



Be your own
charitable foundation



What is GivingWorks?

GivingWorks is a UK-registered charity that exists to act as a support organisation for individuals, groups of people or companies who want to carry out their own charitable projects or support other good causes. Our job is to help you achieve as much as possible with your money.

Donations made by individual UK taxpayers benefit from full charitable tax relief so long as the project you are supporting is charitable – whether or not the cause you are supporting is itself a charity, and whether or not it is based in the UK. And GivingWorks also offers you a complete administrative and reporting service, leaving you free to concentrate on your involvement with your chosen cause.

Is it time you became a charitable foundation?

Millions of people support good causes, and many of them use Gift Aid to make sure their chosen causes benefit from a 25% bonus. But some people – acting as individuals, as members of groups or in their business lives – reach a point when that is not enough.

You may want to provide ongoing support for a cause. It may be a cause which you have initiated yourself. You may want to support a number of different causes. And you may want to support causes, whether inside or outside the UK, that are not registered charities and so do not qualify for Gift Aid tax relief – which would normally mean that the value of your contributions is greatly reduced.

When you reach any or indeed all of these points, it's time to move your giving onto a better-organised, more structured basis.

If you were Bill Gates or Nelson Rockefeller, you would establish your own Foundation. But for those giving rather less than these billionaires, that has always been an unrealistically complex and expensive option.

That's exactly where GivingWorks comes in. GivingWorks provides the umbrella support that effectively enables you to set up your own charitable foundation, with minimal cost and hassle. You can say what you want to happen to your money. And you're always free to decide whether you want to change the aims or direction of your Foundation, close it when it has run its course or leave it to run indefinitely into the future as part of your legacy.

All contributions into such a foundation by UK taxpayers qualify for Gift Aid tax relief, currently 25%. And as a higher-rate taxpayer, you can claim the difference between the basic rate of tax and the higher rate on all your contributions.

If you are serious about your philanthropy, you will appreciate the way that Giving Works offers you an affordable alternative to a full-scale charitable foundation. To help you understand its power and flexibility, on the following pages you'll find three real and current stories of people who have used GivingWorks to provide them with the infrastructure they need to support their particular causes.



Marlena Hellebo's story



“Ex animo” is a Latin expression that means “from the heart,” and looking back at the origins of Marlena’s Ex Animo Foundation, established back in 2003, it’s easy to see why she chose the name. Quite simply, the poor and needy children she met at a centre in India touched her heart.

The cause

The foundation’s story began with Marlena’s first visit to Udavum Karangal, a centre for needy and destitute children in Chennai, India. Through her Foundation, Marlena has supported the centre ever since. But at the same time, she could also see the need to take on a bigger and broader role – generating publicity to help raise funds not only for this centre, but also for the many others struggling to look after destitute and orphaned children in India and Africa.

The project

To take on this huge task, Marlena has turned to film and, in particular, to independent film-maker James Goldcrown. Part-funded through her Foundation as well as other film bodies, James’s moving film *To Die No More*, about the lives of children in a hospice in South Africa with HIV/AIDS, has been screened at many festivals and events, and broadcast on cable television. It has won two major awards, but more importantly has also helped to raise both public awareness and a very large amount of money.

The results

With a good deal of practical advice and assistance from GivingWorks, Ex Animo Foundation has now made two films, and Marlena and James have been back to South Africa recently to distribute funds raised and to do more research into the continuing need for antiretroviral drugs. “It is no exaggeration to say that my Foundation could not have succeeded without GivingWorks,” Marlena says. “Thanks to the tax relief I was able to obtain, the film-making money went 28% further.”





Jim and Sue Cannon's story



Jim Cannon is a management consultant who specialises in organisational behaviour. Together with his wife Sue, he has created a Foundation to fund the education of hundreds of children in one of the poorest regions of India.

The cause

In 1999, he and his wife Sue were sent out to India to offer advice to a struggling Christian charity. On one trip he went to Bihar, a remote state some 17 hours from Kolkutta, where, somewhat to his surprise, he was invited to open a new school that had just been completed. While he was there, he heard an old man say that he could now die happy, because his grandchildren would not now grow up illiterate as he and his sons had done. With this, Jim and Sue knew they had found their cause.

The project

Creating their own Foundation under the GivingWorks umbrella and raising money tirelessly, Jim and Sue were able to build another school in a nearby village, which opened in 2005. Since then, with continuing support from the Foundation, it has provided an education to 120 children. But the environment in this region can be hostile, and in late 2009 a cyclone devastated the area and the school was badly damaged: Jim and Sue had to redouble their efforts and raise new funds, and within a few months it was rebuilt and re-opened.

The results

"You can't put a value on a project like this," says Jim. "It is quite simply the most worthwhile and important thing we have ever done, or ever will do. It is particularly important to us to know that by providing funds through our Foundation, we have been able to endow our school indefinitely, and it will continue its vital work long after we have gone."



Gary and Rachael Tuffield's story



Determined to take something positive from the terrible personal tragedy of losing their son Oscar during his birth, Gary and Rachael founded The Oscar Foundation in March 2010 to do as much as they could in his memory.



The cause

The Oscar Foundation reflects Gary and Rachael's belief that life is about opportunity – and the reality that life doesn't always offer much opportunity to children. Gary and Rachael are committed to helping build better lives for children both in the UK and in the developing world.

The project

Working with GivingWorks, the Foundation aims to provide services and necessary equipment for sick and homeless children – from state-of-the-art medical technology, to emergency funding for life-saving treatment, to much-needed homes for those left abandoned in the streets.

The results

In its early stages, the Foundation has raised over £50,000 through a wide range of fund-raising activities, with many more planned for the future. Gary and Rachael are involved in discussions with providers of care from local children's hospices in Kent to a church organisation in North East India with the aim of building an orphanage. Rachael says: "Through Gary's work, we've known GivingWorks for some time and admired the energy they put into getting people involved. Put that together with our own complete determination and commitment, and I'm quite certain that The Oscar Foundation will make a real difference."

How GivingWorks works

A charitable foundation set up through GivingWorks is what we call a micro-trust, for which GivingWorks also provides the trustees. Within your micro-trust, you have your own charitable fund which can grow with further contributions from friends, family, colleagues, employers and employees. All contributions by individual UK taxpayers enjoy the full benefits of Gift Aid.

You choose where you want to donate your money, whether you wish to support one or more existing causes or to create a new cause where you see need and which no existing organisation currently meets. Provided that you are able to win the approval of your trustees (which basically means demonstrating that your project is charitable), there are no restrictions on the nature or location of the causes you can support.

Meanwhile, GivingWorks also takes on the administrative burden that comes with setting up a charity, removing the need for you to worry about registration and financial reporting.

And GivingWorks' support services go much further than this. Whatever the issues and challenges your own cause faces, we've almost certainly come across them before and if we don't know how to deal with them we'll know someone who does. Our job is to help you make sure you achieve as much as possible with your money.

GivingWorks for businesses

Companies of many shapes and sizes turn to GivingWorks for help. In the same way individuals can become their own charitable foundation, GivingWorks can work equally well when a company wants to structure its charitable giving more effectively.

GivingWorks has experience of working with company owners and their employees to:

- > Align charitable aims with company values and strategy
- > Engage senior employees in transformational projects
- > Open GivingWorks accounts for team members

Please contact GivingWorks for a free initial business consultation.

A simple 5-step process

Creating and managing your own charitable foundation takes just five steps.

1 Planning

- > Complete the pre-sign up form at the back of this brochure to set out the objectives for your foundation and send it to us
- > Remember you can set up your Foundation as a short-term project, or as a life-long commitment
- > GivingWorks will discuss and agree these charitable objectives with you before we proceed.

2 Establishing

- > Complete the Micro-Trust agreement, including the Gift Aid declaration
- > Make your initial donation by cheque or bank transfer
- > GivingWorks will claim Gift Aid on donations made by UK taxpayers at the basic rate and add it to your fund. This means that for every £1000 you pay in, a further £250 (£280 until April 2011) can be added through tax relief. Note that you can still claim Gift Aid even when your donations are not going to registered charities
- > If you are a higher-rate taxpayer you can claim the difference between the basic rate and your higher rate on all donations.



3 Funding

- > Your set-up fee of £500 and your first ongoing management fee is payable to GivingWorks at this stage
- > Other people can also make donations into your Foundation and claim Gift Aid. If you're an employee, your employer may be willing to match your payments – tax relief is available for companies too.

4 Support

- > GivingWorks will help you check the validity of any cause you want to support from your Foundation
- > If you need any other kind of help to do with your philanthropy – legal advice, business advice, practical advice, advice on working in distant parts of the world – we'll usually be able to find what you need, or point you in the right direction.

5 Management

- > We'll give you Fund Transfer Forms so that you can make donations to your chosen causes
- > During the life of your Foundation we'll keep you fully up-to-date, with comprehensive financial reporting
- > If your Foundation has a fixed end-date, we will arrange to meet and discuss winding up your micro-trust.

What to do next

If you're interested in GivingWorks and setting up your own charitable foundation, have a look at our website www.givingworks.org.uk or to discuss the information in this brochure or any other questions you may have, please call us on 0845 362 8425, or email info@givingworks.org.uk

You can also write to us at;
Dixon House, 72 -75 Fenchurch Street, London EC3M 4BR.

We look forward to hearing from you.

