

CAMPAIGN REVIEW

The Giving Campaign 2001–2004



Acknowledgments

The Campaign extends our warmest thanks and appreciation to all who have helped make our work a success. These include the Executive Committee, Advisory Group, Research Group, Reference Group, All Party Parliamentary Group, Charity Financial Product Development Group and Giving Nation Steering Group. We are grateful to Stephen Timms MP, The Rt Hon Paul Boateng MP and John Healey MP, who have all had responsibility for the Campaign during their time at HM Treasury and who have each added significantly to our success. Our thanks also go to The Rt Hon Gordon Brown MP, Chancellor of the Exchequer, who has been supportive of our work for the duration of the Campaign.

We would like to express our gratitude to Stephen Ainger, Simon Hebditch and the CAF trustees who, in addition to generously providing funding, allowed us to operate under their legal framework; Stuart Etherington and Campbell Robb from NCVO, Marjorie Williams and Jackie McGeehan at the Inland Revenue, Fiona Mactaggart MP and Helen Edwards at the Active Communities Directorate and ministers and officials at the Department for Education and Skills.

Thanks are due to 30 of the top 50 charities who made financial contributions to the Campaign (a full list of our funding partners can be seen in appendix i). This made a tremendous difference to our work, giving the Campaign the endorsement to speak for the sector as a whole.

Finally, we would like to thank the countless organisations who helped us; including The Sunday Times, the Financial Services Authority, the Charity Commission, the Institute for Philanthropy, ShareGift, the Institute of Fundraising and Philanthropy UK.

Contents	Page
Chair's Assessment	2
Director's Report	3
Campaign Highlights	4
Campaign Objectives	5
Stream 1: Targeting Wealthy People	6
Stream 2: Tax-Effective Giving	8
Stream 3: Employers and Employees	12
Stream 4: Young People	15
The Giving Campaign Wales	17
Research Programme	17
A National Media Campaign: Press & PR	18
Website	19
Exit Strategy	20
Campaign Governance and Structure	20
Appendices: Appendix i – Funding partners	22
Appendix ii – Income and expenditure	23
Appendix iii – Published materials	24
Appendix iv – Business champions	28



Joel Joffe

Chair's Assessment

The Giving Campaign was the brainchild of Michael Brophy, former Chief Executive of the Charities Aid Foundation, and Stuart Etherington, Chief Executive of the National Council for Voluntary Organisations. The Rt Hon Gordon Brown MP, Chancellor of the Exchequer, agreed to support the Campaign, and called on the voluntary sector to play its part.

Our vision was to encourage a stronger culture of giving and we have gone some way down the road towards achieving that. By setting targets we have been able to measure and report on our progress. Some we have met and exceeded, others we did not meet in full. There was also much in the Campaign that could not be measured and yet became part of our overall impact.

I am pleased by what has been achieved during our three year lifetime. The innovative programmes, media coverage, the quality of the toolkits and materials, and the range of audiences we have reached, amount to an impressive body of work.

Much of our progress has been down to the partnerships that have developed between the key players in the voluntary sector, Government, business community and our staff team. All have contributed enthusiastically in a positive and supportive way without seeking to dictate or dominate and I am most grateful to them all for their invaluable support.

The staff team at The Giving Campaign, so ably led by our Director, Amanda Delew, and our Associate Director, Phillip Mind (and before him David Roe) have demonstrated a commitment and passion for the Campaign's success and have worked with great enthusiasm and effectiveness. I could not have wished for a better team or a more inspirational leader.

The Campaign has boosted giving, but there remains a long way to go before we are giving as generously as the USA. In particular, we must persuade the better-off to give more. In our Blueprint for Giving, which we will publish in June 2004, we will explore this theme, and consider the role that charities, employers, Government and the media could play in building a more generous society.

A handwritten signature of Joel Joffe in red ink, written in a cursive style. The signature is positioned above the printed name and date.

Joel Joffe
May 2004



Amanda Delew

Director's Report

I am proud of all the work undertaken by the Campaign team. We benefited from the advice and support of a wide range of individuals and organisations.

I hope that you have come across one of the many publications that we produced. All were distributed free of charge to charities across the UK. I am particularly delighted with the Fundraiser's Guide and the Trustees' Guide, both of which are being taken on by other organisations.

One of the Campaign's key achievements has been the development of a brand for Gift Aid. Created at the request of the sector, the 'giftaid it' brand is increasing donor awareness of Gift Aid. Its use by many leading charities demonstrates its value and, together with our best-practice Gift Aid donation and sponsorship forms, it is a lasting legacy of the Campaign.

No one predicted the huge amount of press and PR activity that would be generated by the Campaign. Coverage has been achieved in all of the national broadsheet and tabloid newspapers, regional newspapers and radio across the UK, as well as voluntary sector, business, youth and financial media.

Giving Nation is one of the real jewels of the Campaign. Created to fit within the citizenship curriculum, Giving Nation has been welcomed by teachers, pupils and charities alike. Now under the care of the Citizenship Foundation, it is set to deliver future generations of committed givers.

Finally, I am delighted that we have been able to invest in researching and developing charity financial products. Products are currently being developed which offer new ways for donors to target their giving. This work may have a very real impact on charitable income in the years ahead.

I have been fortunate to work with Joel Joffe, a man of enormous integrity and passion, who has led the Campaign with skill and decisiveness. I have also been lucky to have had the support of an Executive Committee who judged their role with perfection and acted as guides and innovators. Finally, I would like to thank my dedicated and committed staff team. Each of them has brought something unique to the Campaign and each has ensured that their work is of the highest quality. We have had fun and worked hard, but most importantly, I believe we have remained true to the original goals of the Campaign.

Amanda Delew
May 2004

Campaign Highlights

2001

June	Launch of first Gift Aid leaflet
July	Launch of The Giving Campaign
October	Published first research report – Advice Worth Giving
November	Charity Commission distributes 180,000 tax-effective giving leaflets
December	Christmas Gift Aid Campaign
December	Launch of Share Giving pack

2002

January	Start of tax-effective giving training workshops
March	Share Giving advertising and PR campaign
June	Launch of Giving Nation
July	Published Gift Aid toolkit, introducing new brand for Gift Aid
August	Published research report into wealthy donors and Payroll Giving – Giving at the office
October	Launch of Payroll Giving toolkit at the DTI with Stephen Timms MP
October	Publication of charitable giving supplement in the Financial Times
December	Davina McCall asks donors to use Gift Aid when giving to charity at Christmas
December	Payroll Giving breakfast with the Chancellor at 11 Downing Street
December	Launch of All Party Parliamentary Group at the Speaker's House

2003

March	Launch of The Giving Campaign Wales
March	Debate: The Future of Giving?
March	Publication of charitable giving supplement in the Economist
March	Seminar for trustees of top 100 charities
April	FSA distributes 11,000 tax-effective giving leaflets to financial advisers
April	The Sunday Times Rich List publishes details of charitable giving
May	Launch of G-Nation 'Giver or Taker' web competition
May	High value fundraisers event and launch of research report
June	First national giving week (G-Week) takes place
July	Payroll Giving regional PR campaign
October	G-Nation Awards presented at 11 Downing Street
October	Launch of charity financial products research report
December	Public urged to join amnesty on tacky Christmas gifts and give to charity instead

2004

February	G-Nation award winners (Brine Leas school) visit Red Cross project in South Africa
February	Launch of Lent PR campaign; give the money you save from Lent abstinence away to charity
February	Launch of The Big Leap
March	Debate: A wealth of opportunity?
April	The Sunday Times Rich List, complete with charitable giving feature
April	Financial advisers event 'An Interest in Giving' promoting charity financial products
May	Seminar for high value fundraisers – targeting the mass affluent
June	Publication of A Blueprint for Giving

Campaign Objectives

The Giving Campaign was launched on 19 July 2001 to:

- encourage a culture of giving;
- increase the number of donors and amount donated.

Closing on 30 June 2004, this document is a review of the full three years of The Giving Campaign. It describes what we have achieved and how, the successes and the lessons learnt.

The Giving Campaign's vision

A culture of giving where it is natural for everyone able to do so to give money and time to improve the quality of life for others.

The Campaign was set up for a three year fixed term and was established with a set of clearly defined objectives. We worked closely with senior players in the voluntary sector to establish what could be achieved in the timescale available and what would be of most value to the long-term growth of the sector.

An early strategic decision was made to ensure that we worked closely with influential organisations, to limit any duplication of effort. As a result, the Campaign did not dedicate any significant resource to promoting legacies and decided instead to provide office accommodation and support to the Legacy Promotion Campaign. This Campaign has proved to be a success and will continue at least until 2006. Other organisations whose work we endorsed, but where we did not extend our remit, included the Association of Charitable Foundations, Business in the Community and the Community Foundation Network.

We wanted to achieve the following:

- raise awareness of the tax reliefs for charitable giving amongst donors, charities, employers and financial advisers;
- promote planned giving in the workplace;
- aid the development of a generation of young people committed to giving;
- help increase the total amount given to charity, and meet our overall goal of increasing giving by half a billion pounds during the lifetime of the Campaign.

As a result, the Campaign developed four work streams:

Stream 1:
Targeting Wealthy People

Stream 2:
Tax-Effective Giving

Stream 3:
Employers and Employees

Stream 4:
Young People

Stream 1: Targeting Wealthy People

At a Glance

- The inclusion of charitable giving within The Sunday Times Rich List
- Researched and publicised the market for charity financial products
- Direct mailing of leaflets about tax-effective giving to three million higher rate taxpayers

Generally wealthy people give a lower proportion of their income to charity than those less well-off. Amongst donors, the richest 20% give 0.7% of their household expenditure to charity, while the poorest 20% give 3%.

The Campaign targeted wealthy people through media activity to win their hearts and minds. Given their strategic importance in communicating with wealthy people about their expenditure, the Campaign worked with financial advisers and the financial services industry to secure the inclusion of charitable giving in their advice, client contact processes and products. The Campaign's vision is for wealthy people to consider charitable giving in relation to their overall income and wealth as an integral part of their financial planning.

"The Giving Campaign has shown quite how favourable the climate for giving in the UK has become. It has shown how financial planning and charitable giving really should go hand-in-hand. It has provided the basic information to make giving an integral part of a financial discussion."

Paul Smee, Chief Executive, Association of Independent Financial Advisers



Dame Stephanie Shirley

"Wealthy people often like to measure and benchmark what they give to – giving is an investment to us. We need to know what charities are doing with the money and for them to demonstrate good housekeeping."

Over the last three years, The Giving Campaign has worked with The Sunday Times to include information on charitable giving within The Rich List and hopes that The Sunday Times will continue to report on charitable giving in this list.

To put giving on the financial planning agenda, The Giving Campaign has:

- published a report, 'Charity Financial Products – a new approach to giving', on the ways in which the financial services industry could integrate charitable giving into its sales processes and products;
- undertaken NOP World research showing that 40% of wealthy people would choose a financial product that has a charitable element over a regular one;
- published a guide to tax-effective giving for distribution by the Financial Services Authority, Institute of Financial Planning and the Association of Private Client Investment Managers and Stockbrokers. These were distributed to more than 30,000 intermediaries and clients;
- partnered with HSBC, HBOS, Zurich Financial Services and the Co-operative Bank to incorporate charitable giving within their client advisory services;



Financial advisers are increasingly promoting giving to their clients

- secured the inclusion of tax-effective giving on the financial services industry's Single Examination Framework and worked with industry training bodies to lobby for the inclusion of tax-effective giving in their training programmes;
- liaised with the Inland Revenue to include a guide on tax-effective giving in a mailing to three million higher rate taxpayers. This was followed by 'giftaid it' branded mailings in 2003 and 2004;
- built a network of champions from the financial services sector to support this work and highlight the benefits to the sector.

The net result of these activities is that the Campaign has put charitable giving on the agenda of the financial services sector. Some companies, like the Co-operative Bank, now see advice on tax-effective giving as an integral part of their customer service and regard information provision as a first step into this area. Some major providers are seeking charity partners to work with them on charity financial product launches. And a number of leading charities are looking at fundraising opportunities in this new market.

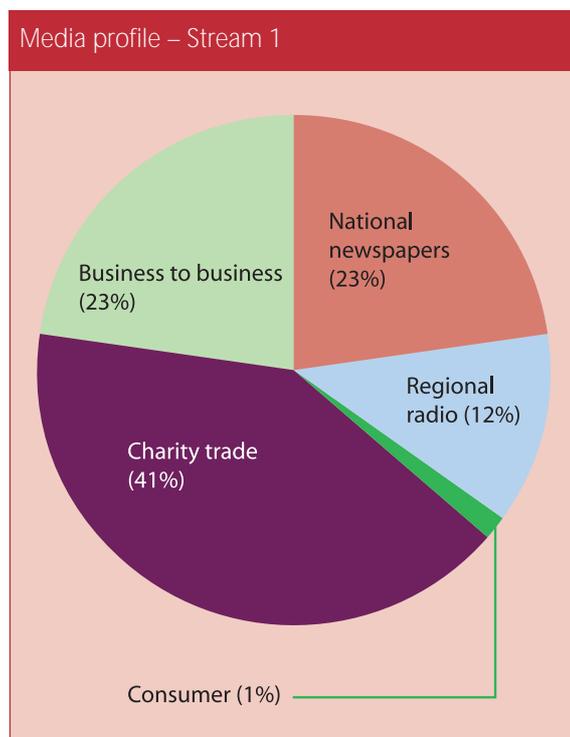


The emerging marketplace in charity financial products, and the existing products provided by Charities Aid Foundation (CAF) and Charity Bank, will undoubtedly become mainstream in the coming years.

CAF will be taking forward this remit, which will add to their own investment of resources in developing the charity financial product market, giving it a new generic dimension. A new Advisory Group will work with CAF to help encourage market developments and support the programme.

Media highlights

- Partnered with The Sunday Times, The Economist and the Financial Times to distribute supplements on charitable giving to their readers
- Front page feature in the Money section of the Saturday Times about the emerging market of charity financial products in the UK
- Feature articles on tax-effective giving and charity financial products in the financial trade press, including Money Marketing, Investment Week and Financial Adviser.



Stream 2: Tax-Effective Giving

At a Glance

- Launch of Gift Aid brand
- Production and distribution of 20,000 fundraiser and 10,000 trustee guides
- Tax-effective giving training for more than 1,000 fundraisers

In Budget 2000, the Chancellor made a number of changes to the tax incentives to encourage people to give more to charities across the UK. The tax reforms made Gift Aid, Payroll Giving and Share Giving much more generous and offered donors the flexibility to structure their giving to benefit themselves and the charities they support. And yet, many charities have failed to promote these reliefs to their supporters.

The Campaign aimed to educate charities and the public about the tax reliefs and to encourage them to use them more widely, providing accurate, tailored and accessible information. The materials give charities the tools they need to promote the tax reliefs to their donors. All our materials were promoted widely and were available free of charge. Our work included:

- free training for more than 1,000 fundraisers in tax-effective giving and a series of presentations to umbrella groups, clubs and associations;
- distribution of 20,000 copies of the fundraiser's guide 'Make giving go further';
- attendance at a broad range of conferences, making use of speaking opportunities where available;
- high profile PR campaigns promoting Gift Aid at Christmas and general media promotion of tax-effective giving.

The Campaign worked with trustees to encourage them to play a role in fundraising. Tax-effective giving impacts how a cause is communicated, relationships with supporters and aids planning for the long term future of the charity. Trustees are in the unique position of often being able to see the 'bigger picture' and can make an important contribution to their charity's fundraising programme.

With this in mind, The Giving Campaign ran a series of seminars for trustees, launched a guide to fundraising and produced a video to support trustees in their understanding of the giving methods.

Gift Aid

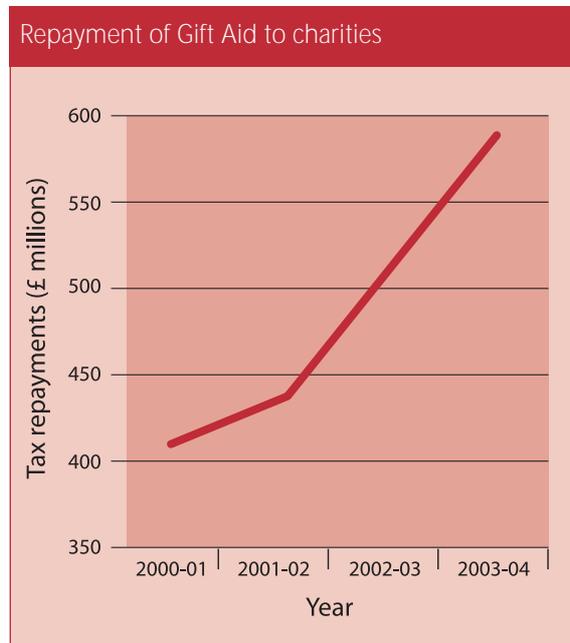


There has been a steady growth in the number of charities using Gift Aid. But there is still scope for greater awareness and wider use of the relief.

In March 2004, we published research on the use of Gift Aid by charities. It showed that some charities have converted more than 80% of their donors to Gift Aid. But the average conversion rate in 2003 was 45%, up from 40% in 2002.

The Campaign has provided charities with the tools to help build donor awareness of Gift Aid including:

- launch of the Gift Aid toolkit – a CD Rom offering charities a simple way of explaining the benefits of Gift Aid to donors and a model Gift Aid declaration;
- new branding for Gift Aid, now being used by 60% of charities participating in a recent survey, and generating more widespread donor awareness of Gift Aid;



- guidance on maximising Gift Aid from sponsored events.

Charities hold the key to greater usage of Gift Aid by communicating its importance to their donors. Donors are motivated to give in this way when they understand what it means for the cause they are supporting. The onus now lies with charities to take responsibility for educating their supporters about the difference that an extra 28% of Gift Aid revenue can make.

Share Giving

Share Giving is the most generous tax relief available to donors, combining relief on income and capital gains tax, and yet there is relatively low awareness of the scheme.

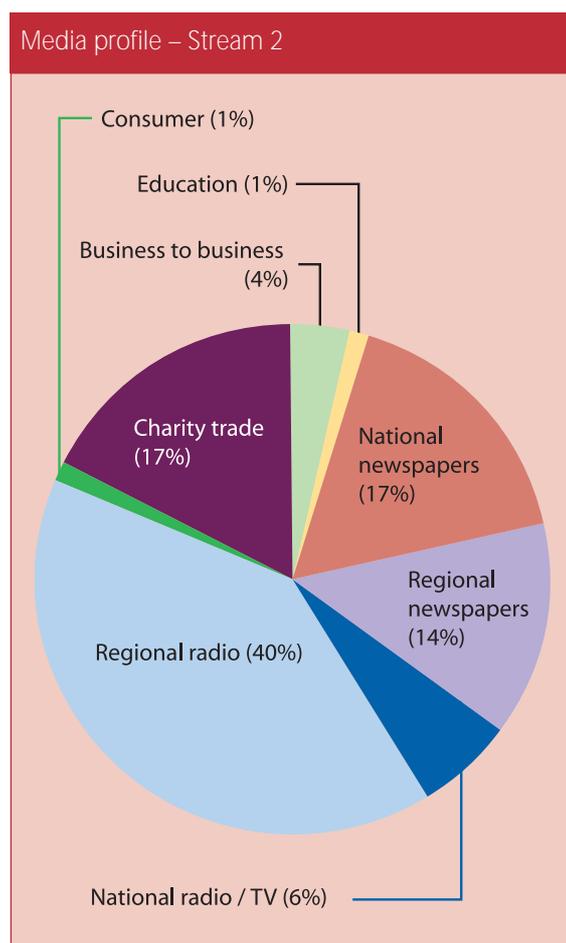
This tax break was worth £220 million in 2000-01 and £149 million in 2001-02, with the number of donations increasing from 21,517 to 21,868. During the lifetime of the Campaign, the fall in stock market values (worth £400 billion in 2002 alone) made for an unfavourable environment for promoting the relief. After a national advertising campaign in Spring 2002, the Campaign took a more low-key approach to promoting gifts of shares, aiming to educate fundraisers and financial advisers through promotion and production of a range of materials.

Recent research shows there is still a low level of usage of the relief by charities, and a low awareness of the relief by financial advisers. There is tremendous growth potential for Share Giving.



Media highlights

- Use of celebrities Davina McCall and Eddie Izzard to front Christmas Gift Aid campaign in the regional media
- 15 national newspaper double-page features on tax-effective giving
- Launch of online tax-effective giving resource centre at www.givingcampaign.org.uk



Measuring our impact

The Campaign set a range of targets to measure its impact. They are brought together in the table below.

Campaign target	Baseline measured	Progress to July 2002
STREAM 1 Double the number of financial advisers giving advice on charitable giving	18% give advice often/ fairly often (August 2001)	N/A
STREAM 2 Gift Aid – Charities: 10% annual increase in number of charities making claims for tax repayment	39,962 (2000/1)	14% increase to 45,746 (2001/2)
Annual repayment of tax to charities to increase to £600m	£410m (2000/1) [figures show £222m for Gift Aid and £188 for Covenants]	£437m (2001/2) [figures show £415m for Gift Aid and £22m for Covenants]
Gift Aid – Donors: 33% of donors using Gift Aid	20% of donors (July 2001)	24.1% of donors (July 2002)
Shares – Donors: At least £100m annual share donations	£220m (2000/1) Revised from £100m by IR in 2004	£149m
STREAM 3 Increase Payroll Giving by at least £100m	£55m (2000/1)	£72m (2001/2)
Increase number of employees in Payroll Giving schemes to 1.5m	0.6m employees (2000/1)	0.6m employees (2001/2)
Persuade 90 of the top 100 charities to agree to introduce schemes for their own staff	31 charities are contracted to a Payroll Giving scheme (May 2002)	N/A
STREAM 4 150 schools participate in G-Week 2003	Nil	N/A
300 schools use the Giving Nation materials in the academic year 2002/3	Nil	N/A
2% of 11-16 year olds aware of Giving Nation and/or G-Week by September 2003	Nil	N/A
GENERAL Increase the total level of individual giving by £0.5 billion	*£6.76 billion (2000)	*£6.9 billion (2001)

* Prices quoted after adjustment as per RPI

Progress to July 2003	Progress to July 2004	Source Notes
N/A	25% give advice often/ fairly often (April 2004)	MORI Survey (Aug/Sept 01), commissioned by TGC, published as research report 'Advice Worth Giving'. NOP survey (Apr 04) commissioned by TGC, published as 'Giving Good Advice'
10% increase to 50,407 (2002/3)	10% increase to 55,524 (2003/4)	Inland Revenue – unpublished statistics, provided on request from TGC
£512m (2002/3) [figures show £506m for Gift Aid and £6m for Covenants]	£580m (estimate for 2003/4)	Inland Revenue website, (www.inlandrevenue.gov.uk/stats/charities/c_T03_1)
31.2% of donors (July 2003)	No figures available to date	NOP Survey, commissioned by CAF/IR/NCVO in July 2001, by CAF/NCVO/TGC in July 2002
No figures available to date.	No figures available to date	N/A
£86m (2002/3)	No figures available to date	Inland Revenue website, (www.inlandrevenue.gov.uk/stats/charities/c_T04_1)
0.5m employees (2002/3)	No figures available to date	Inland Revenue website, (www.inlandrevenue.gov.uk/stats/charities/c_T04_1). Statistics collated from data supplied by Payroll Giving agencies
53 charities are contracted to a Payroll Giving scheme	62 charities agreed to promote	TGC – unpublished research
400 schools	No figures available to date	TGC – unpublished research
750 schools used materials	No figures available to date	NOP survey commissioned by TGC (Sept/Oct 03)
11%	No figures available to date	NOP survey commissioned by TGC (Sept/Oct 03)
£7.3 billion (2002)	No figures available to date	NOP survey, commissioned by NCVO/CAF. Figures are calculated from a quarterly survey (March, June, September and December) looking at individual giving, aggregated to form an average monthly giving sum and multiplied by 12 to give a total figure representing annual giving

Stream 3: Employers and Employees

At a Glance

- Launched three Payroll Giving toolkits for large companies, SMEs and charities
- Published research on the business benefits of Payroll Giving
- Established All Party Parliamentary Group to promote Payroll Giving

In the USA, 35% of employees give to charity through their payroll, compared with 2% in the UK. There is a very different cultural approach to workplace giving in the USA, but the Campaign believes there is significant potential for increased uptake in the UK.

The tax relief for Payroll Giving is particularly generous. For a higher rate taxpayer, a £20 donation costs just £12 from net pay, when tax relief is taken into account. For a standard rate taxpayer, the same donation costs £15.60.

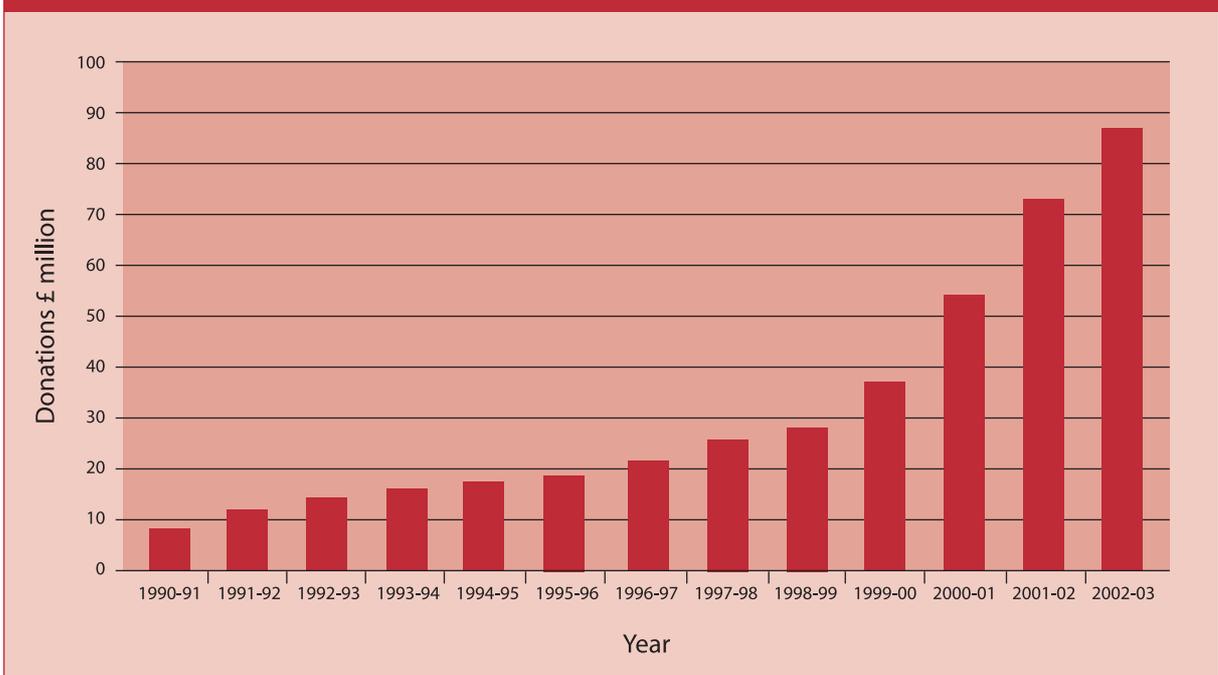
Payroll Giving has grown incrementally in recent years and is now one of the fastest growing fundraising methods in the UK, and yet too few companies are currently signing up to the scheme.



Payroll Giving materials

The Campaign focused on working with the largest employers to encourage them to promote Payroll Giving to their employees, seeking 1:1 meetings with senior managers within the target companies. Having secured the active support of a small number of high-profile business leaders it was possible to reach out to a wider network. The Campaign launched a practical toolkit in October 2002, which contained a detailed business case for Payroll Giving and issued a challenge to employers to reach a 10% participation rate among their employees, (see appendix iv for a list of participating companies).

Payroll Giving – amount donated



"At The Royal Bank of Scotland Group, Payroll Giving is an integral part of our successful Community Investment Programme. Over £15.5million has been generated directly as a result of our employees' Payroll Giving since The Giving Campaign was launched in July 2001. As the only company to double match our employees' charitable donations made in this way, we can demonstrate our commitment to the good causes that matter to them. I am delighted with the scheme's success and would encourage every company to introduce Payroll Giving – it is simple and highly effective."

Fred Goodwin, Group Chief Executive,
The Royal Bank of Scotland Group

A similar toolkit was published for small and medium sized businesses and distributed to more than 15,000 companies. The Giving Campaign welcomes the Budget 2004 announcement that the Government will provide a grant for SMEs that introduce a scheme for their employees.

The support of key business leaders, who have championed Payroll Giving in their organisations, has been instrumental in influencing other FTSE 100 companies to promote the scheme. The Campaign was fortunate to attract the help and support of David Arculus (Severn Trent), Margaret Jay and Robin Pauley (BT Group), Sandy Leitch (formerly of Zurich Financial Services), John Rivers and John Rose (Rolls Royce), David Varney (MM02) and Mike Wilson (St James's Place). These business leaders hosted breakfasts to encourage their peers to help promote Payroll Giving. It is clear that that this high level support and leadership is absolutely essential if Payroll Giving is to succeed in the UK. Business leaders need to play a more active role promoting the scheme to their employees, as part of a stronger corporate commitment to community involvement. The case study from Prudential illustrates the difference board level support for Payroll Giving can make over a short period.

At St James's Place, there is a long-established culture of employees giving to charity, with over 80% of employees making regular donations to charity through salary deductions. This is due to the enthusiastic leadership of the Chief Executive, Mike Wilson, whose passion for charitable giving has filtered throughout the company.

COMMUNITYPRU is a framework for the time and money Prudential UK employees contribute to the community. Led by their Chief Executive, Mark Wood, Prudential introduced Payroll Giving in May 2003 to coincide with the annual employee pay review and bonus payments. Employees have since donated £111,000 to UK charities and the company has matched 94% of these donations.

"Since launching the scheme in May 2003, we have continued to promote Payroll Giving through the intranet, posters, booklets and payslip advertisements. This internal promotion has seen staff taking real ownership of it and participation has risen by 12% since May 2003."

Russell Martin, Director of Human Resources,
Prudential

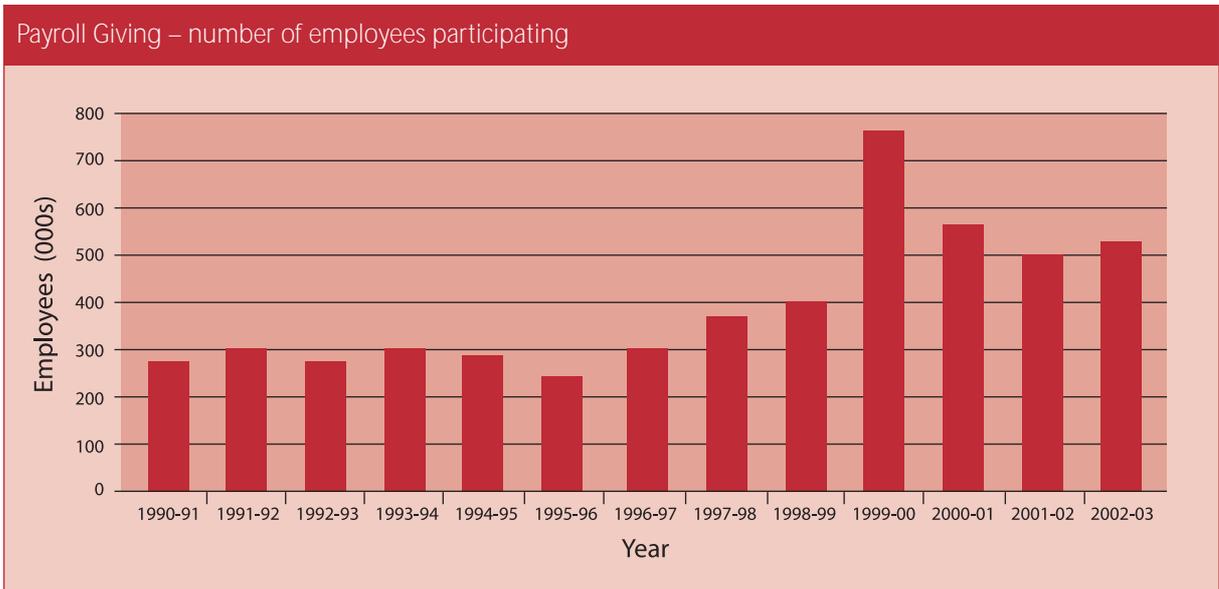
The Campaign sponsored a pilot in Crawley to act as a model for local charities working together to encourage local employers to promote Payroll Giving to employees, and published 'Opening Doors for Charities – Toolkit for Payroll Giving Community Charity Partnerships'. Since then, the Campaign has provided start-up grants for eight consortia across the UK to extend this pilot.

The Diocese of Sheffield is one recipient of a £2,000 grant from The Giving Campaign to launch Charities Together, comments:

"Employers sometimes find that dealing with a large number of charities is time consuming and can be confusing. Charities Together represents charities working on projects ranging from neighbourhood regeneration to helping people who are going through divorce and separation. By dealing with Charities Together, employers only have to work with one organisation, rather than a representative from each charity, yet can still offer choice to their employees."

Karen Hubbard, Fundraising Manager for the
Diocese of Sheffield

Charities can play an important role in promoting Payroll Giving internally and beyond. The Campaign developed a toolkit for charities and provided practical advice, encouraging them to offer the scheme to their own employees. The number of charities offering Payroll Giving has almost doubled



– now 60 of the top 100 charities offer the scheme, compared to 31 in 2001.

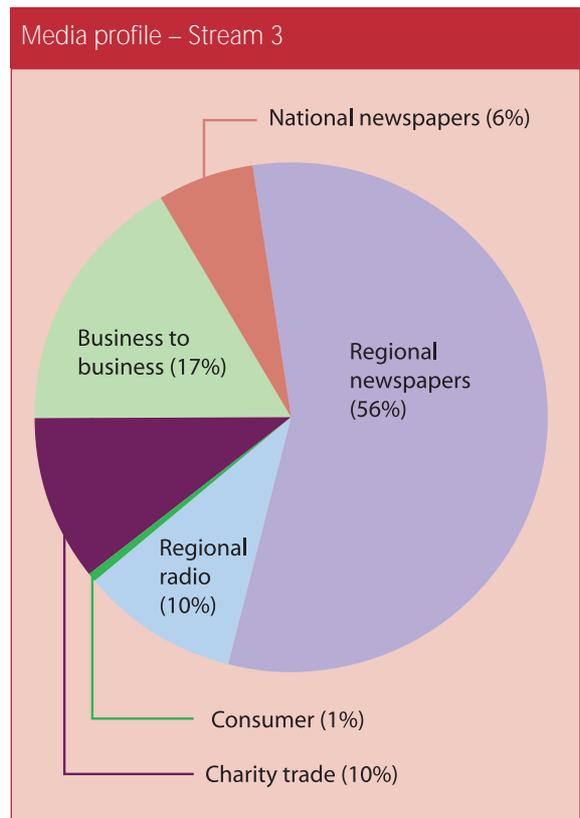
With the support of John Healey MP, Economic Secretary to the Treasury, we have encouraged central Government departments to give the promotion of Payroll Giving to their employees a higher profile. Some departments have reported an increase in employee participation, and others are taking active steps to include the promotion of the scheme in their HR communications. A number of departments have committed to the 10% employee participation target.

The Campaign also set up an All Party Parliamentary Group to promote Payroll Giving within Parliament and encourage MPs to promote the scheme to employers.

Whilst Payroll Giving donations have grown, it is disappointing when viewed against targets, that there has not been a more dramatic take-off in this form of giving despite our work and the Government's 10% supplement to donations. In particular, the number of employees participating has remained fairly static. Based on experience from working with large employers, it is undoubtedly the commitment from senior executives in driving and promoting Payroll Giving, that is the critical factor in building participation in the scheme.

Media highlights

- Achieved press coverage in over 100 major regional newspapers
- Secured the inclusion of Payroll Giving within the Guardian's Giving List
- Placed articles on the business benefits of Payroll Giving within variety of business to business trade press



Stream 4: Young People

At a Glance

- Giving Nation packs were ordered by over half of all secondary schools in the UK
- 400 schools took part in G-Week 2003
- Photo story in Elle Girl covering two G-Nation award winners and their trip to South Africa



Young people are key to the Campaign's vision of a culture where it is natural to give time and money.

Building on the new citizenship curriculum, the Campaign developed Giving Nation (branded as G-Nation for young people) which is intended to help young people understand and participate in giving.

The Giving Nation resource pack supports the teaching of citizenship through greater involvement in charity at a local, national or global level. Over 3,300 secondary schools have ordered the pack, more than half of the total number of secondary schools in the UK, far exceeding our original targets. To date, around 750 schools have used the pack and around 100,000 secondary school students have taken part in Giving Nation lessons.



Giving Nation resource pack material

"We will definitely be involved in G-Week this year, as it really brings the school together, getting our pupils to think of other people who are less well-off than them. The pupils gave such positive feedback and really got involved, particularly in our 'Swim the Channel' event, where they swam 22 miles, the same distance of the English Channel, but in our local swimming pool!"

Barbara James, Bursar and Eco School Co-ordinator for Long Eaton School in Nottingham.

Giving Nation is:

- an interactive website for young people and teachers at www.g-nation.co.uk now with over 10,000 registrations;
- the promotion of giving in young people's media, including a media partnership with emap (publishers of Smash Hits), and celebrity support from Liberty X, David Sneddon, Big Brovaz and Atomic Kitten;
- G-Week – a celebration of students' giving. The Campaign estimates that 800 schools will take part in this year's G-Week (26 June – 2 July 2004);
- G-Nation awards scheme offering 12 regional cash prizes of up to £1,000 and a star prize of an overseas trip. The 2003 winners, Brine Leas school went to see a Red Cross project in South Africa in February 2004;



Big Brovaz



Students involved in G-week

A Brine Leas pupil on the G-Nation trip to Cape Town



Brine Leas school kept a diary of their charity activity throughout the year, when they raised over £1,400 for HALT (the Horn of Africa Learning Trust), preparing boxes of classroom supplies for developing schools in Somalia. They raised their money through events, from doughnut eating competitions to school band nights. Brine Leas was awarded the G-Nation star prize for their video diary, winning £1,000 and the ultimate once in a lifetime visit to a Red Cross project in South Africa.

The trip took place in February 2004, when eight pupils from the school travelled out to Cape Town to take part in an education programme on HIV and AIDS, participating in workshops to raise awareness for women at risk and to also see first hand how international charities work on the ground. All pupils returned enlivened by their experience and have acted as ambassadors for charity and G-Nation.

Online activity for Giving Nation has been particularly strong with high click-through levels from Smashhits.net, habbohotel.com and kylielclub.com.

Giving Nation was based on careful research and evaluation. The first year's research showed that young people who had taken part in Giving Nation were more likely to give regularly in the future. They were also more positive about the work of charities and their own belief that they can change the world around them, than their peers who had not taken part in the programme. Separate research with teachers also showed a high approval rating for the materials.

Giving Nation has a long-term aim – to build the next generation of committed givers. Both the

Department for Education and Skills and the Home Office have given the programme financial backing for a further two years; and Citizenship Foundation has taken over responsibility for the programme.

INDIVIDUALS
ENGAGING IN
SOCIETY

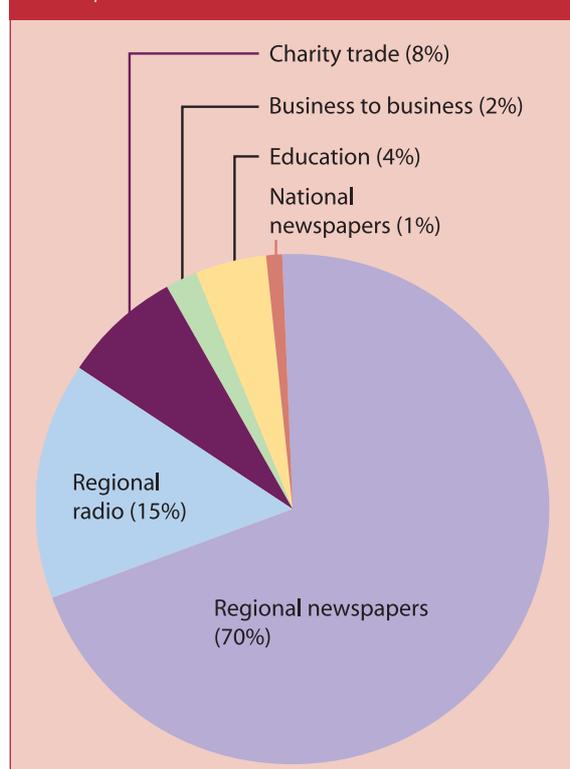
Citizenship Foundation

The Citizenship Foundation, which has a successful track record of delivering programmes to encourage young people to become active citizens, will provide an environment in which the programme can flourish. The Government's commitment to build young people's engagement with their communities, and the Russell Commission review of youth volunteering may provide an opportunity for the future growth of Giving Nation.

Media highlights

- Partnership with emap to increase the profile of charity in the youth media, including Smash Hits
- Promotion of Giving Nation as one-stop-shop for charity in schools
- Interactive website and viral campaigns
- Elle Girl photo story covering two G-Nation award winners and the trip to South Africa

Media profile – Stream 4



The Giving Campaign Wales

At a Glance

- Doubled the number of charities in Wales registered for Gift Aid
- Launch of tax-effective giving materials for charities in Welsh and English
- Introduction of tax-effective giving training in Wales



Launched in March 2003, in partnership with the Welsh Assembly and charities in Wales, the Campaign focused on increasing the take-up of Gift Aid. Since the launch, the number of charities registered for Gift Aid in Wales has nearly doubled. Many of the Campaign materials are now available in Welsh and there is a full Welsh language section of the website. Highlights from The Giving Campaign Wales include:

- distribution of 4,500 copies of a bi-lingual pack 'Gift Aid made easy' to smaller charities;

- training on tax-effective giving delivered through the network of County Voluntary Councils (CVCs) in Wales;
- regional promotion at various events, including the National Eisteddfod.

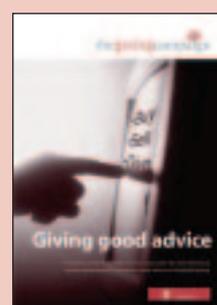
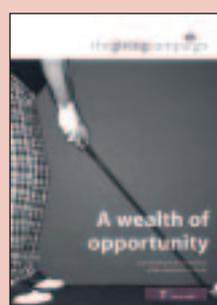
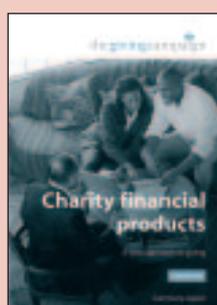
With the continued support of the Welsh Assembly, this work programme will be re-branded as Giving Wales, continuing under the direction of the Wales Council for Voluntary Action (WCVA).

Research programme

From the start, the Campaign based its work programme on high quality research. A full list of research published by the Campaign is available in appendix iii. The Campaign is indebted to members of the Research group for their advice on research topics, methodology and presentation.

All research was freely available, both in full and as a summary report; most papers were supported with a launch event and achieved significant press coverage.

The Research group will continue to meet under the auspices of NCVO and CAF with an expanded membership of researchers active in the field of individual charitable giving.



All research reports are available from www.givingcampaign.org.uk

A National Media Campaign – Press and PR

At a Glance

- Annual national newspaper coverage worth around £1 million in advertising expenditure, with an audience reach of over 151 million
- National and regional broadcast coverage of tax-effective giving
- Inclusion of Gift Aid in newspapers' Christmas charity appeals

The press and PR of the Campaign served two purposes: to support the work of the individual Campaign streams and to encourage and develop the positive profile of charitable giving in the media.

The media team aimed to establish the Campaign as the 'voice' on giving within the sector by:

- generating new and innovative media campaigns;
- proactively seeking media opportunities to positively publicise giving;
- responding promptly to a wide range of issues that affect charities and donors alike.

It has been vital for the Campaign to communicate effectively with charities and the voluntary sector trade media has been a key channel for communicating our messages. To ensure that smaller, regionally based charitable organisations had access to relevant news, materials and guidance, the Campaign also distributed a monthly e-mail newsletter to 2,500 charity contacts on request.

Media highlights

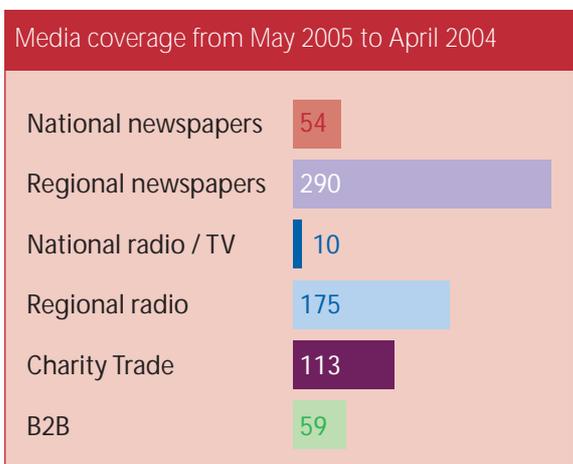
- 15 double-page spreads in the national papers on tax-effective giving;
- annual press coverage in the national newspapers equivalent to around £1 million in advertising expenditure;
- sponsored supplements in the Financial Times and the Economist;
- participation in national radio and TV programmes, such as BBC Radio 4, Sky News, Radio Five Live and BBC Radio One;
- positioning of charitable giving as a regular feature within personal finance pages of the newspapers;
- inclusion of charitable giving in The Sunday Times Rich List.

Press and broadcast coverage, innovative media campaigns and events helped to raise the profile of charitable giving. It is difficult to evaluate the precise impact of the press and PR activity, but the volume of coverage and the range of publications far exceeded initial expectations.

Media Campaigns

The Giving Campaign developed an innovative programme of proactive publicity campaigns to promote charitable giving, they included:

- Christmas Gift Aid;
- The Big Leap;
- The Christmas Gift Amnesty;
- Regional Payroll Giving;
- Lent charity call – give the money saved from Lent abstinence to good causes.



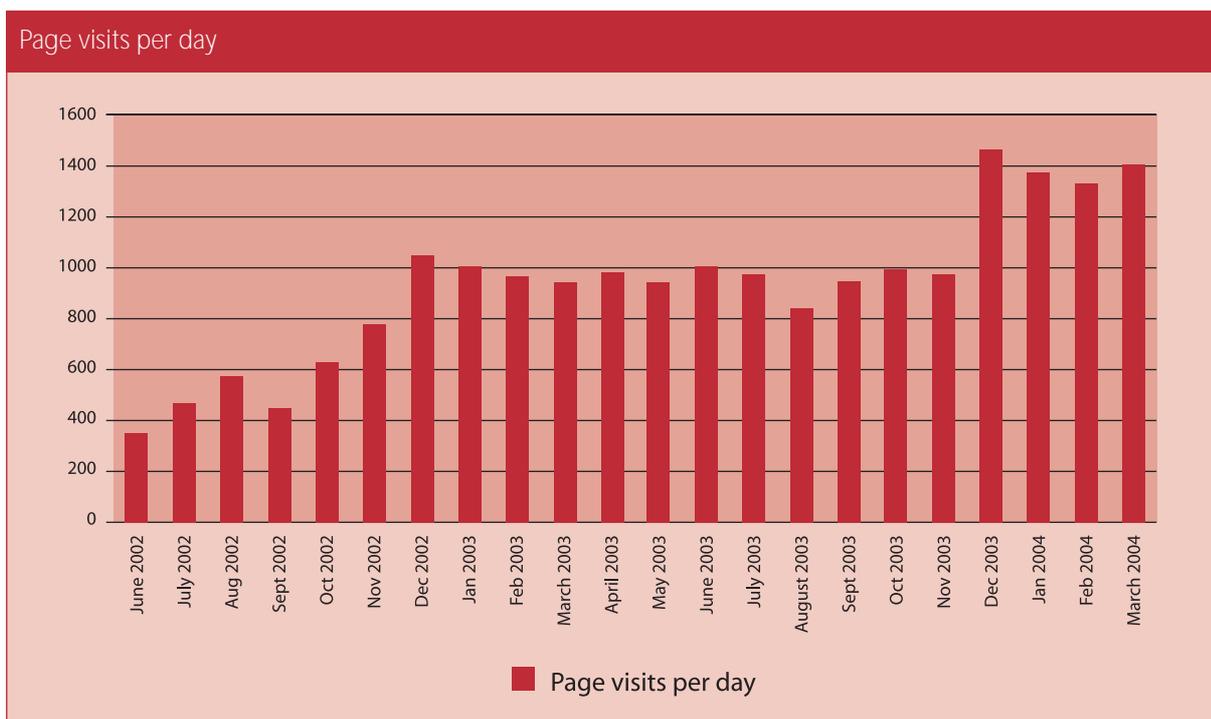
The Giving Campaign Website

www.givingcampaign.org.uk

The website remains a focal point for the Campaign, providing information on tax-effective giving and the work of the Campaign to charities and other audiences such as accountants, financial advisers, lawyers, employers and donors.

Serving as an online resource centre for tax-effective giving, the website features all Campaign materials for immediate access.

The website is increasing in popularity, as illustrated by the growth in hits and visits since we began collecting statistics in June 2002. There is now an average of over 6,000 hits each day. Page visits are illustrated in the graph below.



The Inland Revenue has agreed to keep the website online at least until March 2005. Information and materials from the Campaign website will also be available at UK Fundraising (www.fundraising.co.uk).

The Exit Strategy

In the first half of 2003, The Campaign consulted with its stakeholders on whether it should continue beyond its fixed three year period. It was concluded that it was right to remain with the original fixed term. The basis for the decision was:

- the Campaign was not intended as a permanent part of the landscape;
- funding partners resourced the Campaign on the basis of a three year commitment, and others gave their time knowing that their commitment was support limited;
- there is better awareness and use of the tax reliefs, and charities armed with the tools provided by The Giving Campaign are now best placed to promote the tax reliefs to their donors;
- where there is future potential other organisations will take forward this work. Some projects have been handed over in their entirety. Various organisations have agreed to distribute the Campaign's materials.

Despite having a fixed term, the momentum of the Campaign has not ebbed in the final year, thanks to the addition of a fifth quarter (a three month extension, from 1 April to 30 June).

The Campaign Governance and Structure

Having established what has been achieved and learnt over the past three years, this section of the Review addresses the way the Campaign has been run as a partnership between charities and Government.

Working to a fixed three year timeline has been instrumental in securing the investment of money, time and reputation. It is far more difficult to secure open-ended commitments. The funding level, an annual budget of just over £1 million, ruled out the option of high cost advertising campaigns and forced the Campaign to work strategically, influencing those with decision-making power to help deliver its messages.

The support of the Chancellor, the Economic Secretary to the Treasury and other Treasury Ministers has been integral to the Campaign. Various Government departments have helped the Campaign, most notably the Department for Education and Skills and the Active Communities Directorate of the Home Office. The Inland Revenue has invested over £3 million in the Campaign, and supported its work through secondments.

Under the direction of first Michael Brophy and then Stephen Ainger, CAF provided extensive 'back office' support through their finance, personnel, legal and communications departments. This was given at no cost to the Campaign and the individual members of staff concerned made our life considerably easier through their genuine interest and support of our work. Gratitude is extended to Simon Hebditch of CAF who provided thoughtful advice throughout the lifetime of the Campaign. The NCVO also provided financial support and Stuart Etherington and Campbell Robb provided wise counsel throughout. As mentioned before, the support of 30 of the top 50 charities in making financial contributions to the Campaign has been instrumental to our success. Additional advice and input was also provided by these and many other charities.

The strategy was formulated in two business plans – the over-riding theme of the second plan was continuity with the first. Much thought was given to strategy in the early stages of the Campaign, ensuring efficient execution of these projects during the later stages.

The governance of the Campaign facilitated quick decision-making, and allowed the Campaign team to progress activity without unnecessary delay.

The team itself was drawn from a wide range of backgrounds – HM Treasury, the Inland Revenue and the Department for Education and Skills provided civil service secondees. Macmillan Cancer Relief, Help the Aged, British Red Cross and NCH provided secondees from the voluntary sector. The Campaign drew in press and PR professionals, event managers and fundraisers.

The Campaign has also benefited from having a Chair, Lord Joel Joffe, who as a former Chair of Oxfam, an experienced business leader and member of the Lords, commanded respect. Joel understands the voluntary, commercial and Government sectors and his passion and integrity added greatly to our success.

Appendices	Page
Appendix i: Funding partners	22
Appendix ii: Income and expenditure	23
Appendix iii: Published materials	24
Appendix iv: Business champions	28

Appendix i: Funding partners

ActionAid
 Action for Blind People
 BBC Children in Need
 British Heart Foundation
 British Red Cross
 Cancer Research UK
 Christian Aid
 Diabetes UK
 Guide Dogs for the Blind
 Help the Aged
 I CAN
 Jewish Care
 Leonard Cheshire
 Macmillan Cancer Relief
 Marie Curie Cancer Care
 Mencap
 Multiple Sclerosis Society
 The National Trust
 NCH
 NSPCC
 Oxfam
 Plan UK
 Prince's Trust
 Royal National Institute of the Blind (RNIB)
 Royal National Institute for the Deaf and hard of hearing (RNID)
 Royal National Lifeboat Institution (RNLI)
 The Royal Society for the Protection of Birds (RSPB)
 Salvation Army
 Save the Children
 UNICEF
 WWF UK

Appendix ii: Income and expenditure

	Outturn 2001-02	Outturn 2002-03	Outturn 2003-04 (provisional ¹)
Income			
Inland Revenue	1,012	1,000	1,000
CAF	100	100	100
NCVO	50	25	25
Charities	205	48	28
Other	0	44	90
Carry over	0	190	240
Total	1,367	1,407	1,483
Costs			
Staff	182	266	314
General	120	85	97
Research	69	53	52
Promotion & PR	71	208	66
Stream 1	5	26	22
Stream 2	518	147	124
Stream 3	68	64	82
Stream 4	93	276	235
Scotland/Wales	0	42	97
Total	1,126	1,167	1,089

The Campaign has also received support in the form of:

- free accommodation from the Inland Revenue;
- secondments from the Inland Revenue; HM Treasury, Department for Education and Skills provided civil service secondees. Macmillan Cancer Relief, Help the Aged, British Red Cross and NCH provided secondees from the voluntary sector;
- funding for its running costs between 1 April and 30 June 2004 from Inland Revenue (£157,500), CAF (£14,000) and NCVO (£3,500);
- gifts of office furniture provided by the Inland Revenue.

¹ Based on a cash income and expenditure account for the twelve months ended 31 March 2004. Total expenditure for 2003-04 is forecast at £1,214,000 leaving a carry over of £269,000. The carry over will be used to finance Giving Nation and the charity financial products programme.

Appendix iii: Published materials

Research reports

The Giving Campaign published a series of eight research reports, they include:



1. **Advice worth giving?** – A summary of a MORI survey on the role of financial advisers and related professionals in providing client advice in charitable giving, October 2001.



2. **Giving Nation** – A summary of an NOP survey examining attitudes to charity and giving by secondary school pupils and teachers, June 2002.



3. **The future of giving?** – A study of the potential market for planned giving products in the UK, July 2002.



4. **Giving at the office** – A summary of NOP research into perceptions and understanding of Payroll Giving amongst high earners, August 2002.



5. **A giving relationship?** – A summary of MORI research into recruiting and developing high value supporters, May 2003.



6. **Charity financial products** – A new approach to giving, September 2003.



7. **A wealth of opportunity** – A summary report of NOP research evaluating how the affluent decide the level of their donations to charity, March 2004.



8. **Giving good advice** – A summary research report about the role of financial services professionals in providing client advice on charitable giving, April 2004.

Other research reports published by the Campaign, include:



- Gift Aid Research Report** – An nfpSynergy research report identifying what can be done to market Gift Aid more effectively to donors, February 2004.



- Share Giving Research Report** – An nfpSynergy research report into charities' attitudes towards Share Giving, February 2004.



- The Business of Giving** – A summary report revealing the business benefits of Payroll Giving, October 2002.



- Smart Research Report** – A research project to find out what donors think of Gift Aid, June 2001.

Guides for charities



Sponsored Event Best Practice – A guide for charities wishing to boost sponsorship donations with Gift Aid.



Make Giving Go Further – A Fundraiser's Guide to Tax-Effective Giving.



Fundraising and Trustees: The Essential Guide – A comprehensive guide for trustees, covering what they need to know about fundraising and tax-effective giving.



Gift Aid Toolkit for Charities – A comprehensive toolkit, providing full guidelines for use of Gift Aid and containing the branding and logos.



Making Giving Go Further: Toolkit & Trainer's Pack – A complete trainer's pack and toolkit on tax-effective giving.



Opening Doors for Charities – A guide to help charities work together, building community partnerships to target local businesses for Payroll Giving income.



Gift Aid & Sponsorship Donations (for Charities) – A leaflet providing information for charities looking to boost sponsorship donations with Gift Aid.



Share giving pack – A guide for charities and donors on the benefits and practicalities of donating shares to charity.



506 Million Reasons to Make the Most of Tax-Effective Giving – A tax-effective giving leaflet for fundraisers.



Gift Aid – A practical guide to Gift Aid for charities.

Guides for donors



Give Shares to Charity and Cut Your Tax Bill! – A Share Giving leaflet for donors explaining how to give shares to charity.



Tax-Effective Giving Guide for Donors – A guide to tax-effective giving.



Inland Revenue Mailing Leaflet – A leaflet introducing the tax-effective giving methods for donors.



Share Giving Guide – A guide to giving shares to charity.

Guides for professional advisers



Guide for Finance Professionals – Making Gifts Go Further? – A guide to tax-effective giving, produced in partnership with the FSA, for financial advisers.



Charity Financial Products – An exploration of the charity financial product marketplace in the UK.

Guides for businesses



How to Make a Success of Payroll Giving – A guide to show employers how they can achieve a high level of staff participation in Payroll Giving.



Payroll Giving Toolkit for Businesses (over 500 employees) – A toolkit for larger companies with information about how to set up and promote Payroll Giving.



It Pays to Give – Toolkit for SMEs – A toolkit for small and medium sized companies looking to set up and promote Payroll Giving.

Donation forms



Gift Aid Declaration Form – A model declaration form for Gift Aid.



Model Gift Aid Sponsorship Form – A model sponsorship form to help charities claim back Gift Aid on sponsored events.

Welsh materials (Available in Welsh/English)



Gift Aid – Made Easy – An information pack for treasurers, fundraisers and charity trustees in Wales.



506 Million Reasons Why You Should Make the Most of Tax-Effective Giving (Welsh) – A tax-effective giving leaflet.



Tax-Effective Giving for Charities – An introduction for charities to tax-effective giving.



Share Giving Guide – A guide to giving shares to charity.

Miscellaneous



Summary Strategy & Business Plan 2001 – A report outlining the strategy for The Giving Campaign from launch in 2001.



Summary Strategy & Business Plan 2003-2004 – A report detailing the Campaign strategy for 2003-2004, reviewing Campaign activities since launch in 2001.

Appendix iv: Business champions

The Giving Campaign is pleased to publish a list of companies that have committed to, or already reached, the 10% target for employee participation in Payroll Giving. They are:

3i Group Plc	Cable & Wireless Plc	Rolls Royce Plc
Abbey Plc	Cambridge Water Plc	Royal & SunAlliance Plc
Alliance & Leicester Plc	Centrica Plc	Royal Bank of Scotland Plc
AstraZeneca Plc	Deloitte and Touche	J Sainsbury Plc
BAE Plc	Diageo Plc	Scottish Power Plc
Barclays Bank Plc	Exel Plc	St. James's Place Plc
British American Tobacco Plc (BAT)	Friends Provident Plc	Standard Chartered Plc
BBC Broadcast Ltd	Gallagher Group Ltd	Tesco Plc
British Nuclear Fuels plc (BNFL)	Hilton Group Plc	Thames Water Plc
British Airways Plc	Kelda Group (Yorkshire Water) Plc	United Utilities Plc
British Sky Broadcasting Group Plc (BSkyB)	KPMG	Vodafone Group Plc
British Telecommunications Plc	Lloyds TSB Bank Plc	Whitbread Plc
British United Provident Association Ltd (BUPA)	Prudential Plc	Zurich Financial Services
	Reuters Group Plc	

The Giving Campaign Committees and Campaign Team

Executive Committee

Lord Joel Joffe (Chair) – Chair, The Giving Campaign
Stephen Ainger – Chief Executive Officer, CAF
Stuart Etherington – Chief Executive Officer, NCVO
Simon Hebditch – Executive Director of External Affairs, CAF
Campbell Robb – Director of Public Policy, NCVO
Marjorie Williams – Director of SDS, Inland Revenue

Advisory Committee

Lord Joel Joffe (Chair) – Chair, The Giving Campaign
Stephen Ainger – Chief Executive Officer, CAF
Lord Bhatia – Chair, Ethnic Minority Foundation
Lindsay Boswell – Chief Executive, Institute of Fundraising
Professor Ian Bruce – Director of VOLPROF, City University
Julia Cleverdon CBE – Chief Executive, Business in the Community
Stuart Etherington – Chief Executive Officer, NCVO
Simon Hebditch – Executive Director of External Affairs, CAF
Thomas Hughes-Hallett – Chief Executive, Marie Curie Cancer Care
Viscountess Mackintosh of Halifax – Chief Executive, ShareGift
Lord Phillips of Sudbury – Founder, Bates, Wells & Braithwaite
Marc Phillips – Director of BBC Children In Need, Wales
Campbell Robb – Director of Public Policy, NCVO
Neil Sherlock – Partner, Public Affairs, KPMG
Christopher Spence MBE – Chief Executive, Volunteering England
Marjorie Williams – Director of SDS, Inland Revenue
Andrew Vereker, HM Treasury
Michael Wilson – Chief Executive, St James's Place
Sir Nicholas Young – Chief Executive, British Red Cross

Research Group

Professor Ian Bruce (Chair) – Director of VOLPROF, City University
Cathy Pharoah – Director of Research, CAF
Susan Wainwright – Research Officer, NCVO
Catherine Walker – Head of Research, CAF
Karl Wilding – Director of Research, NCVO
Jackie McGeehan – Policy Adviser, Inland Revenue

Giving Nation Steering group

Lindsay Boswell (Chair) – Chief Executive, Institute of Fundraising
Lindsey Bailey – Press & Website Manager, Giving Nation
Paul Barnes, former Deputy Head Teacher, Brine Leas School, Cheshire
Tony Breslin – Chief Executive, Citizenship Foundation
Beth Breeze – Consultant Fundraising Researcher
Amanda Delew – Director, The Giving Campaign
Bo Emecheta, Policy Adviser, DfES
Sam Gammans, Policy Adviser, ACU, Home Office
Peter Gilheany – Account Director, Geronimo PR
Peter Hayes – Director of Education, Community Service Volunteers
Carolyn Holcroft – Campaign Manager, Giving Nation
James Layfield – Managing Director, Virgin D3
Campbell Robb – Director of Policy, NCVO
Martina Milburn – Chief Executive Officer, Prince's Trust (formerly BBC Children in Need)
Julie Stuart-Thompson – Community Manager, Davison High School, Sussex
Moira Swinbank – Chief Executive Officer, Timebank
Rachael Takens-Milne – Development & External Relations Manager, Citizenship Foundation
Andy Thornton – Director, Giving Nation

Charity Financial Products Working Party

Brian Thomas (Chair) – Former Finance Director, Zurich Financial Services
Phillip Mind (Secretary) – Associate Director, The Giving Campaign
Peter Emms – former Marketing Director, Allied Dunbar
Graham Hooper – former Business Development Director, Charcol Holden Meehan
John Pemberton – former Head of Business Development, Prudential Corporation
Kevin Ronaldson – former Marketing Director, Zurich Financial Services
John Warburton – Head of Products & Marketing, Halifax Financial Services

Campaign Team

Carrie Adams	Ian Catley	Peter Gilheany	Mike Hornby	Anna Quayle
Lindsey Bailey	Sasha Chisholm	Lucinda Gould	Jackie McGeehan	David Roe
Jonathan Brown	Penny Clover	Louise Graymore	Phillip Mind	Guy Simpson
Terry Bryan	Neville Dack	Terri Hathaway	Esther Murray	Andy Thornton
Brenda Campbell	Amanda Delew	Carolyn Holcroft	Andrew Peel	Simon Williams



Until 30 June 2004 you can contact **The Giving Campaign** at:

6th Floor Haymarket House
1A Oxendon Street, London SW1Y 4EE
Tel: 020 7930 3154 Fax: 020 7925 0985
Email: admin@givingcampaign.org.uk

Thereafter visit our website at www.givingcampaign.org.uk