

More about Heroix and Charity Challenge

The basics

What is Heroix?

Heroix is award-winning Blackbaud software that allows not-for-profits to create fully branded online fundraising websites in minutes.

As a low-cost user-friendly solution that requires no 'developer' skills, Heroix has a simple, easy-to-use content management system that puts you in full control of your online fundraising websites and can be used by all members of your fundraising, events, and marketing team.

Heroix can be used to build websites to support Peer-to-Peer fundraising events, Appeals and In Memoriam giving. It is cleverly integrated with social media and has a flexible report builder that easily maps your supporter and donor data to your CRM or donor management system.

Who uses it?

Since launching in 2007, Heroix has been used by hundreds of charities in the UK, and even more charities and event management companies in Australia and New Zealand to support fundraising events large and small.



The most notable UK customer is Walk the Walk, a grant-making breast cancer charity which raises the majority of its funds through its own iconic MoonWalk and SunWalk events.

Until 2009, Walk the Walk had prompted their supporters to use third party sites to build unbranded online fundraising pages for their events, the donation revenue from which, totalled approximately £2.7 million.

Using Heroix meant Walk the Walk could develop a fully-branded and customisable online fundraising system, enabling supporters to build beautiful charity-branded Walk the Walk fundraising pages with integrated social media functionality. With Heroix in place, Walk the Walk raised more than £3.5 million in 2010 and over £4 million in 2012.

For more details, please see the case studies on [Walk the Walk](#) and [Moonwalk London](#).

Who is Everyday Hero and what is Blackbaud's role in all of this?

Heroix is a product of Everyday Hero, a Blackbaud company. The benefit for many charities includes tight integration between Heroix and The Raiser's Edge, the leading donor database in the UK and worldwide.

For more information visit <http://heroix.co.uk/> and www.blackbaud.co.uk/.

Who is Charity Challenge?

Charity Challenge is the world's leading fundraising challenge operator, organising treks, bike rides, mountain climbs, running, dog sledding, rafting, canoeing, snow shoeing and sledge hauling challenges around the globe.



They have raised over £38 million for UK, Irish and Canadian charities and were voted Best Challenge company in the 2013 Institute of Fundraising Partners in Fundraising Awards.

Best known for organising the Comic Relief celebrity climb of Kilimanjaro and the more recent Zambezi Hell and High Water challenge, they run over 100 expeditions a year from trekking to Machu Picchu, through the Sahara or on the Great Wall, cycling from Havana to Trinidad or skiing to the North or South Pole.

For more information visit www.charitychallenge.com.

The benefits

Why should I choose Heroix for my Charity Challenge events?

There are many reasons to work with Heroix, including:

- Lower fees than Just Giving. No fees on Gift Aid.
- Superior branding for microsite and supporter pages. Your brand is front and centre.
- Advanced reporting and access to 100% of supporter and donor data. Heroix provides the data so you can manage the donor journey.
- Control of design, content, and messaging direct to supporter pages.
- Custom URLs.
- Dedicated marketing support for events. Award winning product support.

Additionally, only Heroix and Charity Challenge together offer the Disbursement facility (see below), which enables charities to fundraise through challenge events without having to budget for challenge event costs.

What is the Disbursement facility?

For most challenge style events, the participant pays a deposit and commits to raising a minimum amount for a named not-for-profit. A few months before departure, if the participant has achieved a pre agreed target, the challenge operator will invoice the not-for-profit for the balance of their challenge event costs.

For example, the cost of a trek is £2000. The participant pays a deposit of £500 to Charity Challenge to book their place and commits to raising £3500 for your cause. Two months before departure, if the participant has achieved their fundraising goal, you are invoiced for the remaining £1500 of challenge costs (43% of the minimum sponsorship) and you retain the profit of £2000 (57% of the minimum sponsorship).

In summary, the charity accounts are as follows:

- Sponsorship income: £3500 (assuming the participant only raises the minimum required)
- Challenge cost: £1500 (43%)
- Net donation: £2000 (57%)

With the disbursement facility, participants will pay the same deposit to Charity Challenge to book their place, and raise the same £3500 for your cause. Heroix will process the funds on your behalf and Everyday Hero will hold the funds in a trust account. Two months before departure, you tell Everyday Hero who has hit their target, and Everyday Hero disburses the challenge costs to Charity Challenge and the net donation to you.

In this case, the charity accounts are as follows:

- Sponsorship income: £2000 (assuming the participant only raises the minimum required)
- Challenge cost: £0 (0%)
- Net Donation: £2000 (100%)

Apart from reducing fundraising ratios, what are the other benefits of the Disbursement facility?

For many charities, if they don't agree "costs" in the budget in advance, they cannot allow groups to fundraise through challenges due to the impact of having to pay the challenge costs to the challenge provider.

Other charities are even more limited in that they cannot operate ANY fundraising activities that incur direct event costs.

With Disbursement, the charity only needs to record the income it receives and so can now accept short notice, unplanned groups who want to take on a challenge. The Disbursement facility enables more charities to benefit from challenge event fundraising, one of the fastest growing segments of the fundraising sector.

Do we have to use the Disbursement facility?

No. If you would like to use Heroix but do not need to take advantage of the Disbursement facility, you can work with us using the more traditional model.

Can we use Heroix if we are not participating in a Charity Challenge event?

You can use the Heroix platform to support your online fundraising needs for any event, including challenges that are not operated by Charity Challenge. However, the Disbursement facility is only available to use on expeditions operated by Charity Challenge.

Where do we start?

Who do I call to start using it?

To get started working with Charity Challenge and Heroix, please contact Chad Anderson (chad@charitychallenge.com).

How much does it cost to set up a Heroix-powered charity branded site?

There are no setup costs for a standard configuration of Heroix – it's free to sign up and you can begin fundraising immediately.

Whilst we most often use your existing site designs, in some cases, charities are interested in design services to get the best look and feel for the site. We are happy to discuss this optional service with you.

How long does it take to set up a charity branded site?

Once the paperwork is complete, the turnaround time for set-up is typically 2 to 3 hours. Factoring in the workload of our Everyday Hero Account Management team, we aim to move from set-up request to completed site within two business days.

What are the ongoing costs for Heroix?

The ongoing costs are transactional in nature and will be confirmed at point of registration in an official Service Level Agreement. For the Charity Challenge partnership they are:

- Service Fee for use of Heroix: 4.75% (on the donation only, not Gift Aid)
- Credit Card Fee: 1.6% on Visa, Mastercard, Maestro; 2.8% on Amex
- Debit Card Fee: 16 pence per transaction

Do I need training?

A comprehensive training session with one of our account team members is provided free of charge. Training sessions are delivered online and we invite any of your team members likely to use Heroix to attend.

The training programme covers an end-to-end run through of Heroix, from creating a fundraising campaign through to customising your data to match your existing CRM system.

Refresher courses or training for new staff can be provided at an additional cost.

Who answers my questions?

Our UK-based, Everyday Hero Account Management team is available by phone or email. They are happy to demonstrate the product to you, set up events and appeals, give instructions and guidance on how to use the product and troubleshoot any issues you may encounter.

Whilst Heroix is designed to be intuitive and simple to administrate, we also provide technical product support through our award winning Glasgow-based Support Team.

We also provide valuable fundraising tips and other resources online. See the [resource](http://heroix.co.uk) section of <http://heroix.co.uk>.

My data

Do you capture supporter and donor data?

Heroix collects supporter, donor, and donation data. This data is protected under our data policy. Everyday Hero will never sell your data or market other products or services to your supporters or donors.

Do you provide me with the data?

The supporter and donor data for events related to your charity belongs to you.

Using the Heroix Custom Reporting tool, 100% of supporter and donor data can be accessed by the charity at any point, in real time. Predefined Reports include:

PREDEFINED REPORTS	
Direct Donation Product Report	A report showing donations and details for the direct donation product
Donation Detail Report	A report showing donor and donation detail. Run by event and/or date range
Event Summary	A report showing specified events
Fundraiser Summary	A report showing specified fundraising pages
Gift Aid R68 Form	Download the latest version of the R68 from HMRC
Gift-Aid Detail Reports	Summary of Gift Aid donations for period. To be submitted with your R68 form
Remittance Advice and Transaction Reports	Download received statements and transaction reports
Supporter Detail	Supporter name and contact details for opt-in donors.
The Raiser's Edge	For importing directly into The Raiser's Edge
The Raiser's Edge v1.1 (beta)	For importing directly into The Raiser's Edge, with added information

Custom reports can also be generated by you.

Any additional information required would be detailed in the Service Level Agreement and the charity's Disbursement Directive.

You will also receive support from the Everyday Hero Financial Team in line with the Disbursement Directive. Please note that this team is currently based in Australia.

How does the software integrate with our CRM system?

For charities that use The Raiser's Edge, a Raiser's Edge plug-in is provided that makes it very straightforward to import Heroix data into The Raiser's Edge.

For charities using other donor databases and CRM systems, Heroix provides real-time access to all collected data and the ability to export this data from Heroix in .csv format for import into your system.

Disbursements and Gift Aid

Why is the money held in trust?

Supporters will be raising funds through Heroix for months prior to the event. Ten weeks prior to the event, as is the standard process for Charity Challenge, the charity will review the amount raised by each supporter to determine who has qualified to participate in the event. Once Everyday Hero receives a list of confirmed participants, the disbursement of funds can be made (within 7 business days). All funds processed up until this point are held in trust for safekeeping.

Any additional donations received after the confirmation will be disbursed directly to the charity as per our standard fortnightly disbursement process.

What happens to the funds if the participant does not reach their target?

All of the funds will be released to the charity as per the Disbursement directive, and the process will be the same as it is now. Charity Challenge will arrange for either a postponement or cancellation of the booking, and the charity will retain or refund the donations according to their normal process.

What happens if someone cancels their challenge?

As above, all of the funds will be released to the charity as per the Disbursement directive, Charity Challenge will cancel the booking and the charity will retain or refund the donations according to their normal process.

Will we still be able to collect Gift Aid on all donations?

In the standard configuration, Heroix will process 100% of gift transactions as donations, issue receipts, and mark the transactions as Gift Aid eligible if the donor consents.

If the charity would prefer a different approach, the charity will have access to the data and the travel costs per fundraiser should they choose to not claim Gift Aid on 100% of donations. It is important to remember that not all donations are Gift Aid eligible (typically about 75%+ are eligible).

In a situation where a charity does not wish to claim Gift Aid for challenges, we can disable the Gift Aid feature in their Heroix account.

HMRC have confirmed that all donations may be Gift Aid eligible, aside from those made by persons connected to the fundraiser, which is UK law. According to the Charity Commission, the charity would then make its own decisions about reporting tour expenses.

Does Heroix handle Gift Aid processing?

Heroix can produce a Gift Aid report for all donations marked as gift aid eligible, ready for submission to HMRC. If you do not wish to claim Gift Aid on 100% of marked donations, you can generate your own Gift Aid reports from the data available.

This feature allows you to lodge your own Gift Aid claim, and we do not deduct a percentage from the claim, unlike other providers.

If you prefer, Everyday Hero can submit Gift Aid claims on 100% of eligible donations, on your behalf. We process gift aid claims quarterly for a flat fee of £150 per quarter