

Welcome to the Charity Service



We have been a registered charity since September 1990 although our origins go back to 1924. We have built an excellent reputation for providing high quality, personalised services to charities and donors to make the most of their gift. Our aim is to help support a vibrant and sustainable third sector by providing assistance and expertise to make the most of gifts and donations, government incentives and the distribution of funds. We have excellent partner relationships with other charitable organisations and business networks.

We have an expert Trustee Board and a small team of experienced staff who offer a personalised and bespoke service. We aim to provide a tailored "One Stop Shop" for your requirements. This portfolio includes : Online Donating, Charity Voucher Accounts, Payroll Giving Services, Corporate Trusteeship, Charitable Trusts, Will and Inheritance Services, Grant Administration and Distribution, Governance Administration and Corporate Social Responsibility Planning.

Taking advantage of technology, we are a virtual organisation so our running costs are very low and efficient. As a charity we seek to deliver secure, cost effective, up to date and relevant solutions to charities and donors. We aim to cover our costs each year and to remain sustainable, rather than to accumulate reserves. Our fee structure is competitive and flexible.

Please do contact us for further information about the services contained within this pack or if you have any queries about any other support we can offer you please get in touch on 0303 999 1212 and choose option 4.

Catherine Stuart-Jervis MA
Chief Executive

The Charity Service Limited

Third Floor, 64 Bridge Street, Manchester M3 3BN • Telephone: 0303 999 1212
enquiries@charityservice.org.uk • www.charityservice.org.uk

Registered charity No: 1011293 Company limited by guarantee in England & Wales No: 2538910

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Catherine Stuart-Jervis has worked in the third sector for over 25 years managing a variety of charitable organisations. Catherine has worked both in infrastructure and front line charities including The Rural Deprivation Forum, Age Concern and most recently the British Red Cross. She has broad experience of charitable governance and administration. In addition to her work with The Charity Service, Catherine holds a senior Non-Executive position within an NHS Trust and is appointed as an NHS Ambassador for Equality and Diversity for the Cabinet Office.

Welcome to The Charity Service

Payroll giving

Payroll giving is a cost effective way for individuals who are paid through PAYE to give to their favourite charity. It's easy to give and you even get 20%* from the tax man too. Top rate tax payers see significant benefits in giving through their pay. Provided your employer has a scheme in place with an approved payroll giving agency, a donor simply completes a joining form. The joining form gives the company the authority to make a deduction from his/her pay and it tells the agency which charity the donation has to go to.

Our experienced team provides a speedy service of processing and distribution to the chosen charities of the individual donors through their business payroll scheme.

An individual can, if they wish, accumulate their donations in a charity cheque account, enabling them to make periodic charitable donations as and when they choose.

We offer talks to management and staff without any bias for a particular charity, simply explaining the merits of the scheme and the effect of these donations for the smaller charities. We are also able to provide companies who are interested with information about local charity projects in their area which staff and companies may wish to assist.

We also work with charities' corporate donors to discuss the advantages of introducing a scheme (with no set-up charges), and facilitating the use of a sole employee for any staff-wide fundraising activities.

We are introducing two new services; **SMALL CHANGE = BIG CHANGE**, a new service within payroll giving. This will allow employees to contribute the odd pence from their pay each month to a Staff Group voucher account, from which they can give grants to community charity projects, and **Happy Hour**, a new way to make a difference. By donating just one hour's pay at the end of the year, this will make a large difference to a small charity.

For more information please contact - Linda Ryan on 0303 999 1212 and choose option 2.

**20% unless you are a top rate tax payer and then you get immediate tax relief at whatever rate you pay*

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Linda Ryan Business Services Manager



Linda has over eleven years' experience of dealing with the many and varied queries of our clients and the public. Specialising in payroll giving, she enjoys presenting the benefits of our schemes to companies and staff. She is happy attending events and presenting our range of services to potential users.

With a background in the print industry, she made a career change 11 years ago to begin work with The Charity Service. Having spent many years as a charity volunteer at grass roots level, she is aware of the need all charities have to raise funds for their good causes.

Linda loves swimming and finds it a good way to start her day, but it's her grandson that keeps her on her toes.

Charity cheque accounts & gift-aid

Accounts are available for individuals and companies who wish to give regularly to charities without the need for them to keep extensive records of their charity giving.

Individuals give a donation to the Charity Service and we collect the tax from HMRC on this gift*. The total amount including tax is then held for the account holder in a charity cheque account for them to distribute to charity. Account holders then give to their chosen charities using either a charity cheque book or our online service. We can even check the status of a charity if you are unsure.

The Charity Service checks the status and validity of all charities to which it sends funds on behalf of our clients and this is checked using our links to the Charity Commission. Our experienced team provides a speedy service of processing and distribution to the chosen charities.

We are also working with a number of local charities who need funds for small projects and our account holders will be able to access this information should they wish to help more local organisations.

We are now offering cheque accounts for special occasions such as birthdays, anniversaries, christenings, Bar & Bat mitzvahs. These can be funded through monetary gifts from a number of donors but are not eligible for gift aid.

In Memoriam accounts are available for families who wish to put together donations in a fund for distribution to charities in the name of a loved one. These donations are eligible for gift aid if appropriate details are given*.

For more information please contact - Linda Ryan on 0303 999 1212 and choose option 2.

**provided we are in possession of a signed Gift Aid Declaration and Indemnity Form, we can claim the standard rate of tax only (higher rate tax payers will need to claim the difference through their tax return).*

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Charity cheque accounts

Trust management



We work with individuals and businesses in carrying out our charitable and educational activities both in the UK and overseas. Using our administrative systems, tax status and compliance processes for Trusts, this leaves donors free to concentrate on their charitable cause knowing assurance matters and administration are taken care of.

We also have services that can enable grant making through Trusts and our Grant Approval Panel(s) can help manage the administration, compliance and distribution of funds. We have excellent contacts into the community and voluntary sector and are able to advertise widely should you require applications to be sought from appropriate groups and organisations to support your Trust objective.

We also administer smaller Trusts, often at the invitation of professional firms and wealth managers, where we provide a bespoke, expert, economical and assured service.

As custodians of our own investments and those of other charities of which we are Trustee, we are experienced in developing and implementing investment policies and in finding the right home for charities' money. Our experienced Trust Management Committee oversees substantial sums and arranges for its effective management and ongoing monitoring. This is a role we are happy to take on for other charities without the necessary skills or resources, or for those who simply want to benefit from the cost advantages of working alongside us.

Please contact - Anthony Greaves on 0303 999 1212 and choose option 1.

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Anthony Greaves MAAT Operations Manager

Joined the Charity Service in June 2007. Anthony is a qualified AAT member and former Branch Chairman.

Anthony has worked in finance for over thirty years covering accountancy practice, at Grant Thornton in Bradford and Ernst & Young in Leeds, and in industry at Thomas Wright/Thorite Group Ltd. Anthony has worked for many years in the sector starting his third sector working life at the National Library for the Blind.

Anthony has been a volunteer in the scout movement for 20 years, being a warranted leader for more than 15 years. His interests include kayaking and hill walking.



Trust management

Wills and estate planning

Many people wish to make gifts to charity in their Wills. Such gifts are exempt from inheritance tax and the government is currently considering an improvement to the relief. The Charity Service is a registered charity so that a gift to The Charity Service in your Will will secure inheritance tax relief for the benefit of your estate. In making a gift to The Charity Service, you can leave a letter of wishes with your Will asking us to make payments after your death to other charities out of your gift to The Charity Service.

Your letter of wishes can be changed informally at any time and without incurring the expense of changing your Will. Your letter of wishes can also nominate others who, after your death, can ask for payments to be made out of your gift to such charities that they think you would have wished to benefit or to such charities which they wish to benefit in your memory.

The Charity Service already has established links with banks, investment specialists, accountants, lawyers and other professionals that could be called upon as required.

If you are interested or if you have any queries relating to your Will or estate planning where a flexible charity could be useful to you, please contact - Anthony Greaves on 0303 999 1212 and choose option 1.

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Online Fundraising

MyGift

Create and manage your own fundraising page to raise money for your sponsored event or donate direct to the charity of your choosing. It only takes a few minutes to create your page and then just share the link out to your friends and family whether by email or social media such as Facebook or Twitter.

There are no monthly subscription fees for the charity and, as we are a UK registered charity ourselves, the small administration fee deducted from the total monies raised means that every penny remains within the charity sector.

If you are a charity looking to set up a general appeal why not create your own charity page with details of forthcoming fundraising events. You can also advertise for FREE using a banner on our website.

Should you have any difficulties please contact Ashlie Tottle on 0303 999 1212 Option3, mobile 07730 217 954 or you can email your query to ashlie.tottle@charityservice.org.uk

Donate now

This is a FREE service to charities to equip them with a “Donate Now” button on their own website. It only takes a few minutes to set up and your charitable cause can reap the benefits of a fundraising mechanism that is available 24/7 and that does not need to be administered by you.

We can send you a hyperlink to enable you to add a “Donate Now” button on your homepage so that any visitors to your website can donate money quickly and easily.

We will process all donations securely and will remit funds to you within 10 working days of the month in which they were donated.

For more information please contact Ashlie Tottle on 0303 999 1212 Option3 or mobile 07730 217 954

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Ashlie Tottle Online Donations Manager

Ashlie brings twenty years' experience of office administration and support to senior executives of The Charity Service having been formerly employed by Anglian Water Group Developments Limited and Grant Thornton.

She holds a degree in Economics from De Montfort University and has been involved in the augmentation of two family run small businesses.

Passionate about giving back to charities and helping good causes, she can be contacted to assist the smallest of groups through to national charities in the setting up of fundraising pages or adding a Donate Now button to their web page.

In her spare time she looks after her extended family, spending many hours in a karate dojo (as a spectator) and at the side of a football pitch. More recently she has begun to understand the frustrations of golf, having started lessons.



Community support and charity accounting

Your charity is responsible to so many people - donors, beneficiaries, employees and funding bodies to name but a few. At the same time your charity also needs to comply with new regulations and reporting requirements to satisfy HMRC and the Charity Commission. It can be a difficult and time consuming task and smaller charities can struggle in recruiting a treasurer or financing a computerised accounting system.

The Charity Service believes your charitable objectives should be the main focus of your time and this is why we have designed a range of services to help.

We can:

- * Process receipts and increase your donations by claiming Gift Aid (where appropriate).
- * Maintain a purchase ledger, recording and analysing all costs, even paying bills using a BACS payment facility
- * Maintain a grants ledger, analysing grants by type (in the way that is most helpful to you) and ensuring those grants are paid to the recipients in a timely manner.
- * Process your monthly payroll and complete end-of-year returns, as required.
- * Produce regular reports comparing your budgets and forecasts with actual figures.
- * Provide help with year end accounts and documentation necessary for the Charity Commission, HMRC and your trustees.

The Charity Service has invested in highly competent and experienced staff and financial management software with the capacity to deal with the financial records of any charity. We are happy to share our long established contacts within the financial and professional sector to provide your charity with the best possible service.

Please call us on 0303 999 1212 and choose option 1, to discuss your requirements, we will be happy to hear from you.

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Supporting community organisations

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Ruth Gee Finance Officer

Ruth joined us with 25 years of varied accounting experience, mainly in the creative sector, including a world tour with Holiday on Ice.

She has lived in Manchester for the past 12 years and now teaches International Business and Management Studies to Pre-Masters students for INTO University Partnerships. In addition Ruth runs her own business as an accountant for small creative enterprises.

In her spare time Ruth plays su-doku, auntie to her friends' children and attempts DIY with varying success.



Corporate social responsibility



The Charity Service can assist businesses to develop their Corporate Social Responsibility agenda, as part of our Expert Advice Service. Through our charitable status and links into the Third Sector, we can help companies to manage their philanthropic business processes intelligently. We can also help businesses to take advantage of government incentives and our well established management systems to produce an overall positive impact for their stakeholders through a philanthropic model.

We can assist with :

- * Staff inductions to introduce Payroll Giving schemes
- * Raising awareness of Corporate Social Responsibility through our Voucher Schemes
- * Creating opportunities for the business's internal and external CSR profile
- * Managing intelligent corporate charitable donation activity
- * Charitable Trust set up, management and distribution of funds
- * Defining the Key Performance Indicators important to your business
- * Promoting employee volunteering.

We offer a bespoke, personalised service to companies to help drive their performance forward around philanthropic Corporate Social Responsibility, planning and delivery.

For an informal discussion to see how The Charity Service could help your business contact, Catherine our Chief Executive on 0303 999 1212 and choose option 4.

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Corporate Social Responsibility

Board of trustees and Patrons

THE Charity Service
Registered Charity No: 1011293
making more of every gift



Chairman **Richard Dyson** MA FCA

Throughout his professional career, Richard has been involved in corporate finance matters. Providing advice, at board level, to both clients and third party investors, he is familiar with the accounting, governance, reporting and wider business issues in a wide variety of sectors and ensuring businesses are managed in a cost effective manner. Richard is a past president of the ICAEW and, since retiring from Ernst & Young, he has become increasingly involved in the third sector as a director/trustee of The David Lewis Centre and Concord College and Chairman at Wythenshawe Hospital Transplant Fund.



Trustee **Gavin Bushell** LLB

Gavin Bushell has been a director of The Charity Service for many years. He is currently a Consultant in the Private Capital Team at Cobbetts having been a partner since 1977. Throughout his career, Gavin has been involved with private client work including work relating to the legal aspects of charities.

He is a member of the Society of Trust and Estate Practitioners and a public notary. In his spare time, Gavin is a keen and active scuba diver and a crossword addict but is still trying to find a way of doing both at the same time.



Trustee **John Eckersley** BA (Hons) MBA chartered FCSI

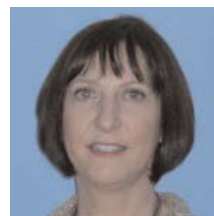
A graduate of Accounting and Finance. John is a former director of Henry Cooke Group plc and of Brown Shipley & Co Ltd, with over 20 years' investment experience. He founded Castlefield Investment Partners LLP with close colleagues in 2002, specialising in investment for charities. In his spare time, he is Treasurer of the Royal Botanical & Horticultural Society of Manchester and the Northern Counties, a trustee of the Rhodes Foundation and a non-executive director of W T Burden Ltd. His interests include music, contemporary art and latest electronic gadgets!



Trustee **Paul Chorlton** FCCA

Paul joined Staniforth in 1999, helping to restructure team finances and targets. Following its acquisition by the Omnicom Group, he then became FD of Staniforth, Tequila and Digerati, continuing there until 2008 when he set up his own PR business. He is now a director at LIFE PR and LOVE Creative, a branding and design company in Manchester.

He is also a trustee of the Annual Manchester Ball, raising money for the Together Trust and the Chairman of the 3rd Gee Cross Scout Group which is currently in the process of building a new £250,000 home to be used jointly as a community centre.



Trustee **Lesley Doran** CPA

With a strong financial background Lesley has worked in various industry sectors and has extensive business experience. She is currently the HR Director with WTB Group Limited, where she is responsible for leading the overall people strategy from both an operational and strategic perspective. She is an accredited Life Coach and NLP Master Practitioner and enjoys Yoga in her spare time.

Patron **Cllr Mohammed Afzal Khan** CBE LLB

Afzal came to the UK at the age of 11, studying and working in Nelson. Moving to Manchester he completed his education and joined GMP as a constable eventually going into law. Currently a partner at Khan Solicitors. He was elected councillor for Cheetham Ward in 2000, since when has served on a number of committees.

His extensive charitable and community work throughout the area is widely recognised and in 2008 he received the CBE.

Currently along with his extensive charitable work, he is a national trustee of the British Red Cross and a board member of The University of Manchester.



Patron **Arthur Burden** OBE FCA

In 1959 Arthur became a partner at Beever & Struthers, and also took an increasingly active interest in the public, voluntary and charity sectors. In 1983 he became chairman of the family's Charitable Foundation, set up by his father and partly funded through his shares in the Burden company.

Today Burdens is the UK leading supplier of products and services to civil and utility companies etc. The Foundation continues to support causes both at home and abroad, including a school at Burkina Faso which the Foundation built in Ouagadougou and which currently has just over 300 children including a growing percentage of blind and visually impaired children.



Board of Trustees & Patrons

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