



Welsh Guards
Charity

Fundraising Pack

GUIDELINES

Before embarking on any fundraising activities for the Welsh Guards Charity please submit a brief note/email to the Regimental Adjutant outlining your plans.

A number of important considerations have been assembled under the following headings.

Check List

Please read these Guidelines carefully

- » Get some friends together to share the work load; allocate responsibilities and tasks; meet when you need to.
- » Decide on a date, allowing you plenty of time to get organised.
- » Work out a detailed budget including how much you plan to raise and the costs that you will likely incur - allow for promotional expenses.
- » Write out a list of all the items you will need, including permits if applicable.
- » Consider all legal, accounting and safety issues.
- » Write a communications plan. Who are your potential sponsors, how are you going to reach them?
- » Lodge your plan with the Regimental Headquarters.
- » Make sure you read the FAQs and prepare your pitch properly i.e. explain carefully what the Charity is about.
- » Don't forget post-event administration - chasing up sponsors to honour their pledges, remitting the money to the Charity, and reporting to us how it went (send in a brief account and pictures for us to publish on the website, in the journal etc)

Read more

Finance

- Your good name and the good name of the Regiment and the success of future events are all at risk if you don't keep proper records of income and legitimate expenses.

Legitimate expenses are any costs incurred in setting up and publicising an event. You should keep a record of all costs you claim against the event – with receipts whenever possible. Personal costs such as insurance, transport or telephone can be claimed but no personal remuneration or other costs. In other words, you cannot pay yourself a fee for organising the event out of the funds raised. If you have any doubts about what expenses you should claim, please err on the side of caution. Remember the aim of the exercise is to raise money for the Charity.

Try to bank all cash you collect on the same day you receive it. If you can't, bank it on the first banking day after the event and meantime keep it safe.

If your sponsors wish to give you a cheque rather than cash, please ask them to make it payable to RHQ....

In the event that a donor would like to give a significant amount of money, please make sure they complete an individual Donor Form and the Gift Aid section. (over) "Once a Grenadier, Always a Grenadier"

Sending money to The Fund

Please pay all money you raise, namely cash and any cheques made out to you, into your bank account and then write just one cheque for the total, payable to the Welsh Guards Charity

Send this cheque and any other(s) made out directly to the Fund, together with the completed Event

Processing Form, by recorded delivery to:

The Regimental Adjutant, RHQ Welsh Guards, Guards, Wellington Barracks Birdcage Walk, London SW1E 6HQ

You should send in the money you have raised no more than six weeks after the completion of your event/activity.

If in doubt about any financial matters, please contact the Regimental Treasurer?

Gift Aid

Please take great care when completing your Sponsorship Form, particularly in respect of the Gift Aid boxes. This enables us to claim back tax on the donations at the basic tax rate i.e. currently 28p for every £1 donated.

To qualify for Gift Aid, your sponsor must have paid Income Tax or Capital Gains Tax in the UK, equal to the amount of tax that will be reclaimed and have completed the sponsor form and ticked the Gift Aid box on the form. For further information, see www.inlandrevenue.gov.uk/charities/gift-aid.htm

It is the responsibility of the sponsor to ensure that they have read and understood the Gift Aid Declaration before ticking the box.

It is your responsibility to ensure the form is completed correctly (Surname + first name/initial, full residential address, postcode **for each individual sponsor**). Make sure you fill in the amount received and the date when you collect the money, confirming the amount that The Fund has actually received.

Please note, Gift Aid cannot be claimed on

- The price paid for anything such as goods from stalls or raffle tickets

- Price paid for entry tickets to attend an event
- If a minimum donation is required to attend an event, this is regarded as an entry fee.
- Connected persons: Gift Aid cannot be claimed back on any donations from people 'connected' to

the participant e.g. spouse, relative, spouse of relative, a company under the control of the donor or under the control of persons who sponsor you in any event.

Legal and Safety Considerations

- It is essential that all fundraising events and activities are run legally and safely. Here are some guidelines:

Legal

You are responsible for ensuring that any event you organise in aid of The Charity complies with relevant laws, rules and regulations and that you have all necessary licences and permissions. The Regimental Charity does not authorise fundraisers to act as agents for the Charity and nor are they responsible for organising, supervising or running your fundraising activities. All activities, and participation in them, are at organisers' and participants' own risk. The Charity does not accept responsibility or liability for any loss or damage to property or for death or personal injury arising out of any fundraising activity relating to an event (except death or personal injury caused by our own negligence).

There are many sources of information and advice on running events and activities – local councils, police, trading standards and The Council for Voluntary Action (check on the web for your local CVA) may be able to offer support, depending on what it is you propose doing.

All fundraising and publicity materials must include the following statements, including emails:

If you wish to involve any companies in an event and they want to use the name of the Regiment for their commercial benefit, please contact Regimental Headquarters before doing so since there are a number of issues which we need to consider. (over)

All proceeds/profits will go to the Welsh Guards Charity, registered charity 1152766

Registered Charity no. 1152766ce a Grenadier, Always a Grenadier"

Due to costs and legal concerns, we cannot permit street or house-to-house collections nor allow the use of collection boxes.

Raffles and lotteries are highly regulated. Before organising either, please check with the Institute of Fundraising (www.institute-of-fundraising.org.uk) or in the case of lotteries with The Gambling Commission (<http://www.gamblingcommission.gov.uk>).

If food or drink is being sold at a fund raising event, it's best to use a venue which already has a licence. Likewise, it is advisable to check that the owners of the venue already have Public Liability Insurance.

Safety

You must comply with the Health and Safety at Work Act 1974 (www.hse.gov.uk/pubns/law.pdf) and all other relevant subordinate legislation.

Carry out a risk assessment of the environment you plan to operate in with a view to minimising the risks involved.

Consider any First Aid requirements. Contact your local branch of St John Ambulance for advice. Consider fire safety.

Make sure that everyone is safe while attending a fundraising event or activity for The Fund. Particularly keep an eye out for the safety of children under 16.

Remember - careful planning and good administration are keys to successful fundraising

Good luck!