



# Fundraising Information Pack

## Ideas and advice to help you reach your fundraising target

### **You can do it – We are here to support you!**

Some people organise big events to raise sponsorship, others do things on a smaller scale and/or get other people to organise things on their behalf. Some rely solely on donations from family, friends, and business contacts. You must choose whatever suits you best. One thing is for sure – you need to draw up a plan!

This pack contains some advice, ideas, and useful tips to help you on your way but we are always here to talk through any ideas so please feel free to e-mail or pick up the phone!

### **YOU CAN DO IT!**

If you want to reach that fundraising target you will.  
Just find out the methods of fundraising that work for you.

If you need further information, ideas or advice please do not hesitate to call  
our fundraising team at the Lake District Calvert Trust on

**017687 72255**

or email: [fundraising@calvertlakes.org.uk](mailto:fundraising@calvertlakes.org.uk)



## **Fundraising tips**

### **Write a Fundraising Plan**

Before you start any fundraising, you need to have a plan. The task of raising the sponsorship can seem quite daunting when you are faced with a blank piece of paper. What you need to do is to begin to build up a picture of how you will raise the money.

**Set your fundraising target** so that you and your supporters know what you are trying to achieve.

### **Decide how you want to raise money**

You may decide on one method or a combination. (See the attached list of ideas for inspiration).

### **Set up an online donation page**

Lake District Calvert Trust is registered with the following online fundraising site: Just Giving. You can set up a fundraising page through: <https://www.justgiving.com/lakedistrictcalverttrust/donate>

### **Make a list of all your potential supporters**

It's not what you know it's who you know... Make a list of all the people you know, even those you haven't been in contact with for some time. All of these people have the potential to help you in your fundraising quest, either by making personal donations or by practically helping – organising a fundraising event for you, putting you in contact with other people or organisations. You might initially think that you don't know many people – wait until you start thinking and writing them down, you will be surprised.

Examples:

- Close family and other relatives at home and abroad
- Friends including those who have moved or who you don't see so much
- Old school, college, or university friends
- People who you have met on training courses/evening classes
- Social contacts – clubs you or your partner belong to
- Your current employer, colleagues, and people you have worked with in the past
- Neighbours and other people, you know in the local area
- People who provide services to you e.g.: postman, local shops, pubs & restaurants you use.

### **Make the best use of your contacts**

Now you have made your list you need to decide how you are going to make the best use of all these people. These people are a resource, and you need to identify in your plan the best way to ask them for support.

## **Support from companies**

Companies can provide a major source of fundraising income. Here are suggestions as to how you can benefit in one or more ways.

- Approach companies with which you have a connection in some way. “Cold” mailings to companies are rarely successful. Find the link...friend, family, customer etc.
- Ask your employer to get your fundraising off to a flying start with a good size donation.
- If your company operates a matched giving scheme (many do) this is a major fundraising boost. It means that for every pound you raise they will donate a pound to the charity – doubling your sponsorship and halving your target!
- Get permission to ask your company’s suppliers for a donation. They are very likely to agree if they value your business.
- Use bulletins, newsletters, in house magazines, e-mail messages and notice boards to promote your efforts.
- If the company you work for holds social events, why not ask if any money they raise can go towards your target?

## **Fundraising Dos and Don’ts**

### **Do**

- Approach people by email, social media, phone or personally if you can
- Share the link to your online fundraising page with your contacts on email and social media
- Keep your sponsor form with you at all times: ask everyone you meet to sponsor you.
- Ask for the money there and then
- Make the most of other people’s contacts
- Get other people to help you reach your target

### **Don’t**

- Be shy to ask – the key to successful fundraising is to ask people either to help you or give you cash. If you don’t ask you won’t get!
- Leave it to the last minute. You need to draw up your plan as soon as you have signed up. Work out a month-by-month activity chart that will lead you to your target.
- Put all your eggs in one basket – draw up a variety of ideas in your fundraising plan. If one idea doesn’t work another one will.
- Write lots of letters to companies or shops that you have no personal connection with.



## Sponsorship Funds

Remember sponsorship monies raised can be paid to the Lake District Calvert Trust at any point in time and we would encourage you to do this prior to the event. We would encourage everyone to raise as much as possible and make this a top fundraiser for the charity.

### Ask up front

It is easier to collect sponsorship money when people make pledges, explain to them that you need to collect money before you go.

### Donations from Companies

Make sure you tell all companies you approach that they can now claim tax relief on charitable donations when calculating their profits for corporation tax. This will be between 5-25% of the gross donation depending on the company's size. So, the more companies give to you, the more tax relief they get.

### Sponsorship forms

These should be used to record the pledges and donations you receive for the Great North Run. We will send you three sponsorship forms in your pack. If you need more, please ask. **You will need to send a sponsorship form in with any donations on which the charity can claim Gift Aid.**

### Gift Aid

Gift Aid is a tax-effective way to increase the value of donations. If you provide the full name, home address of the donor and tick to confirm they are a UK taxpayer on your sponsorship form, the charity can claim back the tax the donor will have paid on that amount of money. For example, if someone donates £100, the charity can claim a further £25. In order to qualify for Gift Aid, proof of the date donations were paid must be given to the Inland Revenue by the charity; therefore, **you must send in a sponsorship form with the relevant payment so that the date these funds were banked can be recorded.** Please note however that the money reclaimed on Gift Aid should not be included as part of your fundraising target.

### Money that cannot be Gift Aided

- Donations from anyone who is not a UK taxpayer
- Money raised via events or raffles
- Donations from companies (they claim back the tax themselves)

## Methods of payment

### Cheques

Please ask your sponsors to make cheques payable to the **Lake District Calvert Trust**. Keep a record of all donors and amounts collected on your sponsorship forms. It is important that we are aware of donations that are eligible for Gift Aid. If donations are eligible, please send us the original sponsorship forms with the donor's full details, as described on the forms. You may keep a copy for your own records, but we must have the original forms.

### How to pay in your funds

You should send all the donations you receive to the Lake District Calvert Trust. We suggest you do this on a regular basis – maybe monthly – rather than sending them all in at the end.

Funds can be paid by BACs to:      Account name: **Lake District Calvert Trust**  
Sort code:      **20-66-97**  
Account no:      **10220086**

Cheques should be posted to:      Lake District Calvert Trust, Fundraising  
Little Crosthwaite  
Keswick  
CA12 4QD

### Matched Giving

Many companies will match the funds you raise pound for pound. Please ask your company if they will match the funds you raise and if they do, send the relevant form to the Lake District Calvert Trust who will arrange for it to be processed. You will be advised once matched funding is received and credited to your fundraising total. You should be aware however that this can take some months as many companies only make matched giving payments on a quarterly or half-yearly basis.

### Online giving

You can set up your own personal fundraising account online and ask your friends, family, and business contacts to make donations using their debit or credit card.

Friends and family all over the world can donate online with a credit or debit card – so no more running around with paper sponsorship forms or chasing people for cheques or cash.

All you do is create your own online sponsor page, email it to all your contacts and ask them to donate quickly and easily online.

Online fundraising facilities offer secure webpages to make sure all card information is totally safe. The donation is then paid directly to the Lake District Calvert Trust. Your supporters can also Gift Aid their donation when they make the payment online.



## Sample fundraising letter

Dear

I am writing to ask for your support for a major challenge I am undertaking in XXX to raise funds for the Lake District Calvert Trust.

In September I will be taking part in ... which will involve...! I have pledged to raise a minimum of £... for the Lake District Calvert Trust, charity number 270923.

The charity helps change the lives of people with even the most profound physical, sensory and learning disabilities along with their friends and families by proving that adventurous activities such as sailing, canoeing, abseiling, horse riding, archery, ghyll scrambling, hand-cycling, and mountaineering can be achieved by anyone, regardless of disability. The key is in the achievement – this builds self-esteem, motivation, independence, and a sense of ‘can do’ rather than ‘can’t do’. The charity must raise over £500,000 a year to continue this vital work which is why sponsored events like this one are key to fundraising at the Trust. More information on the charity can be found on: [www.calvertlakes.org.uk](http://www.calvertlakes.org.uk)

If you can help by making a donation, I would be very grateful. Cheques should be made payable to the Lake District Calvert Trust, or you can donate online at.....

Thank you in anticipation of your support and encouragement. I will let you know how my challenge, both the run itself and fundraising, goes.

Yours sincerely

## Sample press release

*You can adapt this press release to include your own personal information and send it to News Editors of local and evening newspapers, and any trade magazines that are appropriate e.g.: produced for the industry in which you work or are associated with through sport or leisure interests.*

### **Date**

E.g. DAVE'S GREAT NORTH RUN CHALLENGE FOR THE LAKE DISTRICT CALVERT TRUST

Penrith Estate Agent, David Smith has responded to an appeal by the local charity, Lake District Calvert Trust to help raise £20,000.

Dave, 46 is joining other participants in the Great North Run which means him running a distance of 13.1 miles. He needs to raise a minimum of £300 to help this vital charity and he is asking local people and companies to help him reach this target.

Dave has been busy with training by.....

To pledge your support for Dave either post your sponsorship donation, made payable to the Lake District Calvert Trust, to him at ..... or telephone him on ..... or sponsor via his On Line giving website: ...

**END**