

# Donor Charter and Ethical Guidelines for Fundraising



We are very grateful for the support we receive from all of our donors. Your contribution helps to ensure that our School can offer an outstanding education to children regardless of their family's circumstances, and that the opportunities and experiences we offer are inspirational. Thank you.

## The rights of our donors

1. All fundraising solicitations, by or on behalf of, St Peter's School, will disclose the School's name and clearly state the purpose for which the funds are requested. Printed or written solicitations (however transmitted) will also include its address or other contact information.

2. 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 St Peter's School;
- A copy of these guidelines.

3. Donors and prospective donors are entitled to know, upon request, whether an individual soliciting funds on behalf of the School is a volunteer, an employee, or a professional fundraiser.

4. Donors are encouraged to seek independent advice about the potential effect of a donation on the donor's financial position, tax liabilities, or relationship with other family members. The School cannot give advice on these matters.

5. The privacy of donors and prospective donors, and requests to remain anonymous, will be respected. The School will respect the confidential nature of donor records that it maintains, and they will be held and processed in line with the Data Protection Act. Donors have the right to see their own donor record, and to challenge its accuracy.

6. Donors and prospective donors will be treated with respect. Every effort will be made to honour their requests to:

- Limit the frequency of solicitations;
- Specify the manner in which they wish to be contacted, and particularly any means by which they do not wish to receive fundraising communications;
- Receive information or material concerning the School.

7. The School will respond promptly to a complaint by a donor or prospective donor about any matter that relates to the School's fundraising activities. A designated member of the Development staff, or volunteer, will attempt to satisfy the complainant's concerns in the first instance, and will ensure the Development and Alumni Manager is made aware of the complaint. A complainant who remains dissatisfied will be informed that s/he may appeal in writing to the Head Master and will be advised of the outcome of the appeal.

8. Donors accept that the management and governance of programmes and/or activities funded through philanthropy rests solely with the School. Donors will, however, be provided with appropriate and commensurate opportunities for continuing engagement with the programmes/activities that they have funded/are funding. The scope for this engagement will, in the case of significant gifts, be enshrined within a Statement of Intent (Value of £1,000+).

9. Donors and prospective donors have the right to refuse or withdraw consent to be contacted for fundraising purposes at any time.

### **Ethical Guidelines for the Acceptance of Gifts and Donations**

1. It is agreed that the basis on which St Peter's School will actively seek funding is:
  - That the full cost of the project has been estimated;
  - That the project is approved by the Board of Governors and Senior Leadership Team as being strategically important in significantly enhancing the pupil experience, or widening access to the School;
  - That the School has assessed any additional costs, such as increased running costs, later arising as a result of any programme or activity funded through philanthropy, and is confident that these costs can be met by the School on an ongoing basis without detriment to the pupil experience or the quality of education offered by the School.
  
2. The School will fulfil its legal obligation to exercise due diligence when accepting major donations (particularly for gifts greater than £10,000). Gifts greater than £3,000 in value cannot be accepted in cash, and should be made electronically, by cheque, or by credit or debit card.
  - Decisions that do not fall within the due diligence process will be taken by the canvasser concerned, and in the case of a decision to decline the donor, the Development and Alumni Manager, Head Master and Board of Governors will be informed.
  - Where the due diligence process has been undertaken and no issues have been identified the Development and Alumni Manager will take the decision to accept and s/he will advise the Head Master and Board of Governors accordingly.
  - If any doubt exists then the Head Master will be consulted and s/he may then refer the decision to the Board of Governors for final decision. The donor will be informed.
  
3. The School may refuse a donation if the gift, or the associated terms, would:
  - Be counter to the objectives or strategic aims of the School;
  - Require action that is illegal;
  - Seriously damage the reputation of the School;
  - Create unacceptable conflicts of interest;
  - Harm the School's relationship with other benefactors, current or prospective pupils and their families, or any other organisation or individual where such harm could be significantly detrimental to the School's ability to achieve its aims.
  
4. Previous decisions regarding the acceptance of particular gifts of more than £100k, taken in good faith, may be reconsidered in the light of new events or information.
  
5. The School will review gifts from pupils and parents (both current and prospective) to ensure that they do not have any inappropriate influence on the School's decision making processes.

### **Our commitment to our donors**

1. All communications made to potential donors concerning a project will be honest, truthful, and comply with the law. They will:
  - Accurately describe the School's activities and the intended use of donated funds;
  - Respect the dignity and privacy of those who benefit from the School's activities. Permission will be obtained before any individual is featured or identified in any promotional material.
  
2. The Donor's Rights (both under this Charter and under the law generally) will be respected.

3. Volunteers, employees and professional fundraisers who solicit or receive funds on behalf of the School shall:
  - Adhere to the provisions of this code;
  - Act with fairness, integrity, and in accordance with all applicable laws;
  - Adhere to the provisions of applicable professional codes of ethics, standards of practice, etc.
  - Cease solicitation of a prospective donor who identifies solicitation as harassment or undue pressure, and notify the Development and Alumni Manager.
  
4. Paid fundraisers, whether staff or consultants, will be compensated by a salary, retainer or fee, and will not be paid finders' fees, commissions or other payments based on either the number of gifts received or the value of funds raised.
  
5. The School will not sell either its donor or alumni lists. Lists may be made available to professional fundraisers contracted by the School solely for the purpose of fundraising activities on behalf of the School.
  
6. The Board of Governors will be informed at least annually of the number, type and disposition of complaints received from donors or prospective donors about matters that are addressed in this code.
  
7. All donations will be used to support the objectives of the School.
  
8. The School will usually, when seeking donations for a particular project, explain what will happen to funds that are raised if it subsequently becomes impossible for the project to proceed, or if more funds are received than are actually required. In most cases, the School will have discretion to decide how such funds are to be applied but, where appropriate and practicable, the School will consult donors before making that decision. If a donation is received on terms that impose a strict requirement for it to be used for a particular purpose within the School's charitable objects, that requirement will be respected. The School may only change the purpose for which such gifts are used in limited circumstances set out in the Charities Act.
  
9. The financial affairs of St Peter's School will be conducted in a responsible manner, consistent with the ethical obligations of stewardship and the legal requirements of national regulators.
  
10. Annual financial reports will be factual and accurate in all material respects and will be prepared in accordance with generally accepted accounting principles and standards.
  
11. The cost effectiveness of the School's fundraising programme will be reviewed regularly by the Board of Governors.

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Registered Charity Number: 1141329

Please direct any questions regarding this charter, or any aspect of the School's fundraising activity, to the Development and Alumni Manager.

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