



THE
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Fundraising Toolkit



Introduction

Raising money for charity is one of the most rewarding things you can do. This toolkit will help you run any fundraising you want to do at the University, suggests effective planning techniques for best results, and provides the answers and resources you may need.

Before You Start Fundraising

Use this toolkit with the [Event Management Training](#) to help you plan your fundraising event. Staff in the relevant Students' Union (SU) department will support you through the process.

The Event Management Training will have information on how to:



Recruit Your Team



Create Your Budget



Write Your
Risk Assessment



Publicise Your
Event/Tickets Sales

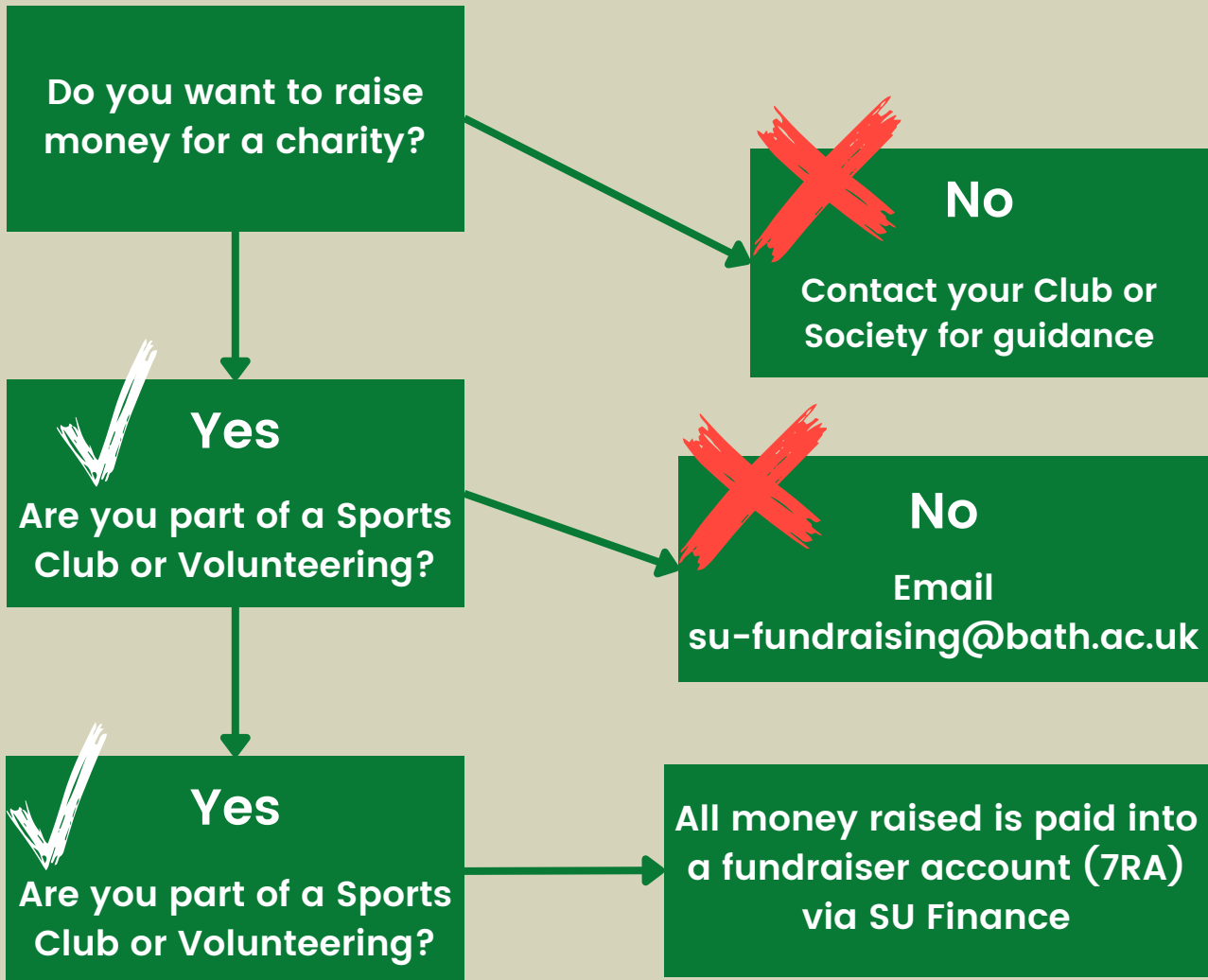


Manage A Timeline



Evaluate The Event

Student Fundraiser



If you have an idea for a fundraising event we can help, just complete an [Event Planner](#). This takes you through the stages of creating a successful event and getting support and necessary agreements from the SU. Or if you would like to chat through your idea please email us at su-fundraising@bath.ac.uk or come in and see us in the Volunteering Office.

The Law

(and why RAG must be involved)



The Students' Union must be made aware of all fundraising activity undertaken as part of the SU. Our charitable status means that by law, student groups cannot fundraise for anyone other than themselves or the SU, unless transactions and costs associated with your fundraising event will need to go through the appropriate SU Finance account.

Fundraiser Account Codes

Sport Groups use RAG 7SA

Societies use RAG 7SO

Volunteer Groups use RAG 7FE

If you don't fall under any of these categories please contact us directly at su-fundraising@bath.ac.uk. The profits from your event will then be paid to your nominated charity, which must be approved by the SU Volunteer Office before the event.

These regulations do not include raising money specifically for your club, society or group.

The Charity

Which charity are you fundraising for?



The charity you wish to support needs to be both a UK registered charity and approved by the SU Management Team. Please do come and talk to the SU Volunteer Team if you are not sure.

The benefitting charity must have a UK registered charity numbers and an associated bank account.

The SU will consider the principal purpose and activities of the charities supported by student fundraising.

A list of charities supported through fundraising will be compiled annually by the Volunteering Team.

If you need clarification on whether you are fundraising for a charity or your student group, please contact us at

su-fundraising@bath.ac.uk



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SU staff

SU staff supports students to fundraise for charity.

Table Bookings:

You can book stall space on the Parade, in the SU or just outside the main SU entrance to sell crafts, run a competition, raffle or cake sale.

SU Staff can help you with:

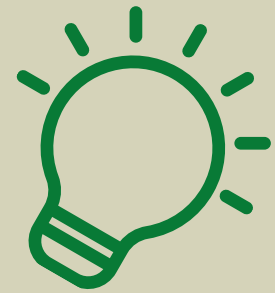
- Budgeting
- Ticketing
- Marketing and publicity
- Banking
- Charity Law and good practice
- Fundraising equipment, resources and materials
- Provide card readers
- Choosing charities
- Event management
- Sponsorship
- Health and Safety advice, insurance and risk assessment
- Online fundraising
- Collection permits
- Volunteer recruitment



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Fundraising

Our Top Tips



Start planning early

Ideally plan your event at least six weeks ahead to give you plenty of time to book the right venues and raise money for your charity.

Be confident

Donations can take time to raise but your hard work will be worth it: people can be surprisingly generous.

Check in

If you have an idea come and check in with SU Volunteering. Any events involving food, physical challenge or potential risk can be considered and we can then support you with risk assessments, disclaimers and additional insurance or check against policies.

Know the facts

Make sure you can tell people about the event: if you can chat about what you're doing people will be more inclined to donate. Practice your 'elevator pitch': this is a one minute speech about what you are doing, who for and why it is such a good cause.

Know the charities involved

Tell your donors where their money is going. Research the charity involved so that when people ask you can tell them where their donation will be going and who they will be helping. Specific information and stories which bring alive what you are doing will help you to raise more for your cause.

Use your contacts

Tell your family, friends and colleagues about what you're doing – the people who know you are your best starting point for donations.



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Fundraising

Our Top Tips-Continued



Use your USP

What is your Unique Selling Point for fundraising? Can you play an instrument or are you a great baker? Coming up with a creative idea or using a unique talent can give you an edge as a fundraiser.

Maximise donations during the event

People will be really motivated to give as your event is happening. Make sure to plan several calls during the event and soon afterwards.

Set fundraising goals and mini goals

Set a target, review and extend this if you are reaching it early on. If you have an ambitious target break it down in to smaller amounts and plan when you want to reach each amount.

Follow good fundraising practice

The SU Fundraising team can advise you and help ensure that your fundraising is operating along good practice guidelines. This includes making sure that your money gets safely to your charity.



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Our Top Tips-Continued



Use external companies

Try and use the expertise of companies who deliver events such as bungee jumps, abseils, etc. This is really good practice as the company will be covered by their own public liability insurance, should have a risk assessment in place and know how to run events. This will save you time planning and enable you to offer an exciting event.

Use online fundraising

The SU use Enthuse as our online platform for fundraising – this provides an easy way for people to donate and you can link your page to social media to promote your event. You use Enthuse instead of sites like Just Giving or GoFundMe as it helps to ensure the money goes directly through fundraising accounts and no tax is charged which means all of the money you raise will go directly to your chosen charity!

You will need to set up your campaign under Bath RAG (Raise & Give) to ensure we can receive your donations – you can ask us to help you with this. You need to specify Bath RAG as your charity and then give a clear description of your event so that the SU knows where to donate your profits. This is important in following charity law as it relates to the SU.

You can set up your fundraising campaign depending on whether you are a sports club or group:

Sports Club fundraisers: [Sign up \(enthuse.com\)](https://www.enthuse.com).

Student Group fundraisers: [Sign up \(enthuse.com\)](https://www.enthuse.com).

If you have any questions about setting up a page email su-fundraising@bath.ac.uk



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Things To Avoid



Pressurising potential supporters

Don't worry if people say 'No' and don't ask twice. Not everyone is going to want or be able to give. Even if they do not donate you have raised awareness of your charity.

Please note:

Anyone fundraising at an event is representing The SU. Please be mindful of this and remain positive and polite when meeting other students, staff and the local community.

Important note about insurance

Your event will only be insured if SU staff are aware of and approve the event – otherwise your event is not covered. If fundraising off-campus, SU staff need to get approval from the SU insurance company. To do this we need to submit your risk assessment and activity information. For further details contact su-fundraising@bath.ac.uk



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Fundraising Ideas



Large events

Bath's Got Talent, murder mystery, charity ball, sports tournaments – lecturers vs students, club nights, sky diving, abseiling.

Medium events

Film nights, Bake offs, Come Dine with Me, University Challenge, quiz nights, speed dating, bingo, charity lectures, sponsored events such as head shaving, no makeup.

Endurance events

Rowathon, swimathon, danceathon, gaming/film marathons.

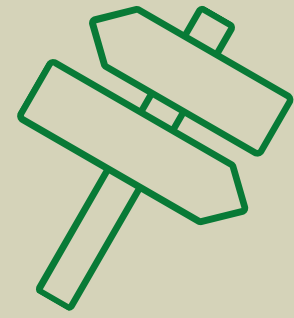
Smaller events

Helping hand – dog walking, gardening, etc, tombola and raffles, fancy dress cash collections, Amazon and eBay sales, supermarket bag packing, busking, sponging/gunging your committee/lecturer.

Can we get sponsorship?

Absolutely, but do let the SU's Marketing team know as they can support you to complete a sponsorship proposal, cross check against sponsors for other groups, deal with contracts and invoicing and ensure you get the most from your sponsorship arrangement.

Good Practice Guidelines



Can we run a raffle or lottery?

Yes you can, but as raffles and lotteries are regulated by the Gambling Commission you would usually need a licence. However, some types of lotteries are exempt including incidental lotteries which could apply to your event if the lottery is only promoted for charitable causes and not run for commercial gain.

To comply:

- Raffle tickets can only be sold at the location and during the event
- The draw would take place during the event, and not rollover
- Deductions from the profits going to good causes would not exceed £100 for costs and £500 in prizes.

Societies and groups can also run private raffles for their own members or as one-offs at a single event without needing a licence.

Alternatively see:

bathnes.gov.uk/services/business/licences/gambling/lotteries

How Do We Get Money To The Charity?



Collecting money

If you would like to ask for donations on private property you will need permission from the property/land owner. It is a good idea to keep a record of this correspondence. If you are busking or collecting money in a public place then you will need a permit from the local council.

Banking the donations from your event

Charity money must not be banked into a personal bank account. We recommend that money is banked the same day and that you do not walk around with money on you, for your own safety: money taken home is not covered by SU insurance. Please complete a yellow finance form highlighting the amount you are donating to your charity. This will ensure that the Finance Department will pay the profits to the charity via the correct, legal process. The Fundraising Co-ordinator, can sign this form to authorise the process.

Drop-safing

Come and speak to us about drop-safing – this is a simple system which enables you to bank your money safely even when the SU Finance Office is closed.

Event income

Proceeds vs profits?

It is important to understand the difference between proceeds and profits, which apply to your event and to state this clearly on your publicity/tickets. Proceeds are all the money raised during the event. Profits are the money remaining after all the costs of the event are paid.

- If you have stated on your publicity/tickets that 'all proceeds go to' then all money raised must go to the charity regardless of whether your event costs have been paid.
- However, if you have said that 'all profits go to' then any money remaining after the event costs have been paid go to the charity.

Proceeds:

All money that comes in will go to the charity or cause

Profits:

The money raised minus your costs go to the charity or cause

Stating that all profits will go to the charity enables you to run your event without losing out financially.



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Further Information



Further information and support

The SU holds Event Committee meetings to support you with higher risk events and will check over your risk assessment, give financial advice and guide you through the planning stages. If your event exceeds 200 people, expenditure is over £2000 or personal safety may be at risk you will be invited to attend an Event Committee meeting to chat through your plans. Do come and chat with us or your support staff member for more details.

If you would like to speak to a fundraising staff member please email su-fundraising@bath.ac.uk or come in and see us in the Edge Offices on Level 2 of the Edge



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