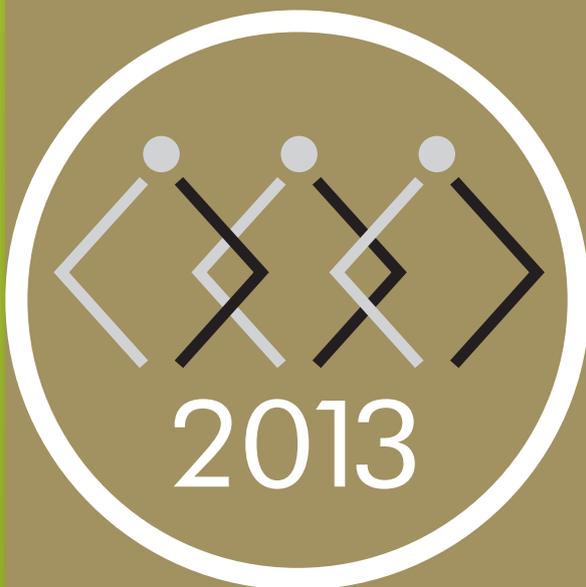


National **PAYROLL GIVING**

Excellence Awards



Showcasing the best
examples of UK employers'
commitment to Payroll Giving

**HM Treasury, 1 Horse Guards Road,
London SW1A 2HQ**

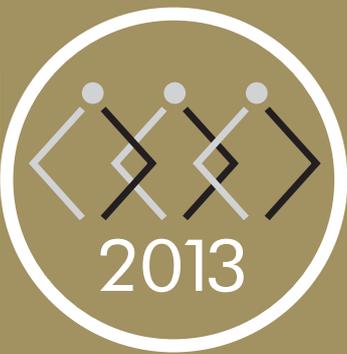
**Tuesday 3rd December 2013
6.30-9.00pm**

 HM Government

 30
Institute of
Fundraising

CharitiesTrust
connecting through giving™

CAF Charities Aid
Foundation



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Agenda

6.30pm	Arrival and Drinks
7.00pm	Awards Presentation (MC Peter Lewis CEO, Institute of Fundraising)
7.45-8.45pm	Drinks and Networking
9.00pm	Event Closes



Nick Hurd MP
Minister for Civil Society

I am delighted once again to see the real success stories of Payroll Giving.

The income that charities receive through Payroll Giving makes a big contribution to the charitable sector. Figures for 2012-13 suggest that there are now 750,000 donors giving through Payroll Giving, and that the amount that is given has increased by £6 million compared to last year.

This is of course good news but we know more can be achieved through Payroll Giving. That's why we sought out the views of charities, employers, donors, Payroll Giving Agencies, and Private Fundraising Organisations earlier in the year to help us understand how we can make Payroll Giving better so it delivers more for charities.

It was clear from the consultation responses that there is a commonly-held view that there is scope to improve the number of employers offering Payroll Giving and the number of employees engaged in the scheme. That's why we have set out a comprehensive package of measures to reflect this Government's determination to unlock the potential Payroll Giving has to become an even more important source of support to charities and the fantastic work they do. This Government will work closely with the sector to implement these changes and ensure that Payroll Giving continues to provide an effective work-place based means of tax efficient giving.

Part of our commitment is demonstrated in our continuing support of the National Payroll Giving Excellence Awards. It is always inspiring to see the fantastic examples of good work that charities and employers are doing to engage donors and get more employees giving and I commend every organisation, from the winners to those shortlisted, for their hard work over the past year.

I would like to thank all of the organisations, individuals, and judges who have contributed to the Awards and the Institute of Fundraising for its work in the promotion of Payroll Giving.

Congratulations to all the Award winners tonight. And I look forward to the next year when we will have an Award for the best Government Department or Agency!



Peter Lewis
Chief Executive
Institute of Fundraising

Your Master of Ceremonies

Welcome to the seventh annual National Payroll Giving Excellence Awards.

A former city solicitor, Peter became Chief Executive of IoF in October 2011.

Prior to joining the IoF Peter was the Chief Executive of London Voluntary Service Council.

Since leaving the law Peter has worked for national homeless charity Crisis, been CEO of the London Cycling Campaign and held a senior role at the Greater London Authority for six years.

Peter says' "A huge thank you to every organisation that has entered these awards, and also to the government for supporting them. I am proud to once again be celebrating the dedication and innovation of charities, agencies and employers collaborating together to maximise tax effective employee donations for important causes here and abroad".



Nicky Morgan MP
Economic Secretary
to the Treasury

Your Host

Nicky grew up in Surrey and studied law at Oxford University. She worked as a solicitor specialising in Corporate Law from 1994 – 2010. Nicky has been the Member of Parliament for Loughborough since 2010. From September 2012, Nicky served as an Assistant Government Whip and in October 2013, she was appointed as Economic Secretary to the Treasury. Nicky has a keen interest in mental health charities and in 2013, ran the London marathon raising over £2,300 for Rethink Mental Illness and Home-Start Charnwood.

Nicky says' "It is a great pleasure for me to welcome the National Payroll Giving Excellence Awards to the Treasury. I look forward to meeting with the participants and hear more first hand about how we help and assist the sector to ensure Payroll Giving continues its success".

Judging Panel



Jane Banks
Chair of the Judging panel

Jane is currently with the British Heart Foundation developing Payroll Giving. She helped them win the first ever Best Third Sector Employer Campaign at the National Payroll Giving Excellence Awards.

Previously Jane headed up the Corporate Services Team with CAF developing campaigns within the FTSE350, developing Payroll Giving services in Bulgaria, India, Russia and Australia, whilst successfully lobbying for tax advantages for people donating in Australia.



Andrew Edwards

Andrew has been Head of HMRC Charities since April 2010. He joined the Inland Revenue – now HM Revenue and Customs – in 1989 after a brief spell as a teacher.

In HMRC he has had a varied career as a tax inspector in local offices before moving to Head Office where he has worked in a variety of policy and operational roles.



Karen Thomson

Karen has 12 years experience in payroll and pensions, latterly at Carlisle City Council.

She joined the Policy & Research team of the Institute of Payroll Professionals in March 2003 and is responsible for assisting members via writing News On Line and regular Payroll Professional articles.

She also looks after all IPP consultation with the Department of Work and Pensions and the Scottish Parliament.



Gordon Michie

Gordon is Director of Development at R Fundraising, having been at the forefront of committed giving programmes over the last 15 years, with specific interest in acquisition routes backed by good stewardship.

In 2007 he published Barriers to the Steward Throne which explores what stewardship means in a UK fundraising context and in 1999 as fundraiser at AICR he introduced f2f fundraising.

A Trustee of the Institute of Fundraising, Gordon is a past Chair of the Scottish Fundraising Conference and in spring 2012 Gordon was appointed to the General Council of Erskine, a veterans charity based in Bishopton, Renfrewshire.



Dr Beth Breeze

Dr Beth Breeze is an academic researcher who specialises in philanthropy.

She worked within the ESRC Centre for Charitable Giving and Philanthropy from 2008 to 2013 and has recently begun a Leverhulme Trust-funded Early Career Fellowship for a project, The Formation of Fundraisers: role of personal skills in asking for money. She co-founded, and is now Director of the Centre for Philanthropy at the University of Kent where she also teaches courses on volunteering, fundraising and philanthropy.



Ceri Edwards

Ceri Edwards is Director of Policy & Communications at the Institute of Fundraising.

He has responsibility for the Institute's policy and communications work: promoting the organisation, its work and reputation and making sure its views, and those of its members, contribute to opinion forming and decision making across the sector and beyond.

He's also responsible for the Code of Fundraising Practice and the IoF Standards Committee.



Royal Mail have been a part of the UK community for over 400 years. Their extensive workforce lives, works and delivers across the breadth of the UK. They have almost 150,000 employees across the UK, working through over 1,400 sites and their people reach almost every doorstep in the UK.

With over 40,000 Royal Mail colleagues and pensioners contributing over £2.5m to good causes through Payroll Giving, it is clear that sustained commitment over time is the only way such an impressive result is possible. Dedication, coordination, and integration over 25 years has produced an exemplary Payroll Giving programme of which Royal Mail Group can be immensely proud.



Bibby Line Group is a diverse, global portfolio of companies involved in business services and asset management, with operations in 22 countries.

 Clydesdale Bank |  Yorkshire Bank

Clydesdale & Yorkshire Banks are part of the National Australia Bank Group of companies. They have 7,484 employees over 420 sites across the UK.

For the employer with more than 1,000 employees that has sustained and grown a workplace Payroll Giving scheme for more than two years. The successful employer will have evaluated their methods of recruiting and retaining Payroll Givers and have delivered ongoing promotional activities since launching the scheme.

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Shortlisted

Citi Group
Deutsche Bank



For the employer with up to 1,000 employees that has sustained and grown a workplace Payroll Giving scheme for more than two years. The successful employer will have evaluated their methods of recruiting and retaining Payroll Givers and have delivered ongoing promotional activities since launching the scheme.

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PERITEMPS
PEOPLE DEVELOPMENT GROUP

Peritemps People Development Group hold contracts to deliver programmes that support those disadvantaged in society back into sustainable employment. They have around 700 staff working in some 40 locations across the UK, mainly in inner-city areas.

Driven by employees who "own" the scheme, Peritemps has now achieved an incredible 66% of staff participation who contribute £2500 a month. With the motto 'small and local makes the difference' Peritemps employees engage daily with a wide spectrum of customers who have connections to community groups, charities, or those volunteering to benefit others.



The Entertainer is the largest independent retailer of toys in the UK. The first store was opened in 1981 in Amersham, Buckinghamshire by Gary and Catherine Grant who are now the proud owners of over 70 stores and are continuing to grow. The Group now employs over 800 people.

The Entertainer launched their scheme in 2011 and after a fantastic start which saw 26% of employees join within the first three months they have ensured continued success and growth. With the number of their stores rising and a growing workforce The Entertainer have demonstrated their commitment to Payroll Giving by promoting and engaging with new employees and are seeing more and more staff join their scheme.



For the employer that has introduced a Payroll Giving scheme into the workplace between 1st April 2012 and the 31st March 2013 and shows the best integration of launch activities, promotion to staff and target achievement.

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**Charities Aid
Foundation**



EE is the UK's most advanced digital communications company with over 27 million customers – almost half of Britain – using their services every day. Their vision is to provide the best network and best service so their customers trust them with their digital lives.

Since the launch of their scheme in April 2012, EE's employees have given over £116,760 in the first year with the company contributing percentage top-ups. The launch of this scheme aligned the previous schemes of Orange and T-Mobile and increased participation to 7.3% from under 4%. Over 1,000 people donate more than £12,000 every month shared between 187 charities.



blackbaud
your passion > our purpose

For the past 30 years, Blackbaud have been developing software and services for not-for-profits. Their expertise is helping their 27,000 plus customers accomplish their missions in raising funds for the disadvantaged and those seeking support. Blackbaud Europe have 130 employees across 3 countries, and over 2,600 employees globally.

Blackbaud Europe Limited achieved the Gold Quality Mark in the first year of their new scheme. Embedding Payroll Giving in their organisational culture they plan to go from strength to strength with plans to roll it out further and are already aiming to achieve the Platinum Quality Mark next year.



For the employer that has reviewed a scheme and increased their overall participation rate by adopting an active and innovative approach. The successful employer will have evaluated their methods of recruiting Payroll Givers and have planned for regular, ongoing promotional activities.



British Land is one of Europe's largest Real Estate Investment Trusts. They own or manage a portfolio of prime commercial property worth £16.9 billion – focused primarily on high-quality retail locations and central London offices.

In 2012 British Land re-launched their Payroll Giving scheme with the aim of significantly increasing staff participation and donations. The results were fantastic, with a rise from 2% staff sign up in 2011/12 to 21% in 2012/13. With match funding from British Land, donations have reached over £72,000.



Founded in 1997, Mindshare was set up to pioneer and innovate in order to give clients a competitive advantage. They have been the world's fastest growing media agency and witnessed a true communications revolution. They have 400 employees based in London.



UKTV is the multi-award winning media company that reaches over 42 million viewers per month. They employ approximately 207 people based in their London offices.



For the employer with up to 1,000 employees that has carried out a well-constructed and thought-out promotion with measurable results. The category winner will be able to show how the campaign was introduced and the important factors impacting on the outcome. The winner will also be able to illustrate that the campaign included originality, innovation and creativity.



Checkatrade offers a free service that allows customers to find out background information they need to make a confident decision about which tradesmen to contact. They currently have more than 11,000 members on their website, and send over 105 printed directories annually with each going to more than 50,000 homes. They employ 88 people.

Taking inspiration from the fact that the amount people give is about the same that they spend on cheese, Checkatrade used 'National Cheese Day' as a key point in their campaign this year and even managed to get their CEO Kevin Byrne to dress up as a giant cheddar to engage staff and promote the scheme. Having received the Platinum Quality Mark for the last two years Checkatrade's employees now donate £7,900 each year to 27 different charities.



Henderson Global Investors is an international investment company, with a strong reputation and a proud history, going back to 1934. They currently manage £67.9 billion and employ more than 1,000 people worldwide, with 808 in the UK.

Henderson Global Investors Payroll Giving Scheme was set up in 2008. With the setting up of the Henderson Foundation in 2012, £10,000 match funding was provided to drive sign up by employees – they managed to surpass their target of 10% participation and now have 14.5% of employees enrolled in the scheme who together give over £7,000 every month.

Shortlisted

Newburgh Engineering
Petrofac Engineering



For the employer with more than 1,000 employees that has carried out a well-constructed and thought-out promotion with measurable results. The category winner will be able to show how the campaign was introduced and the important factors impacting on the outcome. The winner will also be able to illustrate that the campaign included originality, innovation and creativity.

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CAF Charities Aid Foundation



Network Rail took over Britain's railway network in October 2002 and inherited an infrastructure that had been starved of investment for many years. There are around 35,000 staff working hard at Network Rail to improve every aspect of the railway.

Network Rail's continued campaign has seen over 10% of their 33,992 employees donating £484,150 each year. They have achieved this by ensuring that every one of their employees knows that they offer the scheme through targeted, communications, site visits, focus on their intranet and engagement of Charity Ambassadors. With a workforce dispersed in over 400 sites across the UK, their achievements are hugely impressive.



Bank of America Merrill Lynch

Bank of America Merrill Lynch is a long-established participant in EMEA with a presence since 1922. With offices in over 30 cities it offers an integrated and comprehensive set of products and services, combining the best of local knowledge and global expertise.

A Payroll Giving scheme has been running since 2005 at Bank of America Merrill Lynch with 686 employees donating each month and the company matching the donations. This campaign in January 2013 offered all employees the opportunity to donate part of their annual discretionary bonus to charity through payroll. Over 8% of their UK workforce made one-off donations in just one week supporting 465 local and national charities.

Shortlisted

BrightHouse
Experian



For the public sector employer that has carried out a well-constructed and thought-out promotion with measurable results. The category winner will be able to show how the campaign was introduced and the important factors impacting on the outcome. The winner will also be able to illustrate that the campaign included originality, innovation and creativity.



HM Revenue & Customs

HMRC is one of the largest central government departments. It was created in 2005, bringing together the work, resources and people of the Inland Revenue and HM Customs & Excise. In March 2013 they had a headcount of 72,742 staff in almost 400 offices, spread across the UK.

HMRC has a long-standing commitment to payroll giving, maintaining its Gold Quality Mark Award for the sixth year in a row and with their employees donating more than £4.5 million since 2007. The judges were particularly impressed with the campaign pilot undertaken with the Cabinet Office's Behavioural Insights Team to understand better what makes people donate: striking results included the impact of simply using a photo of an existing donor in a promotional message which more than doubled the numbers of those signing-up. A fantastic example for all public sector employers.



For the civil society employer that has carried out a well-constructed and thought-out promotion with measurable results. The category winner will be able to show how the campaign was introduced and the important factors impacting on the outcome. The winner will also be able to illustrate that the campaign included originality, innovation and creativity.



WaterAid is an international charity focused exclusively on helping poor people gain access to clean water, improved sanitation and hygiene. WaterAid's head office is in London where 225 staff are based, 4 staff in a Scotland office and further individuals across the UK.

WaterAid built on their previous Payroll Giving promotions with this year's campaign being led and promoted by the HR team, rather than by the Payroll Giving manager which gave extra weight to the campaign and strongly demonstrated WaterAid's commitment to the scheme. With the help of coordinated communications, the involvement of the CEO, and simple but effective engagement on the promotion day, uptake of the scheme by employees more than doubled



Help the Hospices is the leading charity supporting hospice care throughout the UK, wanting the very best care to everyone facing the end of life. They support their members and other organisations as they strive to grow and improve end of life care across the UK and the world.

Working closely with the HR and Finance teams they made sure that they made best use of the internal communications channels, including leaflets, posters, emails, and including information on payslips. As well as surpassing their uptake target of 10%, by improving awareness and knowledge of Payroll Giving among their staff has led to two of their corporate partners now planning their own campaigns.



For a Payroll Giving promotion which was successful as a result of a partnership between the employer and any other organisation, including a Payroll Giving Agency, Professional Fundraising Organisation, Charity or Charity Consortium or other external partner. The category winner will need to illustrate the expectations and outcomes of the partnership, in particular highlighting innovation and creativity, but also indicating the benefits this brought to all concerned.



with



Experian is the leading global information services company, providing data and analytical tools to clients around the world.

Hands on helping is an award winning Professional Fundraising Organisation (PFO) raising funds for charity by promoting Payroll Giving.

A sustained re-launch and re-brand of Experian's Payroll Giving scheme with Hands on Helping saw the introduction of the Experian Rocket to give Payroll Giving a distinct brand identify. Promotional materials followed, such as silver stress balls, and playful puns and giveaways. In December 2012 their 'Be a Star this Christmas' theme looked to engage with staff further by entering existing donors and new joiners into a prize draw and emphasised Experian's match funding. This commitment to Payroll Giving has seen Experian achieve the Gold Quality Mark this year with 436 employees participating in the scheme.



with



Workplace Giving UK

The Entertainer is the largest independent retailer of toys in the UK, now employing over 800 people.

Workplace Giving UK helps employees and employers support good causes in the most tax-efficient way – by giving directly from their pay.

The Entertainer's campaign included a 'Great Entertainer Charity Bake Off' involving every store and engagement with over 35 MPs to cut the cakes, increased employer matching, and visits to Great Ormond Street for staff increasing employee take up to 36%.

Shortlisted

Firstsource with
StC Payroll Giving



For an individual in an organisation whose contribution has significantly helped to make Payroll Giving successful in that organisation. The category winner will have illustrated what was achieved by way of number of employees signed up, money raised and the innovation, creativity and commitment shown.

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Jacqui Atkinson

 Clydesdale Bank |  Yorkshire Bank

Jacqui has driven the mechanism of payroll giving at Clydesdale & Yorkshire Banks tirelessly over many years, taking the scheme from minimal employee participation to the highest rate of any high street bank in a short space of time.

Jacqui was instrumental in securing a £ for £ matching budget in 2005, and ensuring this was continued. She has also championed the scheme both internally and on our external reports and websites.



Suzanne Hardy



Suzanne has consistently demonstrated a passion for payroll giving that has delivered highly successful schemes at National Rail, and previously at Royal Mail.

Suzanne successfully increased the percentage of the workforce signed up to the schemes by a substantial amount at both organisations, leading to both having achieved a 'Best Re-Launch Award' at past National Payroll Giving Excellence Awards.



**HM Revenue
& Customs**

Harriet Stevens

Harriet has single-handedly driven forward HMRC's payroll giving campaign, infusing it with pace, visibility and innovation.

As a result, over 6 years HMR staff have donated more than £4.5million to charity via payroll giving.



This award will be allocated by judges if appropriate and the selection will be made from the winners of all the other categories.



Royal Mail Group's 25 years of commitment to Payroll Giving is a remarkable success and with almost £48 million donated from employees over that time Royal Mail Group are a worthy winner of 'Best Overall Campaign'. Over 1,000 charities have been supported from the generosity of staff and a continued effort to sustain and promote Payroll Giving by the organisation continues to drive participation and raise awareness among staff.



British Land re-launched and enhanced their Payroll Giving offer in July 2012, with the aim of significantly increasing staff participation and donations. 21% of staff signed up in 2012/13, an impressive rise from 2% in 2011/12. Including British Land match funding, staff have since donated £72,000 to an array of good causes. Many of their employees have also embarked on volunteering activities and fundraising initiatives for the causes they support.



A strong ethos through Peremps on improving the lives of the people they work with underpins an incredibly successful Payroll Giving scheme and has embedded itself in their employees' continued commitment to give through Payroll Giving.

The Platinum Quality Mark Award recognises employers that continually strive to increase donations to UK charities through Payroll Giving...

PLATINUM AWARD 2013



ACF Car Finance Limited

AES Kilroot Power Ltd

Alexander Forbes

Allstate NI Ltd

AMV

Andrew Mcmanus

Angel Trains Ltd

Arnold Clarke Automobiles Limited

Asos

Aspect Capital

Babson Capital Europe Ltd

Bain & Co

Beaverbrook

Bel UK

Bonfire Design Ltd

Bell Fundraising

BT

Cambria Automobile Holdings Limited

Charities Trust

Clydesdale Bank

CMS Cameron Mckenna

Deutsche Bank

ECGD

Edwards & Co Solicitors

Fundraising Initiatives

General Conference of SDA – TED

Guardian News and Media

Hands on Helping

Haygarth

Henderson Group

I-Transport LLP

JP Morgan

Jti

Lloyds

Majedie Asset

McGimpsey Brothers (Removals) Limited

Michael Page

Mondrian Investment Partners Ltd

Pertemps People Development

Police Service of Northern Ireland

Prudential

Publisher Licensing

PX Limited – Tina Rowarth

Robert Holdcroft

Royal Mail

Royal Navy

Santander

Standard Chartered Bank

Stream Global Services

Telereal Trillium

The Entertainer

The Forum of Private Business Ltd

The Royal Bank of Scotland

Vetted Ltd T/AS Checktrade.com

Warburtons

Warner Bros

Workplace Giving UK

World First

Yorkshire Bank

Zurich Community Trust (UK) Limited

Z/Yen Group Limited

APPLAUDING THE ACHIEVEMENTS OF EVERYONE INVOLVED IN PAYROLL GIVING

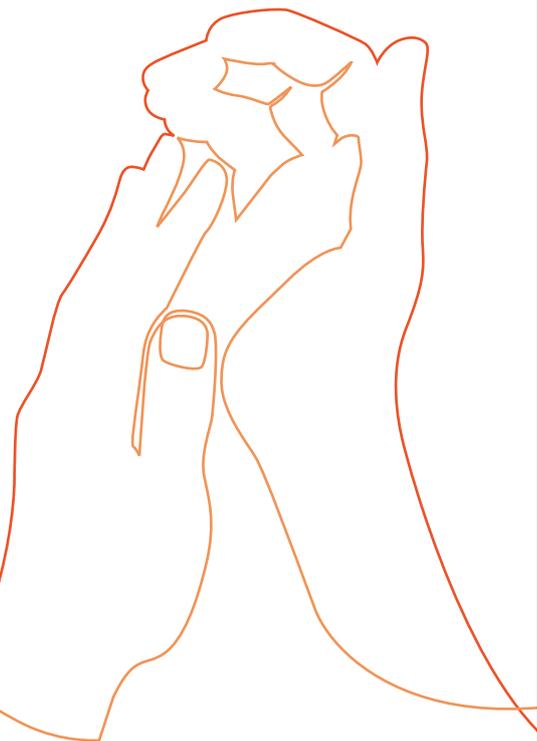
*Be proud of the difference you
and your employees have made*

Last year CAF Give As You Earn® donors generously gave £70 million to charitable organisations.

On behalf of all those great causes we would like to say thank you.

These donations provide valuable funding streams on which charities depend. We encourage you and your employees to celebrate your achievements for 2013 and keep up the good work in 2014.

Well done and thank you.



1422A/1113
T: 03000 123 000
E: giveasyouearn@cafonline.org

www.cafonline.org

Registered charity number 268369

CAF Charities Aid
Foundation

we love payroll giving

Here we are at the close of another year, and what a year!

Charities' financial practices have never before been under such scrutiny; transparency, trust and greater confidence are central to a healthy relationship between charities and their supporters – it's what encourages people to engage and feel good about giving.

And, if we needed reminding to have faith in the basic goodness of the people of the UK, even when their own household budget is under pressure, we only have to look at the response to the Philippines disaster. In a matter of just 9 days some £55 million had been raised. The disaster fund 'clashed' with BBC's Children in Need, yet Pudsey still netted a record total of £31 million.

At Charities Trust, we'd argue there's no better business to be in and we feel very privileged; our job is to protect the money people have worked so hard to raise or been generous enough to donate from their own pocket, and make sure we make every penny count. We are proud of the fact that in excess of 98p of every Payroll Giving £1 that Charities Trust process makes its way to the donor's charity of choice.

Payroll Giving has remained under the Government spotlight this year – we welcome this attention. We were there when Payroll Giving was born 26 years ago – but there's more to do and we're here to help drive the changes that will make it an even stronger partner for the thousands of charities it supports year in, year out.

Payroll Giving isn't the only service we're innovating; we're working to improve and build products and services that deliver ever simpler tools for fundraising. And we're sticking to our core aim: to grow the giving market.

The great work that you're doing needs to be recognised so that others can be inspired and encouraged, so there's no doubt the Quality Mark and Excellence Awards are important.

As part of our commitment to supporting and promoting Payroll Giving, we have sponsored the Most Successful Sustained Scheme and Best Individual Contribution Awards.

The winner of the 'Best Individual Contribution to Payroll Giving' will receive a £1,000 donation from Charities Trust into their very own My Giving Account, which they can then give to the charity of their choice, in recognition of the contribution that they continue to make in support of Payroll Giving.

While we will warmly congratulate this year's winners, we also want to thank those who daily harness their passion and flair to drive giving market growth.



Linda Minnis
Chief Executive

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My Giving Account
by **Charities Trust**
www.mygivingaccount.co.uk

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About the Institute of Fundraising

The **Institute of Fundraising** is the professional membership body for UK fundraising, working to promote the highest standards in fundraising practice. The **Institute of Fundraising's** mission is to support fundraisers, through leadership, representation, standards setting and education, to deliver excellent fundraising.

Committed to raising standards in fundraising practice and management, we engage with charities, Government, media, the general public and other bodies to influence the UK fundraising environment positively. We work to nurture the knowledge and standards of all those who undertake fundraising, offering an extensive range of training and networking opportunities.

Thank You

We would like to thank this year's host of the National Payroll Giving Excellence Awards, Nicky Morgan MP, Economic Secretary to the Treasury and Nick Hurd MP, Minister for Civil Society.

Thank you to our sponsors, Charities Trust and Charities Aid Foundation, for their support of the 2013 National Payroll Giving Excellence Awards.

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