

Bank  
Workers  
Charity

# Fundraising Toolkit



**Inspiring tips and resources to help you get started  
on your fundraising journey**

# You're making a difference - thank you!

By fundraising for Bank Workers Charity, you're helping past and present bank workers - and their families - through life's toughest moments.

Since 1883 we've been here to provide support with challenges such as money worries, health problems, relationship breakdowns and caring responsibilities - wherever it's needed most. Demand for our services has risen sharply in recent years, so the generosity of people like you is vital to ensure that together we can keep making a difference.

To support you on your fundraising journey, we've put together this toolkit full of ideas, tips and resources to help you get started and make the most of your efforts.

The people you're helping:

**"Before speaking to Bank Workers Charity, it felt like everything had fallen apart. I cannot speak more highly about the life-changing support they've given me. I'm grateful beyond belief."**

- David, current bank worker





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# 01 Fundraising ideas

Looking for inspiration? Here are some simple, fun ways to raise money – whether on your own, with colleagues, or as part of a team.

## At work



**The Great British Banking Bake Off:** Host a bake sale with colleagues – with extra kudos for bank-themed bakes



**The Great Bankers' Walk:** Walking boosts energy and reduces stress – so why not turn it into a step challenge? Set a team target or add some friendly competition to see who clocks up the most



**Hawaiian shirt day:** Brighten up the office by wearing your most colorful clothes. Get senior leaders involved to show their support too



**Run a snack shop:** Help colleagues beat the afternoon slump – and support a great cause in the process



**Dress down day:** Swap the suits for something casual and collect donations for the privilege



**Christmas jumper day:** Spread festive cheer and raise money at the same time



**Office quiz or bingo:** Test your colleagues' knowledge (or luck) and crown a winner while raising funds



### Top tip:

- Check if your employer offers match funding – it's a simple way to double the money you raise.



## Individual or group challenges:



**Sporting challenge:** Run a 5K, cycle to work for a month or even take on a marathon. Set up a JustGiving page and ask for sponsorship as you go



**Bucket list challenge:** Always wanted to skydive, abseil or bungee jump? Tick it off your list and raise funds by sharing your JustGiving page with family and friends



**Give it up challenge:** Could you go without caffeine, chocolate or social media for a week? Ask friends and colleagues to sponsor your willpower



**Birthday fundraiser:** Instead of gifts, invite friends, family and colleagues to donate to Bank Workers Charity for your birthday, work anniversary or work farewell



**Step challenge:** Compete with colleagues or friends to hit the most steps in a month – apps and fitness trackers make it easy to keep score

## Community events:



**Charity pub quiz:** Host a quiz night at your local or in the office. Charge an entry fee, add a raffle, and crown the champions



**Raffle or silent auction:** Great prizes could include a car park space for a month or canteen vouchers (check with your Office Manager)



**Car boot sale:** Declutter, raise money and enjoy the wellbeing boost of a good clear-out



**Coffee morning:** Invite friends, neighbours or colleagues to drop in for tea, coffee and cake, with donations going to the charity



**Sports day:** Organise five-a-side football, netball or rounders. A great way to bring people together while raising funds



## 02 Planning your fundraiser

A little preparation goes a long way. Here are five simple steps to help you plan your activity and make the biggest impact:

1. **Set a goal:** Decide how much you'd like to raise and think about what's driving you. A clear target, backed by a personal reason, will keep you motivated and inspire others to support you
2. **Choose your activity:** Pick something fun and manageable that you'll enjoy organising and others will want to get involved in
3. **Set a date:** Choose a time that works for you and your colleagues – and try to avoid clashing with other big events in your workplace calendar
4. **Gather support:** Recruit colleagues to help spread the word and boost donations. Getting senior leaders involved is a great way to show backing from the top
5. **Register your fundraiser:** Let us know your plans so we can support you (e.g. advise you on how best to collect donations)  
Email us at [fundraising@bwcharity.org.uk](mailto:fundraising@bwcharity.org.uk) – we're here to help

# 03 Promoting your event

Getting the word out is key to making your fundraiser a success. Here are some simple ways to spread the message:



**Email colleagues and friends:** Let them know what you're doing and how they can support you



**Share updates on social media:** Use Facebook, LinkedIn, Instagram or WhatsApp – and don't forget to tag us so we can cheer you on



**Post on your bank's intranet or staff bulletins:** Reach colleagues across different teams and locations



**Put up posters and flyers:** Use communal areas like canteens and break rooms – we've included a template to make it easy



## Top tips:

- Follow Bank Workers Charity on Facebook, Instagram and LinkedIn for updates and inspiration
- Tag us when you post about your event so we can share your story. Our handles: **@bwcharity** on Facebook and **@bankworkerscharityuk** on Instagram
- Share why you're fundraising, or a story about the people we've helped (like Maria, below) – it helps people connect with the cause



## The people you're helping:

### Maria's story

Leaving her abusive marriage was traumatic enough. But Maria was also in constant pain from a long-term health condition – and skipping meals so she could feed her five-year-old son.

Her ex-husband had moved out but refused to pay his share of the mortgage. Maria was told to move, but after setting aside enough for deposit and rent, she couldn't afford essentials like food, heating or a bed to ease her pain – let alone the rest of the moving costs.

How we helped:

- Provided financial help so she could move to a safe new house
- Helped furnish her new home with a supportive bed for her condition
- Gave Maria and her son the stability they needed to move forward

**“The care, attention and support I received from Bank Workers Charity was truly life-changing. They helped me turn things around and look ahead with positivity.”**

– Maria, current bank worker

# 04 Collecting and handling donations

There are lots of simple ways to collect the money you raise and send it to us:



## JustGiving

Set up your own fundraising page and share it with friends, family and colleagues. You can track your progress and see donations in real time. Set up your Just Giving page here:

[www.justgiving.com/charity/bankworkerscharity](http://www.justgiving.com/charity/bankworkerscharity)



## QR code/contactless

Once you create your fundraising page via JustGiving, you can access printable posters with a QR code in the “share” section. Alternatively, we can create an online donate page/ QR code for you - just email us at [fundraising@bwcharity.org.uk](mailto:fundraising@bwcharity.org.uk)



## Cash

Use sealed buckets or tins for collections and keep a simple log of all donations. Please don't send cash in the post



## Bank transfer

Our bank details are:

Account Name: The Bankers Benevolent

Fund Bank: Coutts Bank

Sort Code: 18-00-02

A/C No: 00879983

Please use **“Fundraiser”** and your **full name** as the payment reference



## Cheque

Make cheques payable to **The Bankers Benevolent Fund T/A Bank Workers Charity** and send to: Bank Workers Charity, 35 Great St. Helen's, London, EC3A 6AP



# 05 Templates

To make fundraising simple, we've created a set of templates you can use and adapt for your own event:



## Poster

Customise with your event details to spread the word in your office or community - [click here to download your poster template](#)



## Donations log

Keep track of cash and offline donations in one simple form - [click here to download your donations log form](#)



## Social media captions

Use these ideas in your posts to inspire friends and colleagues to donate:

1. I'm raising money for Bank Workers Charity, who step in when bank workers and their families face tough times – from money worries to mental health struggles. Please support my fundraiser here: [\[Insert link\]](#)
2. Bank workers aren't immune to challenges like financial hardship, poor health or caring responsibilities. That's why I'm fundraising for Bank Workers Charity, who provide support when it's needed most. Donate here: [\[Insert link\]](#)



## Fundraising email

Send a ready-made message to your contacts and invite their support:

**[Subject]:** Help make a difference for banking colleagues in need

**[Body]:** I'm organising a [cake sale/fun run/quiz night] to raise money for Bank Workers Charity – the only charity dedicated to supporting past and present bank workers and their families.

They're there when life takes an unexpected turn – whether it's money worries, health problems, relationship breakdowns or caring responsibilities.

I'd love your support – whether that's coming along, donating, or simply sharing my fundraiser with others.

- Event details: [\[Insert\]](#)
- Donate here: [\[Insert link\]](#)

Thank you so much. Together we can make a real difference.

# 06 Legal and safety guidelines

Here are a few things to keep in mind to ensure your fundraiser goes ahead safely and without a hitch.



## Raffles, sweepstakes and tombolas

These are all lotteries. People pay to enter, prizes are available, and winners are chosen at random.

For most lotteries you'll need to register with your local authority. However, workplace lotteries are treated slightly differently. They don't require registration, but:

- They can only be promoted by people who work on the same premises
- Tickets can only be sold to colleagues in that workplace
- All ticket money must go on prizes, reasonable expenses, or fundraising for the chosen charity
- Advertising must only take place on the work premises

For more detail, see the Gambling Commission guidance or contact us at [fundraising@bwcharity.org.uk](mailto:fundraising@bwcharity.org.uk)



## Health and safety

If you're running your own event, check whether a risk assessment is needed. For events run by third parties, make sure the organisers have the right risk assessments in place.



## Permission

Check if you need permission from the venue or your local council before going ahead.



## Insurance

If you're hosting a large public event, consider liability insurance to cover any risks.



# 07 Contact and support

**Have a question? Need materials? Want to register your fundraiser?**

**Call our Helpline** 0800 0234 834 (ask for the Fundraising Team)

We're open 9am–5pm Monday to Friday (except bank holidays)

**Visit our website** [bwcharity.org.uk](http://bwcharity.org.uk)

**Email us** [hello@bwcharity.org.uk](mailto:hello@bwcharity.org.uk)

## The people you're helping

"I'd been struggling with my mental health for years and felt like I'd hit rock bottom. With your support – therapy, counselling and someone who truly listened – I'm still here today. To the adviser who helped me: you'll never know how much it meant."

– Carmen, former bank worker

"I'm extremely grateful. Life is now so much easier. I've just had hip surgery, and thanks to your help we were able to replace our broken cooker. Before that, all we could manage were ready meals. Many, many thanks."

– Arthur, retired bank worker

## Supporting the banking community past and present

Bank Workers Charity is the working name of the Bankers Benevolent Fund, a company limited by guarantee in England (No. 19366) and a charity registered in England (No. 313080). Registered office: 35 Great St. Helens, London, EC3A 6AP.

