



the brain injury association

Headway North Cumbria

www.headwaynorthcumbria.org.uk

HEADWAY NORTH CUMBRIA

HOW TO FUNDRAISE FOR HEADWAY NORTH CUMBRIA

INTRODUCTION

1. As a charity Headway North Cumbria needs to generate income to continue to provide services for its members. Fundraising by the branch itself, or a supporter of the branch, is the means by which a majority of this income is generated.

AIM OF THE INSTRUCTION

2. The aim of this instruction is to provide a guidance on fundraising and, in particular, how to set up an online funding page in support of Headway North Cumbria activities.

HEADWAY'S FUNDRAISING PROTOCOL

3. Headway UK recognises that the more than 100 branches and groups need to generate income to support themselves, but acknowledges that it is not helpful if different parts of the Headway family become involved in disputes over fundraising.

4. To avoid conflict Headway UK has published, as one of its key resources for groups and branches, a Fundraising Protocol¹. The protocol states that groups and branches operate within a specifically defined geographical area and should not fundraise outside their area without consulting the appropriate group or branch. This guidance should be adhered to when planning any fundraising campaign.

ONLINE FUNDRAISING PLATFORMS

5. Online fundraising platforms such as Just Giving (www.justgiving.com) and Virgin Money Giving (<https://uk.virginmoneygiving.com/giving/>) are now a common method by which charities undertake fundraising or individuals undertake sponsored events in order to generate funds for a particular activity or for their chosen charity. A number of individuals have chosen this route in order to raise funds for Headway North Cumbria.

¹ This is available through the Headway UK online Resource Centre:
<https://resourcecentre.headway.org.uk/media/1021/fundraising-protocol-dec-2014.pdf>

SETTING UP A FUNDRAISING PAGE

6. The method by which a fundraising page is set up will vary from platform to platform but will broadly follow the following process:
 - a. Sign up with the chosen fundraising platform to generate an account.
 - b. Decide which charity you wish to raise money for. Some platforms will allow you to choose a number of charities for each event you take part in and you can decide how the money is split between the charities. Most platforms will ask whether you are fundraising for a registered charity and, if yes, will then offer a list of charities to choose from.
 - c. Personalise your fundraising page with a target, a story, some photos and perhaps, a video.
 - d. Advertise your fundraising page with popular tools such as Twitter, Facebook, WhatsApp and email.
 - e. Any donations will be collected along with any Gift Aid securely online and the money sent to the chosen charity/charities on a regular basis (often weekly).

CONSIDERATIONS WHEN FUNDRAISING FOR HEADWAY NORTH CUMBRIA

7. If funding for Headway North Cumbria the following should be considered:
 - a. **Let Us Know that You are Fundraising.** Please discuss with the Secretary or Treasurer so that the Committee can be notified that a fundraising activity is being undertaken.
 - b. **Help With Setting Up the Fundraising Page.** Headway North Cumbria can help with the setting up of a webpage, particularly with regards to providing wording about what the charity does and how funds raised will be used. The branch may also be able to provide photos or video if needed.
 - c. **Choosing a Charity.** When choosing a Charity to support please be aware that there may be multiple different Headway groups listed so it is important to choose the right one if you want the funds raised to get to the right place. Headway North Cumbria will NOT appear since, as a branch, we have the same Registered Charity Number as our parent organisation Headway – the brain injury association (Charity Number 1025852). It is important to select the Headway UK Charity account (check the Registered Charity Number), but it is also important to be clear on your fundraising page

that you are collecting specifically for Headway North Cumbria otherwise it will be assumed that you are collecting for Headway in general.²

d. **Advertising.** Fundraisers will advertise their activities through their own networks by word of mouth, social media and e-mail. Headway North Cumbria can support this by posting an article to its website (www.headwaynorthcumbria.org.uk) and/or through Twitter (@HeadwayNCumbria). This will not happen without the fundraisers permission so it will be necessary to discuss with the branch Secretary who is responsible for both the website and the twitter account.

e. **Handling of Donations.** The fundraising platform will collect any donations that are made through the fundraising page and pass them on to the designated Charity on a regular basis (in the case of Virgin Money Giving this is done on a weekly basis). It should be noted that since funds will be being paid to Headway – the brain injury association and not directly to Headway North Cumbria funds will not be received by the branch until Headway release them - which normally occurs when the fundraising page is closed.

f. **Closure of the Fundraising Page.** Since funds will not be released to the branch until the fundraising is complete it is important to ensure that the fundraising page is closed³. This can be initiated by the fundraiser at a time of his/her choosing once satisfied that no further donations will be received or may be initiated by the platform itself after a certain period of time (i.e. for Virgin Money Giving a page will become inactive three months after the fundraising event has passed).

g. **Collection of Donations by Traditional Means.** Some people are uncomfortable with making charitable donations through online platforms and simply prefer to make a cash donation. Headway North Cumbria can support fundraisers with this by providing a sponsorship form for offline donations. A template is attached to this information sheet, which can be tailored to meet the requirements of the individual fundraiser. Offline donations can either be paid directly to Headway North Cumbria or by processing through the fundraising platform.

² The Headway North Cumbria committee will engage with Headway UK regarding the fundraising efforts and ensure that funds are directed to the correct branch.

³ Once Headway UK is in receipt of the donations it will forward the total funds to the branch. Headway UK will retain 20% of any gift aid recovered to cover administrative costs (Fundraising Protocol)

GIFT AID⁴

8. **What is Gift Aid?** Gift Aid is a scheme that lets UK taxpayers easily supercharge their charity donations by 25p for every £1 donated, at no cost to them. The idea behind it is that when someone makes a donation this is usually from their post-tax income. They give to a Charity who can, if the donor has agreed to Gift Aid, claim back the basic rate of tax (20%) from HM Revenue and Customs. Headway UK needs to do this on behalf of Headway branches (not groups)

9. **How to Claim Gift Aid.** To claim Gift Aid on donations given to Headway North Cumbria, Headway UK will require:

- The donors title, name and address, including postcode,
- A signed declaration that they pay tax in the UK of an amount at least equal to the donation they are making.
- Their signature and date the declaration was made

10. To make the process as easy as possible, Headway UK can provide Branches with Gift Aid envelopes or Gift Aid Declaration Form (example below) that have the legal declaration printed on, as well as the required fields to complete (like name, address etc). These can be used by individuals when making a cash donation, or they can be put out at events for guests to use. These can be obtained through the Network Support Co-ordinator.

11. Once the branch has received the donation and the completed envelope/gift aid declaration it is necessary to keep the envelope/form (or a scanned copy) as per the HMRC rules⁵ (for audit purposes), this is currently 6 years after the claim has been made.

⁴ This section on Gift Aid is based on Headway Guide FN03 – Gift Aid for Branches (England, Scotland & Wales) published in July 2023

⁵ <https://www.gov.uk/claim-gift-aid>

Charity Gift Aid Declaration – single donation

Boost your donation by 25p of Gift Aid for every £1 you donate

Gift Aid is reclaimed by the charity from the tax you pay for the current tax year. Your address is needed to identify you as a current UK taxpayer.

In order to Gift Aid your donation you must tick the box below:

☐ I want to Gift Aid my donation of £_____ to:

Name of Charity _____

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax in the current tax year than the amount of Gift Aid claimed on all my donations it is my responsibility to pay any difference.

My Details

Title _____ First name or initial(s) _____

Surname _____

Full Home address _____

Postcode _____ Date _____

Please notify the charity if you:

- want to cancel this declaration
- change your name or home address
- no longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

12. For Headway UK to claim the Gift Aid from HMRC, on behalf of the branch, it needs a completed spreadsheet with the details of all the donations received (called Gift Aid Schedule). The completed schedule is to be sent to the Network Support Coordinator by email, copied to the fundraising team (fundraising@headway.org.uk) since they will process the HMRC claim:

13. **The Gift Aid Schedule.** The Gift Aid Schedule is the mechanism by which Gift Aid is processed. It has a fixed format that is designed to ensure that the claiming of Gift Aid can be done as smoothly as possible. With this in mind it is important to ensure that the Gift Aid Schedule is completed correctly and accurately. The information requested on the schedule is shown below. It is important all relevant fields are completed, otherwise HMRC can refuse the claim.

Donations schedule table									
Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event (Yes/blank)	Donation date (DD/MM/YY)	Amount
1									
2									
3									
4									
5									
6									
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14. The following guidelines should be noted:

- Don't change the layout of the schedule or change the name of the worksheet.
- Save the schedule as a .ods file not a Microsoft Excel .xlsx file.
- If any section isn't applicable leave it blank. Don't enter N/A or Nil.
- Don't include blank spaces or other characters at the start or end of boxes.
- Don't leave a blank row between donations.
- Enter the house name or number and the postcode of all donors that live in the UK. For donors living abroad, enter their address and put X in the 'Postcode' column.
- Stay within the maximum of 1,000 rows of donations. (i.e. no more than 1000 donations to be claimed at one time).
- Aggregated donations are those that are £20 or less from different people. These can be added together and entered on one line. The total line cannot be higher than £1000. To claim Gift Aid on aggregated donations, you do not

need to enter the name and address of individual donors. You can add a simple description like “Coffee Morning donors” in the aggregated donations box, the date of the last donation and the total amount raised. You can only add together donations that are made in the same accounting period (i.e. to your year-end). Please note, when adding donations together from the same donor, you must leave the aggregated donations column blank and include their full details⁶.

- For sponsored events enter the participant's name and address, the date collected, and the total amount raised. Don't include any donations over £500 as these must be shown separately as you would a normal Gift Aid donation i.e. add the donor on a separate line with their full details.

15. Once Headway UK has processed the Gift Aid claim and received the payment from HMRC, it will send the money directly into the branch's bank account.

SPONSORED ACTIVITY

16. If someone is fundraising for the branch through a sponsored activity, for example a sponsored walk, it is possible to claim Gift Aid on the donations made by the individual sponsors. If collecting online using a Fundraising platform such as JustGiving the platform will offer donors the opportunity to claim Gift Aid and will collect the Gift Aid on the branch's behalf rather than requiring the completion of any spreadsheet or claim by the branch.

17. If taking donations offline these can be done using a Headway UK sponsor form, which includes a tick box for sponsors to select when completing their pledge to confirm they agree they are a UK tax payer. Sponsors will need to complete their full details on the form. The following rules apply to the completion of sponsorship forms sponsor forms:

- Fundraisers/Branches do not fill in the form on behalf of sponsors. Donors must fill in their details for themselves.
- Full names of sponsors are completed (not nicknames).
- Sponsors fill in their full home address. Gift Aid cannot be claimed on work addresses.
- The gift aid box is “ticked” if appropriate.
- Sponsors must complete the form in legible handwriting.

⁶ A claim can be made from day service donations however to qualify, these donations must be from donors who have completed a GA declaration and have donated £20 or less in a claim period (for this example accounting period). If the individual supporters have donated more than £20 in a year, they will need to ensure they have a GA declaration and enter the claim under a separate line as per the process in the guidance and not under the aggregated totals.

18. Once the sponsored event is completed and all monies have been received by the Branch along with the sponsor forms, the branch can then complete the Gift Aid Schedule with the participants name and address, the date collected and the total amount raised. It is not necessary to list out every donor on the form. If there are any donations over £500 from one individual these must not be included and should be dealt with separately. Sponsor forms must be kept (or a scanned copy) for 6 years after the year the claim is made.

19. Copies of the sponsor forms should be sent to the Network Coordinator along with the completed Gift Aid Schedule, copying in fundraising@headway.org.uk. The rules around what can be claimed are a little more complicated for sponsorship. For example, if an individual is undertaking a Skydive and the cost of their place is being taken from the money raised (rather than them paying for it themselves) then Gift Aid cannot be claimed on this amount.



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SPONSORSHIP FORM

Headway North Cumbria is a dedicated local branch of the national charity Headway – the brain injury association.

Brain injury can have devastating consequences for individuals and their families and can affect every aspect of their lives.

Headway North Cumbria is dedicated to assisting those affected by brain injuries to adjust or return to community living, including access to appropriate accommodation, social outlets, and productive activity. In addition to ongoing support, guidance and information, we also provide a range of services in a friendly and welcoming environment including a Day Centre for all members every Monday, frequent outings and events, informative talks, presentations and activity weekends.

PARTICIPANT NAME

ACTIVITY

DATE



SPONSORSHIP FORM

Title	Full name (first name and surname)	Postcode	Home Address (not your work address – this is essential for Gift Aid)	Amount	Gift Aid	Date Collected

Registered Charity Number 1025852



the brain injury association

Title	Full name (first name and surname)	Postcode	Home Address (not your work address – this is essential for Gift Aid)	Amount	Gift Aid	Date Collected

Registered Charity Number 1025852