

**Ethical fundraising policy**

**(Revised August 2015)**

**General Principles**

Fundraising professionals have a responsibility to their donors, their employer, and their cause. All those involved in raising funds for the Iona School must be guided by their sense of personal integrity and by relationships with their donors. At the heart of fundraising ethics lies the need to ensure that the trust of the donor is not violated, which requires openness, transparency and respect. The following ethical policy is designed to this end.

Iona School raises money through fundraising to support the operational life of the school.

In order to reach our goal percentage we approach the following donors:

- Current students and their families
- former students and their families
- we fundraise in the wider community
- we approach the Lottery funders
- we approach grant-making trusts and foundations

Members of the Iona School community who are involved in fundraising will:

1. Observe all appropriate legal and ethical requirements as laid down by the Iona School and such other appropriate bodies involved in fundraising.
2. Follow all Iona School policies and codes relating to Equal Opportunities, Personal Harassment & Bullying, Health and Safety, Employment, Grievance, and Public Interest Disclosure.
3. Report any conflict of interest, whether actual or prospective, to the School Manager.
4. Be aware that the Iona School reserves the right to reject any donation offered.
5. Fundraising solicitations on behalf of the Iona School will be truthful; accurately describe the Iona School's activities and the intended use of donated funds; and respect the dignity and privacy of those who benefit from the Iona School's activities.
6. The Iona School will not sell its donor list.

**Donor's Rights**

- All fundraising solicitations by or on behalf of the Iona School will disclose the Iona School's name and purpose for which the funds are requested. Printed solicitations (however transmitted) will also include its address or other contact information.
- Donors and prospective donors are entitled to the following, promptly upon request the most recent annual report and financial statements; confirmation of the charitable status of the Iona School; a copy of this ethics code.
- Donors and prospective donors are entitled to know, upon request, whether an individual soliciting funds on behalf of the Iona School is a volunteer, an employee or a hired solicitor.
- Donors will be encouraged to seek independent advice if the Iona School has any reason to believe that a proposed gift might significantly affect the donor's financial position, taxable income, or relationship with other family members.
- Donor's requests to remain anonymous will be respected.

- The privacy of donors will be respected. Any donor records that are maintained by the University will be kept confidential to the greatest extent possible. Donors have the right to see their own donor record, and to challenge its accuracy.
- Donors and prospective donors will be treated with respect. Every effort will be made to honour their requests to limit the frequency of solicitations; not to be solicited by telephone or other technology; receive printed material concerning the University.

The Iona School will respond promptly to a complaint by a donor or prospective donor about any matter that is addressed in this ethics policy. A member of the Fundraising Team will attempt to satisfy the complainant's concerns in the first instance. A complainant who remains dissatisfied will be informed that he/she may appeal in writing to the School Manager.

- The Iona School will comply with The Data Protection Act and The Freedom of Information Act.

### **Financial Accountability**

- The Iona School's financial affairs will be conducted in a responsible manner, consistent with the ethical obligations of stewardship and the legal requirements of national regulators.
- All donations will be used to support the ethos and development plan of the Iona School.
- All restricted or designated donations will be used for the purposes for which they are given. If necessary due to programme or organisational changes, alternative uses will be discussed where possible with the donor or the donor's legal designate. If the donor is deceased or legally incompetent, and the Iona School is unable to contact a legal designate, the donation will be used in a manner that is as consistent as possible with the donor's original intent.
- Annual financial reports will be factual and accurate in all material respects and disclose: the total amount of fundraising revenues; the total amount of fundraising expenses; identify government grants and contributions separately from other donations; be prepared in accordance with generally accepted accounting principles and standards.
- The cost effectiveness of the Iona School's fundraising programme will be reviewed regularly by the Communications Manager/College of Teachers.
- All donation accounts will be subject to regular Internal and External Audit.

### **Tokens of thanks**

From time to time, supporters of the Iona School may wish to make gifts to staff or other Iona School representatives, which whom they have worked. It is recognised that to refuse such items may cause misunderstanding or offence and hence be contrary to the work of the Fundraising Team.

- Iona School staff and members of the school community should generally decline all offers of gifts, other than those of a very small intrinsic value.
- Gifts of money must always be refused.

All offers of gifts with a greater value than £25 should be reported in writing to the School Manager. A register of these offers will be kept and an annual report submitted to the College of Teachers and Trustees.

### Acceptance of donations

The Iona School operates on the principle that organisations' past transgressions may be mitigated by current efforts, as ethical improvements can only be achieved through engagement. The Ultimate responsibility to accept or decline a donation resides with the College of Teachers.

The Iona School will only decline a donation if it is felt that the gift:

- Does not support the objectives of the Iona School or its agreed policies;
- Would lead to a demonstrable net decline in the assets of the Iona School;
- Consists of goods, property or services, which the Iona School cannot lawfully use, convert, Sell or exchange in direct support of its aims;
- Is dependent on the fulfilment of unacceptable conditions applied by the donor.

### Repayments of donations

Where a change in circumstances prompts a donor to request the repayment of all or part of a donation, the final decision will rest with the College of Teachers. Once the Iona school has accepted the donation it can only be returned if:

- The terms and conditions of the gift provided for it to be returned under particular circumstances;
- The law specifically provides for the donation to be returned, for example under section 61 of the Charities Act 1992, donations over £50 made by debit or credit card are subject to a seven day cooling-off period.
- The Iona School is limited in its ability to return gifts by Money Laundering legislation and therefore funds can only be returned directly to the donor and to the account from which the funds were originally paid.

### Issue date

This policy takes effect from May 2010

### Review date

This policy will be reviewed and revised by the school manager on an annual basis.

### Endorsement

Full endorsement to this policy is given by:

Name:	Mr Martin Taylor
Position:	Iona School Trustee
Signed:	
Date:	07/08/2018

Related policies

Financial policy