

Giveall Payroll Giving

A Guide for Employers and Employees



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GIVEALL PAYROLL GIVING

Payroll Giving is an HMRC-approved scheme whereby employees are able to donate to charity from their pre-tax income. Payroll Giving has been available since 1987. Giveall has transformed it.

Employees authorise their employer to make deductions from their salary or pensions. The employer then forwards these donations to a Payroll Giving Agency (PGA) who disburses them to the intended charities. Giveall is an HMRC-approved Payroll Giving Agency (PGA).

Donations are deducted from an employees' salary before tax so, effectively, what the donor would have paid in tax goes to charity instead.

Employee pledges & charity receives	Cost to employee: 20% taxpayer	Cost to employee: 40% taxpayer	Cost to employee: 50% taxpayer
£5.00 per month	£4.00	£3.00	£2.50
£8.00 per month	£6.40	£4.80	£4.00
£10.00 per month	£8.00	£6.00	£5.00
£15.00 per month	£12.00	£9.00	£7.50

Giveall is the breakthrough online payroll giving platform owned and operated by the UK-registered charity, Giveall2Charity.

Giveall is the only fully automated and admin-lite payroll giving scheme. Quick and easy to set up, it runs automatically; all parties have 24/7 access to their accounts and employees can vary or stop their giving at any time. It's confidential and secure. Donations can be made anonymously but if an employee prefers, we can forward their details to their charity (according to the Data Protection Act). Employees can have multiple employers and continue giving seamlessly when they change jobs if the new employer is on Giveall.

It costs employers nothing. It's easy to set up and hassle-free to administer. Giveall Payroll Giving is great for team building and employer/staff engagement with great CSR and PR opportunities for employers. Switching from one Payroll Giving Agency to another is simple (exclusive relationships are not allowed).

Charities have the opportunity to receive regular, commission-free income. Employers must forward the donations to Giveall within 14 days of the end of the following Income Tax month and Giveall processes the payment within two working days.

We are so confident about Giveall Payroll Giving that if any employer is not entirely satisfied with the service, they may cancel their contract by giving twenty-four (24) hours' notice (as opposed to the 3 months required by most other Agents).

Through the Giveall Payroll Giving platform, employees can select and donate to the registered charity of their choice and/or choose to deposit their deduction into a Personal Donor Account, for donating at a later time. There is no limit to the number of charities that can be supported by any one employee.

HOW DOES THE SCHEME WORK?

Employers must register and setup their Giveall Payroll Giving profile first on our website. To make everything legal, the completed contract (included in this pack) must be posted back to us.

You can even opt to match the donations made by your employees.

Each employee must register and link to their employer's Giveall Payroll Giving profile. They set up which charities they're donating to and/or how much to deposit into their Personal Donor Account, for later use.

The choice of recipient charity remains confidential to the employee and Giveall2Charity, who process the allocation of the funds to the designated charities. Giveall2Charity will not divulge any details of recipient charities to the employer.

If you're currently with another Payroll Giving Agency – don't worry! All Payroll Giving Contracts are **non-exclusive**, so employers can operate with more than one agency while the employer and employees assess the considerable savings achieved through Giveall2Charity. Setting up a Giveall Payroll Giving account is very straightforward. Giveall2Charity don't charge employers and there are no commission or transaction fees on donations made with Giveall Payroll Giving.

If you have any questions, please feel free to contact us at CustomerServices@giveall.org

ACCOUNT OPTIONS

We have created various options for your employees. These are as follows:

- **Direct donation to charities (Standard free process)**
The employee sets up a deduction straight to the charity or charities of their choice.
- **Personal Donor Account (Standard free process)**
The employee sets up a deduction to go to their own Personal Donor Account. At any time, the employee can make an online transfer of funds directly to any charity of their choice.

With Giveall, employers have even more options to fundraise for their business charities now.

We have three additional **OPTIONAL** accounts available, and they are:

- **The Staff Charity Account**
This account allows employees to support the business charities with their Payroll Giving deductions only. The employees can select this account when setting up their Payroll Giving deductions.

£5 + VAT monthly fee. Paid by Standing Order on 15th monthly

▪ **Employer Charity Account**

This account can accept Payroll Giving deductions, direct donations and allow fundraising for the business charities. Employees, customers and the company itself can make contributions into this account.

£20 + VAT monthly fee. Paid by Standing Order on 15th monthly

▪ **Company Charity Account**

This account is for the sole purpose of holding business funds only that will be paid across to charitable organisations. No deposits from employees or customers are permitted on this type of account.

£20 + VAT monthly fee. Paid by Standing Order on 15th monthly

To discuss what the best option for your organisation is, please don't hesitate in emailing us at CustomerServices@giveall.org

TO START YOUR PAYROLL GIVING

Setting up your Payroll Giving scheme is simple!

Have you ...

- ☐ Registered your employer profile account on our website: www.giveall.org?
- ☐ Completed and signed a Giveall Payroll Giving Contract?
- ☐ Returned, by post, the Giveall Payroll Giving Contract? Send to:
Giveall2Charity, 01 Meadlake Place, Egham, Surrey, TW20 8HE
- ☐ Received a countersigned Giveall Payroll Giving Contract by email from us?

If you have any questions, contact CustomerServices@giveall.org

Alternatively, please contact us:

By post: **Giveall2Charity
1 Meadlake Place,
Egham
Surrey,
TW20 8HE**

RUNNING YOUR PAYROLL GIVING SCHEME

Before Payroll Giving deductions can be made:

- **Calendar Dates:**

- ☐ You will need to enter Cut-Off and Confirmation dates for each payroll period. This will allow your payroll giving to start as soon as we've activated your account once we've received your completed contract. You can set up dates up to 12 months in advance

Calendar Dates explained

Cut-Off Date:	Employees must make any changes to their deductions before this date. Employer must activate a new employee before this date.
Confirmation Date:	Always set as the last day of the calendar month. You can complete the process on or before this date.

- **Employee Registration:**

- ☐ Register and create an account.
- ☐ Setup their payroll deduction via linking to your payroll giving profile.

- **Verification of Employees:**

- ☐ The scheme administrator will receive an email once an employee has linked their payroll deduction to your payroll giving profile via your Accounts Office Reference Number.
- ☐ Login and approve the employees before the next Cut-Off date so they are included in the upcoming Payroll Giving run.

- **Payroll Run Verification:**

- ☐ The scheme administrator will need to verify the employees for that payroll run before they can process the payroll run.
- ☐ Files will be generated immediately, and you can choose to open or save the file. The name of your file is the reference quoted on the email we send the Administrator once the file has been processed.

Making Payroll Giving deductions:

The file that you download after processing the latest payroll run will show you how much is needed to be deducted for each employee.

Sending Payroll Giving deductions:

- ☐ Send the total amount of money in a **single BACS transaction** (not a separate transaction for each employee) to:

BANK: Barclays Bank PLC
SORT CODE: 20-84-61
ACCOUNT NO: 23948129
ACCOUNT NAME: GIVEALL2CHARITY PAR

IN EVERY BACS PAYMENT, IN THE BACS REFERENCE FIELD, PLEASE QUOTE YOUR EMPLOYER ACCOUNT NAME PRECEDED BY YOUR UNIQUE 3 DIGIT GIVEALL REFERENCE. YOUR UNIQUE GIVEALL REFERENCE IS ALWAYS DISPLAYED IN THE 'EM' FILE REFERENCE SENT OUT TO YOU AFTER EACH FILE HAS BEEN PROCESSED. IT IS ALWAYS THE LAST 3 DIGITS IN THIS REFERENCE.

E.G. 'Company Solution Ltd', if the file reference in your email is EM240100000129 then your unique Giveall ID is '129'. Please quote **129 Company Solution Ltd**, on every BACS payment you send us.

EMPLOYERS: HOW TO REGISTER FOR GIVEALL PAYROLL GIVING

All users of the Giveall Platform need to create a “User Account” first. We suggest that you use your work email address for payroll giving as an employer to keep it separate from the “User Account” that you might use for your own personal fundraising and donations. If you have one already, go to step 2 and Login.

Step 1

Click the “Register” button at the top right of each page. Complete the user registration wizard in 5 quick steps. This will create your “User Account” but note, you will not be logged in yet.

Step 2

Once you have clicked the activation link in your Email Verification email, login and click the “Start Payroll Giving” button in the line of buttons below the Giveall logo. Select the “I’m an Employer” button.

Step 3

Complete the step by step wizard with all of your organisation’s details in 4 quick steps.

Step 4

Once you have clicked on the “Finish” button of the wizard, you will be taken to the “Payroll Calendars” tab where you will need to enter your Cut-Off and Confirmation dates for each payroll period. This will allow your payroll giving to start as soon as we’ve activated your account once we’ve received your completed contract.

Step 5

To make everything official as your Payroll Giving Agency, please print out and complete the contract below.

Please post the signed contract to our Payroll Giving team at Giveall2Charity, 01 Meadlake Place, Egham, Surrey, TW20 8HE

Please remember to give your employees your Accounts Office Reference Number as this is how they will search and link to your Giveall Payroll Giving profile.

Calendar Dates explained

Cut-Off Date:	Employees must make any changes to their deductions before this date. Employer must activate a new employee before this date.
Confirmation Date:	The last day of the month and the date by which you will need to confirm the payroll.

Employees: How to register for Giveall Payroll Giving

All users of the Giveall Platform need to create a “User Account” first. We suggest that you use your work email address for payroll giving as an employee to keep it separate from the “User Account” that you might use for your own personal fundraising and donations. If you have one already, go to step 2 and Login.

Step 1

Click the “Register” button at the top right of each page. Complete the user registration wizard in 5 quick steps. This will create your “User Account” but note, you will not be logged in yet.

Step 2

Once you have clicked the activation link in your Email Verification email, login and click the “Start Payroll Giving” button in the line of buttons below the Giveall logo. Select the “I’m an Employee” button.

Step 3

Complete the step-by-step wizard with all your details in 4 quick steps.

You will be asked for your employer’s Account Office Reference.

Please use: *(insert the Account Office Reference here)*

Step 4

Once you have clicked on the “Finish” button of the wizard, your employer will be informed and will need to approve your details before your payroll deduction is processed in their next payroll run.

How to make changes to your payroll deduction

You can make as many changes as you want to your payroll deductions by logging in and going to the “**Employee**” heading in the left hand orange menu.

1. Your Employer name appears and to the far right of the screen you will see a column headed ‘**Payroll**’
2. Click on the edit pencil in the ‘**Payroll**’ column and then click on the ‘**Deductions**’ tab.
3. You are now on the screen where you can add/ delete or make changes to your existing contributions.
4. **Save/ Update** your changes before logging out.

Keep this in a safe place for further reference.

PAYROLL GIVING CONTRACT

This Contract is between Giveall2Charity, a company Limited by Guarantee in England No: 7075425, (the 'Approved Agency') and

Employer's Name: (the 'Agent')

Type of entity: Tick as appropriate: ☐ Company ☐ Partnership ☐ Other

Registration Number:

Employer's Address:

Post Code:

Telephone: Email:

1. From today / / 202 , the **Agent** will operate the Giveall Payroll Scheme under the Taxes Act 1988 Section 202 and the Charitable Deductions (Approved Schemes) Regulations 2211 of 1986 (as amended) as an **Agent** to the **Approved Agency**.
2. The **Approved Agency** and the **Agent** agree:
 - a. The Scheme will be operated in accordance with the Scheme Definition which is appended to this contract and which forms an integral part of this contract.
 - b. That there will be **NO** administration charge paid by the **Agent** to the **Approved Agency**.
 - c. This contract will run initially for a period of one calendar year and will continue thereafter unless terminated:
 - i. By the Approved Agency giving at least three (3) months' notice of termination.
 - ii. By the Approved Agency giving notice of immediate termination if the Agent at any time fails to give effect to the Scheme.
 - iii. By the Scheme ceasing to be an approved scheme.
 - iv. By the Agent, notwithstanding the above, on giving twenty-four (24) hours' notice of termination, or
 - v. The Approved Agency ceasing to be a registered agency.
 - d. The **Agent** will make remittances by BACS and confirm electronically, the periodic listings of employees' Payroll Giving deductions as defined by the Approved Agent.

If you are unable to use BACS, please contact us to arrange another payment method.

- e. That the **Agent** will appoint a Scheme Administrator to liaise with the **Approved Agency**:

Contact Name: Position:

Telephone: Email Address:

The **Agent's** payroll details are as follows:

Frequency: Quarterly Monthly ☐ 4-Weekly ☐ Weekly ☐ (please tick **one** option ☐

Accounts Office Ref No.: Office No: P Unique No:

Number of employees (including Directors) on the payroll?

3. The **Agent** will “match” employees’ Payroll Giving deductions, in whole or in part, on the following basis:

Please state the basis for your “matching” contributions, e g, 100% or 50% of each donation up to a maximum of £ XXX.XX amount, or enter “Not Applicable”:

☐ 100% ☐ 50% Other %

Limit on matching, if any: ☐ No limit Limit

4. The **Agent’s** payroll is processed by the (please tick **one** of the following options):

a. ☐ The **Agent**.

b. ☐ Another organization, e g, payroll bureau (please specify below):

Company/Bureau Name:

Company/Bureau Address:

Post Code:

Contact Name: Position:

Telephone: Email Address:

Do you accept the terms and conditions? ☐ Yes ☐ No

Do you wish your name to remain anonymous? ☐ Yes ☐ No

Signed on behalf of Giveall2Charity

Signed:
Position:
Print Name:
Date:

Signed by, or on behalf of, the Agent

Signed:
Position:
Print Name:
Date:

Keeping you informed. Our Data Protection statement.

We would like to tell you by letter, phone or email about additional products and benefits from the Giveall2Charity group that we believe will be of interest to you. If you would prefer not to be contacted, please tick the appropriate boxes. Please note that ticking a box means that we will not be able to tell you about these additional benefits.

Giveall2Charity and the companies in which it has a majority stake (the group) will not share your information with any outside organisation except as part of providing a product/service or when legally obliged to do so.

I do not wish to receive details of: ☐ Other products and services from the Giveall2Charity group.
☐ Forthcoming events from the Giveall2Charity group.

Alternatively, write to: The Data Protection Officer, Giveall2Charity, 01 Meadlake Place, Egham, Surrey, TW20 8HE, giving your details and instructions.