest quality advice to their local residents. (\* Figures correct at 1 April 2010 )

### Why choose Citizens Advice

The current turbulent economic climate has seen many more people seeking help from the Citizens Advice service with many of these clients coming from increasingly varied strands of society. We plan on making the future Citizens Advice service as accessible as possible to those that need its help, no matter who they are. We are embarking on plans that will see us improving access to our advice. Getting the right advice to people at the right time is crucial and has immeasurable value to both the individual and their community. Support from people like you will go a long way in helping the service and its volunteers to continue to offer this vital lifeline to those facing difficulties and will help us turn even more lives around.



The CAB service helped Chris save his house from being repossessed when he was made redundant.

"My greatest fear was that my house would be repossessed and I would lose my dog - she's all I've got. I couldn't have asked for a better outcome. I really cannot thank CAB enough."

# Fundraising agreement

Once you have registered and been allocated a place in the Gold Challenge you can start preparing for your challenge and fundraising. You can choose to raise money for the service as a whole or for a specific bureau of your choice. Those sponsoring you can choose to donate through various channels including by cheque or online.

We do advise each participant to set up a personalised online fundraising page at the earliest moment and use this as the primary method of fundraising rather than paper-based sponsorship forms as this will allow the money to reach its appropriate destination at the earliest convenience and minimises administration at all levels.

Here are some terms you agree to meet by taking one of our charity fundraising places in this initiative:

1. That you familiarise yourself with the Gold Challenge website and the appropriate sections on our corporate site and/or CABlink as there is useful information relating to training, preparation, fundraising and logistics contained there for your use.
2. That you only use lawful means to fundraise and must not do anything which harms or is likely to harm the reputation of the CAB service or its constituent charities (including bureaux).
3. That you agree to comply with the following financial procedures:
  - cash donations to go to the general service (and not a specific bureau) should be sent by cheque for the total amount and should be marked for the attention of Rachel Morrison (and sent to the Myddelton House office) and made payable to 'Citizens Advice' (donations by cheque to go to a specific bureau should be made payable to that bureau and sent to that specific bureau)
  - it will be up to the individual or team as to when they complete their 'challenge' but all pledged money should be collected and received either by the central fundraising team or by the appropriate bureau by six weeks after the challenge has been completed or by 31 January 2013 (whichever is earliest)
  - to return to us (for auditing purposes) the paper sponsorship form (if used) to the central fundraising team
  - to encourage sponsors to complete the sponsorship form in full or the relevant Gift Aid section on the VirginMoneyGiving website in full so that the charity can recover Gift Aid.
4. That you agree to meet the appropriate fundraising pledge depending on your level of challenge as set out by Gold Challenge: [www.goldchallenge.org/fundraising](http://www.goldchallenge.org/fundraising).
5. That you use the appropriate template (that can be found on the appropriate page of the corporate website and/or CABlink) around marketing/promotion and sponsorship collection where possible.
6. When you ask for sponsorship, you will make it clear that the money is for charity and will not be refunded if the event does not take place or if you do not take part in it or fail to complete it.

# Logo guidelines

You are welcome to use our logo on any material you produce to raise sponsorship. We're proud that 97 per cent of the population recognise our logo so please look after how our logo is used.

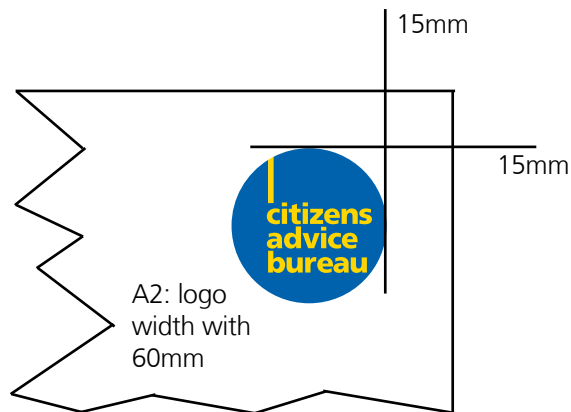
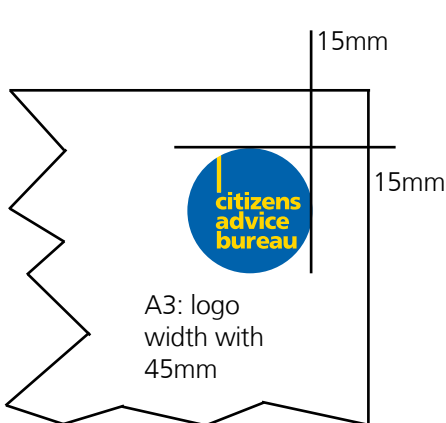
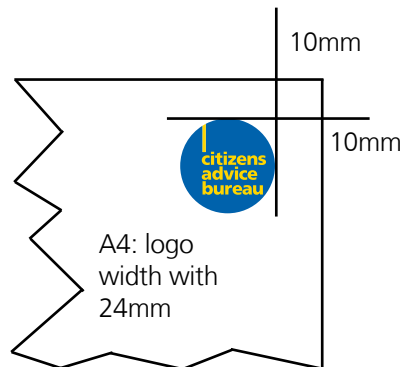
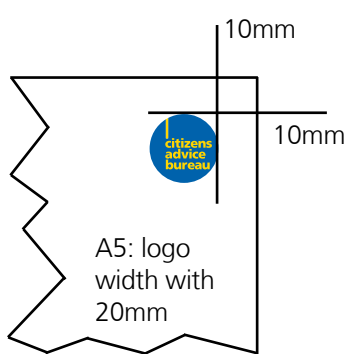
## Colours

CAB logo colours are blue (PMS 293) and yellow (PMS 116)

For one colour printed documents the logo can be printed in black or blue (PMS 293) on a white background or white on a PMS 293 background.

## Size and positioning

Where possible, the logo should be positioned top right of the page. The recommended size and space from the edge of the page are shown below. The logo should never be produced smaller than 15mm.



# Managing sponsorship online

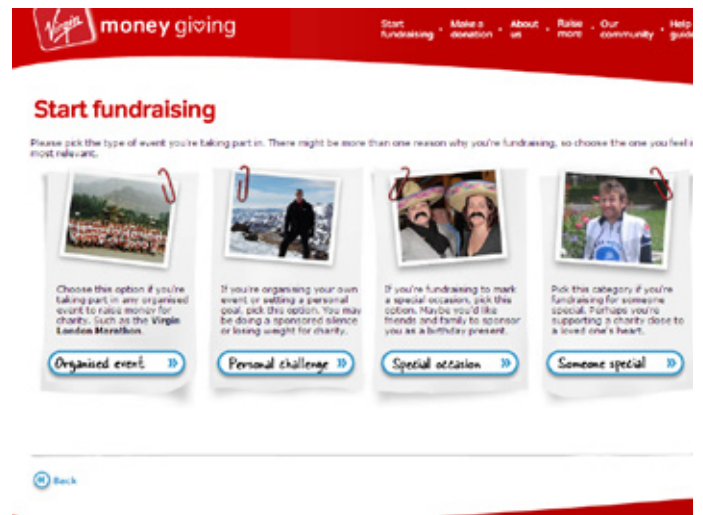
We're encouraging everyone to use the Virgin Money Giving website to manage their sponsorship online. It allows you to create your own customised page enabling you to send a link to family and friends quickly and easily and collect the money automatically so you don't need to chase people.

## How to set up a Virgin money account

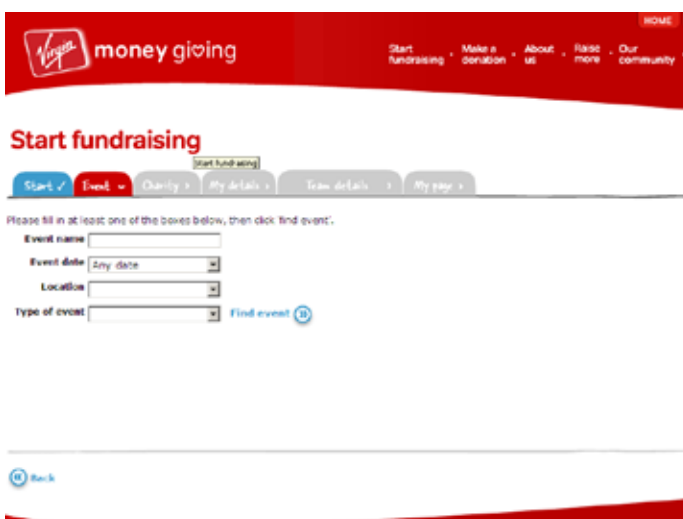
Go to - [uk.virginmoneygiving.com](http://uk.virginmoneygiving.com)



'Create your page' and complete the various pages



Select organised event



Enter the details of the Gold Challenge

Work your way through the set up tabs – Charity (You can choose to raise money for a specific bureau or for the Citizens Advice service generally) / My details / Team details / My page)

Once you've set up your page all you need to do is send out a link to your friends and family to start fundraising!

## Managing your sponsorship on paper

We've included a paper sponsorship form for you. Just print it out and, if you need additional space, photocopy the second page.

### How to ask for sponsorship

Following these basic principles will increase your success rate when you're asking for sponsorship:

- Give people the details – exactly what are you going to be doing, when and where. They will start to picture it in their minds.
- Be clear about who you're raising money for – include a few key facts about what the service and a bureau specifically does.
- Offer them good reasons to give money. What would a world without the Citizens Advice service be like? What will you be going through to earn their sponsorship?
- Make your request relevant to their lives – talk about the bureau in their community and make sure they know we're here for everyone, including them, whatever the problem.
- Promise news and photos after the event so they can share the experience with you.
- If you're asking for sponsorship by email, take a moment to re-read it and make sure it's mistake-free – you want to create the impression it's important to you and not something you would rush.
- Don't be shy! If you don't ask you don't get. And remember, the challenge you are undertaking is worthy of people's sponsorship.



# Gift Aid

## What is it?

Gift Aid is tax relief on money donated to UK charities. It entitles charities to reclaim 20 per cent from HM Revenue & Customs on the gross equivalent of every £1 donated by UK tax payers – its value before tax was deducted at the basic rate. The even better news is that until 2011 the Government will provide charities with 'transitional relief', meaning that the Gift Aid amount received by the charity is equivalent to what it would have been before the basic tax rate was reduced recently. So if a UK tax payer sponsors your £10 the bureau will actually receive £12.80.

## How can I make sure my nominated bureau benefits from it?

It's simple. To qualify for Gift Aid on their donation, a sponsor must:

- declare that they are a UK tax payer on the sponsorship form
- provide their name and home address, including their postcode.

The sponsorship forms we recommend you use are set up to enable bureaux to claim Gift Aid. All you need to do is encourage people to choose the Gift Aid option and reassure them that their name and address won't be used for any other purpose.

Please note that HMRC do not allow Gift Aid claims by individuals that are related by birth or marriage to the person doing the challenge. So for example, your husband/ wife can sponsor you, but Gift Aid cannot be reclaimed on this.

For more details on Gift Aid please see:

**[www.direct.gov.uk](http://www.direct.gov.uk) > Money, tax and benefits > Managing money > Giving money to charity**

# Match giving

Many companies have a match giving scheme, meaning that they will match pound for pound what you raise. In effect you double your sponsorship for very little extra work.

Start by asking your employer if they have a scheme in place. If they do, ask them if they would be willing to match your sponsorship. If they don't, ask them if they would be interested in setting one up. The Charities Aid Foundation can help your employer get started. **See [www.cafonline.org](http://www.cafonline.org) > For companies > Involving employees > Matched giving**

You could also write to local companies to see if they would be willing to sponsor you or match your sponsorship...it never hurts to ask! If there is more than one person raising funds for your nominated bureau, try to co-ordinate your approaches so people don't get bombarded.

Please note: Gift Aid cannot be reclaimed on donations made by companies except where they are sole traders i.e. Smiths Butchers.

# Sponsorship and gift aid form



.....  
 is taking part in the Gold Challenge in aid of

.....  
 Citizens Advice Bureau or Citizens Advice

| Full name | Home address | Postcode |                          | Pledge £s |
|-----------|--------------|----------|--------------------------|-----------|
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|           |              |          | <input type="checkbox"/> |           |

**Gift Aid it** →

**If you pay UK tax and you tick the Gift Aid box on this sheet, the charity will be able to claim an extra 28% from the government. It won't cost you a penny.**  
 Please note: in order for the charity to be able to claim Gift Aid from your donation you should write clearly, provide your full name, address, postcode and not use 'ditto' marks.  
 Thank you.

# Sponsorship and gift aid form



.....  
is taking part in the Gold Challenge in aid of

.....  
Citizens Advice Bureau or Citizens Advice

| Full name | Home address | Postcode |                          | Pledge £s |
|-----------|--------------|----------|--------------------------|-----------|
|           |              |          | <input type="checkbox"/> |           |
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|           |              |          | <input type="checkbox"/> |           |

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*Thank you.*



For more information about the Gold Challenge, please contact [rachel.morrison@citizensadvice.org.uk](mailto:rachel.morrison@citizensadvice.org.uk). More information can be found at [www.goldchallenge.org/morecharities/thecitizensadviceservice](http://www.goldchallenge.org/morecharities/thecitizensadviceservice)

Alternatively, you can also contact the Gold Challenge team 0845 680 7074. Rachel will be contacting you at regular intervals to answer any questions you may have and to check that you are on your way to meeting your sponsorship target.

### **Our principles**

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

### **Our aims**

To provide the advice people need for the problems they face.  
To improve the policies and practices that affect people's lives.

Citizens Advice  
Myddelton House,  
115- 123 Pentonville Road  
London N1 9LZ

Telephone: 020 7833 2181  
Fax: 020 7833 4371

[www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)  
[www.adviceguide.org.uk](http://www.adviceguide.org.uk)

Citizens Advice is an operating name of The National Association of Citizens Advice Bureaux. Registered charity: 279057