



# Gift Aid Training

*giftaid it*

# What is Gift Aid?

- A government scheme
- Encourages giving to charities
- Allows the charity to claim back 25p in every £1 donation from the tax man



# The Gift Aid Steps

**Step 1:** Find someone to help you if you don't have the time to do it yourself

**Step 2:** Register your unit with HMRC

**Step 3:** Set up a Gift Aid record

**Step 4:** Check your unit's accounts to ensure the correct records are being kept

**Step 5:** Get the Gift Aid declarations signed (ongoing)

**Step 6:** Make your claim to HMRC and receive your payment

**Additional:** Making changes to your account

# Step 1: Finding help

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# Step 2: Register with HMRC

**Form:** Gift Aid Certificate for England and Wales

Members Area → Running Your Unit → Finance & Insurance → Gift Aid



**CERTIFICATE** for HMRC Charity Registration (E&W)  
(England and Wales)

Name of unit or area

Correspondence address

Phone number

I CERTIFY that:

The branch of The Guide Association named above is constituted in accordance with the Royal Charter and Byelaws of The Guide Association and governed by *The Guiding Manual* and the Association's handbooks, with the principal charitable objective of promoting education of girls and young women to help them develop emotionally, mentally, physically and spiritually so that they can make a positive contribution to their community and the wider world.

Details of Responsible Persons

Applicant  
full name

Address

  
  
  

National Insurance number

Date of birth

Responsible person 1  
full name

Address

  
  
  

Address [3]

National Insurance number

Date of birth

Responsible person 2  
full name

Address

  
  
  

National Insurance number

Date of birth

Person signing the  
Gift Aid claims

Two other people  
responsible for the unit

Details of Responsible Persons

Applicant  
full name

Address

  
  
  

National Insurance number

Date of birth

Responsible person 1  
full name

Address

  
  
  

Address [3]

National Insurance number

Date of birth

Responsible person 2  
full name

Address

  
  
  

National Insurance number

Date of birth

Authorised signatory for Girlguiding

This section  
completed by  
Girlguiding

Name

Date

Signature

See explanatory notes on next page



- Email completed form to [giftaid@girlguiding.org.uk](mailto:giftaid@girlguiding.org.uk)
- Girlguiding will return signed form and HMRC application form

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When you receive these forms you will need to:

- Complete the bank account details
- Get each person to sign to confirm their details
- Get the applicant to sign on the final page

- Email completed form to [giftaid@girlguiding.org.uk](mailto:giftaid@girlguiding.org.uk)
- Girlguiding will return signed form and HMRC application form

When you receive these forms you will need to:

- Complete the bank account details
- Get each person to sign to confirm their details
- Get the applicant to sign on the final page

You will then need to post the following to HMRC

- The completed and signed Gift Aid application
- The unit's HMRC Charity Registration certificate
- A copy of the unit's most recent bank statement
- A copy of your latest year end unit accounts

You will receive a letter from HMRC confirming that you can claim Gift Aid.

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**You can now  
celebrate!!**



# Step 3: Set Up Records

## Step 4: Check Unit Accounts

Unit accounts should include:

- Name of the person making the payment
- Date the payment is received
- Amount received
- What it was for

Date	Details	Reference	Total	Code	Subs under Gift Aid	Subs - non Gift Aid	G Re
			£3,328.26		£1,021.50	£246.00	
01-January-08	Sample Entry Line	123	5.25	2		5.25	
30-March-12	Clare Eckley Subs Mar cash	7	14.00	2		14.00	
30-March-12	Jemimah Fowler Subs Mar cheque	11	12.00	1	12.00		
30-March-12	Courtney Shields subs & donation ca	14	17.00	1	17.00		
19-April-12	Maisie Kibble subs & census Spring	16	32.00	2		32.00	
03-May-12	Clare Eckley Subs Apr/May cash	28	14.00	2		14.00	
03-May-12	Paige Fletcher Subs Apr/may cheque	26	14.00	1	14.00		
03-May-12	Ter-mai Didcote Subs Apr/May cash	25	26.00	1	26.00		
14-June-12	Shannon Wintle Subs Summer Ch	31	22.00	1	22.00		
14-June-12	Jemimah Fowler Subs summer Ca	32	22.00	1	22.00		
14-June-12	Kalli Law Subs Summer Ca	33	22.00	1	22.00		

# What can you claim?

- Subs
- Census Income
- Donations
- Joining Fees
- Expenses donated back to the unit

Not money paid for:

- Trips/outings
- Residentials, etc
- Books, Uniform, etc

# Step 5: Declarations Signed

Ongoing process

**Form:** Starting ... leaflets

**Form:** Gift Aid Declaration

Download forms from Girlguiding website



# Step 6: Make Your Claim

Three options for claiming now

## **Options 1:** Claim using Online Form

Can be used to make a claim for up to 1000 gift aid donors

Perfect for Guiding claims

## **Option 2:** Claim through your own database

Aimed at larger organisations where they make bulk claims on a regular basis. Not relevant for Guiding

## **Option 3:** Claim using a paper form

Aimed at those with no access to the internet

# Preparing the Claim Info

Anne's  
Intermediate  
Spreadsheet

	A	C	D	E	F	G	H	I	J	K	L	M
1	1st COALEY GUIDE UNIT REGISTER											
2	1 January 2013 to 31 December 2013											
3												
4	Name	Donor's Name	House Name/ No	Postcode	Subs paid in term 1	Subs paid in term 2	Subs paid in term 3	Subs paid in year	Dec?	Claim Gift Aid	Date Last paid	
5	Ansell, Tilly	Mrs Diane Ansell	47	GL11 4GB	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	09-Sep-13	
6	Beck, Sophia				£25.00	£25.00	£25.00	£75.00	No	£0.00	04-Oct-13	
7	Beck, Vicki				£25.00	-	-	£25.00	No	£0.00	07-Jan-13	
8	Brown, Emily	Mr Ian Brown	62	GL11 4EG	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	25-Sep-13	
9	Brown, Jessica				£25.00	£25.00	£25.00	£75.00	No	£0.00	09-Sep-13	
10	Browne, Lottie				£25.00	£25.00	£25.00	£75.00	No	£0.00	30-Sep-13	
11	Burton, Esme	Ms Holly Wyatt	31	GL11 4ET	£25.00	-	-	£25.00	Yes	£25.00	04-Feb-13	
12	Corbett, Emily				£25.00	£25.00	£25.00	£75.00	No	£0.00	22-Sep-13	
13	Corbett, Olivia					£12.50	£25.00	£37.50	No	£0.00	22-Sep-13	
14	Davies, Ria	Mrs Julie Davies	1	GL11 6HY	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	13-Sep-13	
15	Darmer, Rebecca	Mr J. Darmer	4	GL11 5LR	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	09-Sep-13	
16	Gazzard, Imogen	Ms Lisa Gazzard	'Baytree Farm	GL10 3TY	-	-	£25.00	£25.00	Yes	£25.00	23-Sep-13	
17	Hallam, Emily	Ms Sue Hallam	6	GL11 5EF	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	10-Sep-13	
18	Hallam, Georgia	Ms Sue Hallam	6	GL11 5EF	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	10-Sep-13	
19	Innes, Charlotte	Mrs Helen Innes	2e	GL11 5SS	£37.50	-	-	£37.50	Yes	£37.50	01-Mar-13	
20	Kennedy, Clare	Ms Marianne Kennedy	4	GL11 5EN	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	04-Oct-13	
21	Kerry-Campbell, Freya	Ms Fiona Campbell	2	GL11 5SS	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	04-Oct-13	
22	Knight, Elise	Ms Marie Knight	28	GL2 7HP	-	-	£25.00	£25.00	Yes	£25.00	09-Sep-13	
23	Laewenthal, Catherine	Mrs Deborah Laewenthal	18	GL11 5UT	£25.00	£25.00	£10.00	£60.00	Yes	£60.00	15-Sep-13	
24	Milliner, Naomi	Mrs Lucy Milliner	19	GL11 4EB	£25.00	£25.00	-	£50.00	Yes	£50.00	11-Jun-13	

Download spreadsheet from 1<sup>st</sup> Coaley Brownies website

25	Morgan, Megan	Ms Anita Morgan	5	GL10 3TT	-	-	£25.00	£25.00	Yes	£25.00	22-Sep-13	
26	Nicholson, Harriet	Mr Mark ind	34	GL11 4AS	£25.00	£25.00	-	£50.00	Yes	£50.00	15-Apr-13	
27	O'Brien, Cerys	Mrs Anne O'Brien	Boundary House	GL11 5LP	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	10-Sep-13	
28	Owen, Abigail	Mrs Nikki Owen	3	GL11 5RT	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	13-Sep-13	
29	Perkins, Abbie				£25.00	£25.00	£25.00	£75.00	No	£0.00	30-Sep-13	
30	Pickard, Elin	Mrs Joanne Pickard	30	GL11 5RZ	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	15-Oct-13	
31	Price, Megan	Mrs Amanda Price	7	GL11 5RH	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	10-Sep-13	
32	Smith, Emily				-	-	£25.00	£25.00	No	£0.00	04-Oct-13	
33	Sprason, Charlotte	Mrs Tracey Sprason	10	GL11 5EP	£25.00	£25.00	£25.00	£75.00	Yes	£75.00	20-Sep-13	
34	Swift, Naomi	Mrs Vicky Swift	4	GL11 4PZ	£25.00	-	-	£25.00	Yes	£25.00	08-Feb-13	
35	Thomas, Freya				£25.00	-	-	£25.00	No	£0.00	04-Feb-13	
36	Troup, Poppy	Mr Simon Troup	9	GL11 4NG	£25.00	£25.00	£15.00	£65.00	Yes	£65.00	16-Sep-13	
37	Tur[, Libby	Ms Janice Tur[	14	GL11 4EW	£25.00	-	-	£25.00	Yes	£25.00	08-Feb-13	
38	Walton, Florrie	Rose Walton	28	GL11 5JW	-	-	£25.00	£25.00	Yes	£25.00	13-Sep-13	
39	Webb, Lily	Mr Anthony Webb	3	GL11 5PT	£50.00	£25.00	£25.00	£100.00	Yes	£100.00	30-Sep-13	
40	Williams, Niamh				£25.00	£25.00	-	£50.00	No	£0.00	08-Apr-13	
41	<b>Total Subscriptions received</b>				£787.50	£612.50	£650.00	£2,050.00		£1,512.50		

# Option 3: Paper Forms

**Form:** ChR1 - Claim form

**Form:** ChR1CS - Continuation sheet

Ordered from HMRC Charities helpline

Designed to be scanned in by HMRC into the new system and speed up payment

No limit to number of claims on one form

**HMRC Charities helpline**

Open 8am - 5pm

Monday to Friday

0845 302 0203

# Option 1: Claiming online

- Register with HMRC online service

[www.online.hmrc.gov.uk](http://www.online.hmrc.gov.uk)

- Activate your account
- Make your claim online

# Additional: Record Keeping

## How long to keep records:

Declarations - 6 years after the last year the claim is made for

Eg the claim for 2015 account must be kept for 2016, 2017, 2018, 2019, 2020, 2021 and can be destroyed in 2022!

## How to keep records:

- Print outs of record of subs, confirmation page of HMRC website, etc stapled as one thing and filed in year order.
- Declarations filed in alphabetical order by child's surname

**At the end of each year**, go through the declarations and write the year on the top of each form that you have claimed for.

Then look through your declarations, work out which year you can now destroy and remove and that only have years before then.

# Additional: Making Changes with HMRC

Form: ChV1 - Amendment Form

Available from HMRC website

Must be done at least 30 days prior to making a claim