Ethical Fundraising and Gift Acceptance Policy

The Abbey School, Reading

Reviewed by:	Head of Engagement and Development	April 2025
Ratified by:	Whole School Leadership Committee and Governor Audit	April 2025
Next review: April 2027		

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Registered Charity No 309115.

1 Scope

1.1 This policy relates to all fundraising activities undertaken directly by The Abbey School through the Marketing, Admissions, Development and Engagement Team for the benefit of the School.

2 Policy statement

2.1 Our fundraising approach is to act fairly, transparently and ethically in the best interests of serving the School's charitable objectives and those in our community. We will always aim to follow best practice, and in doing so abide by specific fundraising law.

2.2 Above all, we value most highly the relationships we have with members of The Abbey School community, including current students and parents, alumnae and former parents, friends of the school and more widely our community and business partners. We will always seek to protect our relationship with our supporters and in doing so to treat them with respect and integrity.

3 Introduction

3.1 The Governing Body of The Abbey School, Reading (The Abbey) welcomes offers of donations of all sizes, which enable its continuing development and bursary funding. All fundraising solicitations are undertaken through the school's Marketing, Admissions, Development and Engagement Office. It commits to undertake all fundraising activity ethically and in line with best practice. Donations should be made to The Abbey School, Reading, registered charity number 309115.

3.2 The Governors are pleased to accept lawful donations which are given in good faith and which are compatible with the school's aims, values and strategic objectives. Donations must be freely given with no expectation of anything in return other than due thanks and recognition. The Governors do not accept donations when a condition of acceptance would compromise its autonomy, integrity and reputation.

3.3 This policy seeks to outline the principles by which The Abbey's Marketing, Admissions, Development and Engagement Office will or will not pursue potential donations, and to establish guidelines governing potentially controversial gifts or donors.

3.4 Its purpose is to give prospective donors the greatest freedom possible in formulating their gifts, whilst safeguarding the best interests of The Abbey.

4 Ethical Fundraising Principles

4.1 Gift solicitation

4.1.1 Fundraising solicitations on behalf of The Abbey will:

- be truthful;
- accurately describe the intended use of donated funds;
- respect the dignity of the donor and of those who benefit from the school's activities; and
- be made in accordance with any applicable requirements under charity law and the Code of Fundraising Practice.

4.1.2 Volunteers and employees who solicit funds on behalf of the school shall:

- adhere to the provisions of these guidelines;
- act with fairness, integrity, and in accordance with all applicable laws;
- adhere to the provisions of any applicable professional codes of ethical practice which apply to them as individuals;
- cease solicitation of a prospective donor who identifies solicitation as harassment or undue pressure;
- disclose immediately to the Head and Governing Body any conflict of interest; and
- not accept donations for purposes that are inconsistent with the school's strategic and educational objectives.

4.1.3 Paid fundraisers, whether employed staff, short-term contractors or consultants, will not be paid finders' fees, commissions or other payments based on either the number of gifts received or the value of funds raised. They will be compensated by a salary, hourly wage or fee. Their compensation will be consistent with the school's policies and practices that apply to non-fundraising personnel.

4.1.4 Those soliciting donations on behalf of the school will take all reasonable steps to treat donors fairly, enabling them to make an informed decision about any donation. This will include taking into account the needs of any potential donor who may be in a vulnerable circumstance or require additional care and support to make an informed decision.

4.2 Donors

4.2.1 Donors will be encouraged to seek independent advice if the 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.

4.2.2 The Abbey is not responsible for the financial, tax or legal position of donors or prospective donors in relation to their gifts. Donors or prospective donors must take such advice as they deem necessary.

4.2.3 Where a change in circumstances prompts a donor to request the payment of part or all of a donation, the final decision to repay will rest with the Governing Body.

4.2.4 In cases where a donor wishes to remain anonymous, such anonymity will be respected for all public purposes. The school will, however, disclose details of any donor where it is required to do so by law, by any governmental or other regulatory authority, or by order of a court. The identity of anonymous donors will be known only to the Head, the Head of Engagement and Development and the Chair of Governors, and to those school staff who process the gift.

4.3 Data

4.3.1 On receipt of a gift, the details recorded in the donor's record on The Abbey School Marketing, Admissions, Development and , Office database will include, but are not restricted to: amount of gift, date, whether or not it is eligible for Gift Aid, purpose for which it has been given, the mechanism by which it was given, and whether or not the donor wishes to remain anonymous.

4.3.2 Any donor records held by The Abbey's Marketing, Admissions, Development and Engagement Office will be maintained in accordance with the school's 'Fundraising and Development Privacy Notice' which can be found on the school website www.theabbey.co.uk/policies and all relevant statutory legislation.

4.3.3 The school will not sell its donor and alumnae lists and contact details.

4.4 Use of gifts

4.4.1 All donations given for a specific purpose ('Restricted Gifts') will be used for that purpose. If necessary, due to programme or organisational changes, alternative uses or extensions to timescales will be discussed where possible with the donor(s). If a donor is deceased, and the Marketing, Admissions, Development and Engagement Office 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.

4.4.2 Unrestricted gifts may be expended on any purposes approved by the Governors.

4.4.3 The Marketing, Admissions, Development and Engagement Office will work with the Business Leadership Team (which includes the Head, Head of Finance & Resources and the Finance Director) and the Governors to ensure gifts are used according to the reasonable wishes of the donor, subject to any unforeseen changes in circumstances, policies or needs since the gift was made.

4.4.4 Donors accept that the management and governance of programmes and activities funded through donations rests solely with The Abbey.

4.5 Complaints

4.5.1 The Marketing, Admissions, Development and Engagement Office will respond promptly (within 30 days) to any complaint by a donor or prospective donor about any matter that is addressed in this policy. The Head of Engagement and Development will

attempt to satisfy the complainant's concerns in the first instance. A complainant who remains dissatisfied will be informed that they may appeal in writing to the Head, who will respond within a further 30 days. If the issue remains unsolved, the complainant may pursue the matter with the Governing Body.

4.5.2 The Governing Body will be informed at least termly of the number and nature of any complaints received from donors or prospective donors about matters that are addressed in these guidelines.

4.5.3 The Governing Body will be informed at least termly of the number and nature of any complaints made to the Fundraising Regulator about the School.

5 Gift Acceptance

5.1 The Governing Body encourages the solicitation and acceptance of gifts and grants that enable it to fulfil its strategic objectives. Gifts may be sought from individuals, corporations, and foundations. They will be sought only for purposes that have been approved by the school's Governing Body.

5.2 The school is legally obliged to adhere to the terms and conditions of every gift. For this reason, the terms of each gift must be considered with the utmost care to be sure any terms and conditions are feasible, do not unduly hamper the usefulness and desirability of the gift, and are in accordance with the school's policies.

5.3 The school is unable to accept gifts which are too restrictive in purpose or inconsistent with the stated academic purpose, priorities and strategic objectives of The Abbey.

5.4 Gifts that may expose The Abbey to adverse publicity, require expenditure beyond the school's resources, or involve the school in unexpected responsibilities because of their source, condition, or purposes, will not be accepted.

5.5 Gifts received by The Abbey must not inhibit it from accepting gifts from other donors. The school also cannot accept gifts which involve unlawful discrimination on any basis. Gifts that may result in current or future financial obligations for the school or that will have an impact on school facilities and grounds will require prior approval of the Governors. Gifts that involve naming a school facility will also require approval of the Governors.

5.6 The decision of a parent to make or not make a gift to the school will have no bearing on the academic, sporting or co-curricular opportunities open to an individual student. Gifts from prospective parents without a confirmed place will not be accepted.

5.7 To comply with money laundering and related legislation as might apply from time to time, the school might require donors and potential donors to provide reasonable proof of identity and, if necessary, furnish information as to the origin of the gift to be donated.

6 Potential Gifts Which May Have a Controversial Dimension

6.1 The following issues should be considered for all potential gifts and prospective donors which may have a controversial dimension:

6.1.1 Would acceptance of the potential gift be inconsistent with the school's strategic and educational objectives?

6.1.2 Is there published or other credible evidence that the proposed gift will be made from a source that arises from an activity that:

- Evaded taxation or involved fraud?
- Violated international conventions that bear on human rights?
- Limited freedom of enquiry or encroached on academic freedom?
- Was illegal in whole or part?
- Involved money laundering?
- Is inconsistent with the values and reputation of The Abbey?

6.1.3 Is there evidence that the proposed gift or any of its terms will:

- Require action that is illegal?
- Damage the reputation of the school?
- Create unacceptable conflicts of interest?
- Come with unacceptable expectations?
- Harm the school's relationship with its stakeholders (e.g. other donors, parents, students, staff, alumnae, or the local community)?

6.2 If the Head of Engagement and Development considers that the answer to any of the above questions might be yes, it is the Head of Engagement and Development's responsibility, at the earliest possible stage, to alert the Head. In consultation with the Chair of Governors, the Head will then decide whether or not further discussion should be pursued with the potential benefactor.

6.3 The Chair of Governors may at this stage decide to convene an ad hoc Gift Acceptance Committee comprising of the Head of Engagement and Development, the Head and at least two Governors. Prior to any meeting of the Gift Acceptance Committee, the Marketing, Admissions, Development and Engagement Office will provide members with a briefing, including reasonable due diligence on the donor. Appropriate professional research will be undertaken on potential donors to address issues of reputational risk if there are any concerns about the identity of the donor.

6.4 Gifts of sums greater than £1,000 are not accepted where the source is unknown to the Marketing, Admissions, Development and Engagement Office or cannot be verified.

7 Different Types of Gifts

7.1 Gifts are accepted in the following forms and with the following restrictions:

7.1.1 Cash

- In order to comply with money laundering regulations, cash donations of over £50 cannot be accepted. Cheques and card donations are accepted.

7.1.2 Real estate

- The school may accept a donation or legacy of unencumbered property.
- The Governing Body has a legal responsibility to act always in the best interest of the school. Donors should be aware that this may involve selling any donated land or property and using the proceeds to advance the school's strategic and educational objectives. For this reason, donors considering donations or legacies of real estate are encouraged to consult the Marketing, Admissions, Development and Engagement Office at an early stage.

7.1.3 Legacies

- A legacy is a gift of any amount or form made to The Abbey in a donor's will. Legacies may be residuary, pecuniary, specific legacy bequest, or reversionary.
- Donors should be aware that over the (sometimes many) years following the establishment of a legacy gift, the needs, policies, and circumstances of The Abbey can change in unforeseen ways. The Governors must have the flexibility to make use of funds in the best interests of the school, while doing so in accord with donor interests and specifications. For this reason, donors are advised to describe the specific purposes of their gifts as broadly as possible and to avoid detailed limitations and restrictions. Donors considering legacies for a specific purpose are encouraged to consult the Marketing, Admissions, Development and Engagement Office at an early stage.