

AGE UK EXETER

Controlled Document

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Owner (Responsibility): Chief Executive Officer

Pass amendments to: Governance Officer

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Document Location: www.ageuk.org.uk/exeter/about-us/policiesandguidelines/

Document Description

The Fundraising Policy sets out the responsibilities, purposes and practices surrounding the fundraising activities of Age UK Exeter (AUKE).

Implementation and Quality Assurance

Implementation is immediate and this policy shall stay in force until any alterations are formally agreed.

The policy will be reviewed every three years by the Board of Trustees, sooner if legislation, best practice, or other circumstances indicate this is necessary.

All aspects of this policy shall be open to review at any time. If you have any comments or suggestions on the content of this policy, please contact the CEO on, info@ageukexeter.org.uk or at Age UK Exeter, Sycamores, Mount Pleasant Road Exeter, EX4 7AE, 01392 202092.

Fundraising Policy

Introduction

With overall responsibility and accountability for the charity's fundraising, the trustees have a role to play in ensuring that their organisation fundraises legally, responsibly, and effectively, always treating the public fairly and with respect.

The purpose of fundraising

AUKE fundraises locally to increase income for the charity to enable it to deliver key services for older people in Exeter.

Fundraising is also a means of promoting the charity and raising the profile of the needs of older people in the community.

Our conduct in fundraising must be legal, open, honest, and respectful. This policy may be read in conjunction with our Ethical Policy, Financial Management Policy, Confidentiality Policy, Data Protection Policy, Offers of Gifts and Legacies Policy and Social-Media Policy if appropriate. Fundraising activities are to be in keeping with the purpose, values, and culture of the charity.

We fundraise in various ways, including through:

- Donations (including legacies and gifts)
- Events organised by our Community Events, Fundraising & Social Media Officer supported by Age UK Exeter volunteers
- Events organised by staff, volunteers, individuals and businesses that are facilitated by our Community Events, Fundraising and Social Media Officer.
- Sponsorship or 'Charity of the Year' through business partnerships and networking.
- The sale of goods, craft items, and donated items for auction.
- Charged for services that support the charitable arm of the charity.

Legal compliance

AUKE ensures that it complies with the fundraising sector guidelines and Code of Fundraising Practice, General Data Protection Regulations and as an Age UK National Brand Partner. We agree to abide by their fundraising charter, guidelines, and restrictions. We are registered with the Fundraising Regulator.

General Principles applied to our Fundraising Activities

1. Be generally responsible for explaining to the public how fundraising is organised and help educate the public about the realities of resourcing charitable organisations and the aspirations of AUKE. Where specific questions are received these should be answered openly and honestly.
2. Not to engage in fundraising which is an unreasonable intrusion on a person's privacy; is unreasonably persistent; or places undue pressure on a person to donate.

3. Fundraisers must take all reasonable steps to treat a donor fairly, enabling them to make an informed decision about any donation. This must include taking into account the needs of any potential donor to make an informed decision.
4. Where donations are raised through electronic means, such as through our website or social media channels, the level of security must be of a sufficient standard to protect the confidentiality of donor's credit card and other personal details.
5. Ensure that appropriate training, education, and information is available to fundraisers to enable them to perform their roles effectively.
6. To be fair and transparent in our processes and funding appeals.
7. To never denigrate other charities or agencies in our fundraising efforts.

Community Events, Fundraising and Social Media Officer

The trustees have encouraged the appointment of a dedicated member of staff to manage and lead the charity's fundraising efforts. The Community Events, Fundraising and Social Media Officer reports directly to the CEO and gives regular updates to the Board of Trustees.

Staff and Volunteers

Staff and volunteers are encouraged to participate in fundraising activities where possible, whether it be by organising events, volunteering time, ideas, or participation.

If individual fundraisers fundraise on our behalf, they need to adhere to our code of conduct, vision, and values.

Communication and Data Protection

Individuals, clients, and supporters can express whether they consent to receiving information about fundraising and events on AUKE's General Data Consent Form. This information will be stored securely inhouse. Donors' information will be kept for a period of 6 years from receipt of their last donation, in line with our Data Retention Schedule.

We will never contact individuals who have not given their consent to being contacted about AUKE fundraising, events, or marketing. Supporters can also opt out of future fundraising mailings and have 'the right to be forgotten' which they can action at any time. A copy of our Privacy Notice can be found on our website or on request.

Any envelopes, forms or devices used to collect donations at an event or similar will be checked in-house for GDPR compliance.

Photography

We have determined two different types of use for images that may be taken of our staff, volunteers, and clients/participants. Below is a brief process to be followed depending on which type of use we intend for the images.

Social media one time use only:

Typically, this might be an event or special occasion, something to capture the moment to share in a timely manner to our social media pages.

- 1) If possible and time allows, pre warn attendees at the previous session that we are likely to be taking photos the following week and it's not a problem to not want to be part of the photo but to make oneself known to the project lead.
- 2) Staff/volunteers should make it clear before they take the photo with a verbal announcement to advise, "we are taking photos today which we will be posting on our social media sites. If you wish to not be included, please make yourself known to (On the day lead)
- 3) It's good practice to also explain why we are taking the photos; this helps support everyone to understand the benefits to us and how we use social media to generate interest and appeal for volunteers and others.
- 4) Staff/volunteers should take the photo and send to the Community Events, Fundraising and Social Media Officer with the title of the photo being "date/session name /verbal consent issued by (your initials)" e.g. If Joe Bloggs took the photo at the Coronation Party on the 12th April it would read, 12/4/23 Coronation Party Verbal consent JB.
- 5) Staff/volunteers should delete the photo from their device once it has been sent.

Promotional Use Image:

Typically, this will be a predetermined staged shot designed to be used on promotional material, leaflets, flyers etc and widely distributed across the community for a larger period of time. This will always require a photography consent form to be completed. Photography consent lasts for two years.

Grants and Trusts

AUKE employs an External Grants and Trusts Fundraiser on a day-rate, usually employing his services one day a month. His/her job is to research potential funding opportunities and to lead on writing and submitting bid applications with the help of the Senior Management Team and Community Events, Fundraising and Social Media Officer.

AUKE will seek grants for the work it does in the city from a range of charitable trusts and statutory organisations. All such applications shall take account of our Ethical Policy and adhere to Institute of Fundraising guidance.

Receipt of Donations, Legacies & Sponsorship Procedure

1. Send all cheques & cash to the Community Events, Fundraising and Social Media Officer, then forward them to the finance department for accounting and depositing.

2. Update donor information in the database if the information on the cheque and/or response form is different. Note the date of change in the record.
3. Record gifts according to the donor's intended use, i.e. unrestricted, restricted (specific service or project), endowment, etc.
4. Record in the system the source of the gift, i.e. direct-mail appeal, social media appeal, special event etc.
5. Acknowledge all gifts within one week (if donor has asked to be acknowledged) using appropriate thankyou letters or phone calls based on the gift level.
6. The charity will take advantage of gift-aid where possible, in line with government recommendations.

NB: Sponsorship requires sign-off by the CEO as sponsorship is a contractual agreement.

Gifts-in-Kind Policy

AUKE accepts gifts-in-kind that support its mission, are consistent with its policies and are properly accounted for and acknowledged.

A gift-in-kind is an item such as equipment, software, or a product that a donor voluntarily transfers to the charity without charge or consideration.

The appropriateness of a 'gift-in-kind' will be considered by the Community Events, Fundraising & Social Media Officer and CEO. Large offers may be taken to the Board of Trustees.

Once accepted, the donated item(s) become the property of AUKE, which retains the right to dispose of a gift-in-kind as it sees fit, unless another arrangement has been made with the donor.

Principles for Corporate Sponsorship or Donations

The charity believes that it can best fulfil its mission through a broad base of support from various sources. However, to maintain its independence and objectivity, it seeks to identify any areas where there may be conflicts of interest or where the mission, projects and independence of AUKE could be compromised.

As part of expanding its base of support, we are willing to consider partnerships with and gifts from the business sector. We recognise that businesses, as profit-centred organisations, have obligations to their shareholders, Boards, and employees to be successful. Also, we recognise that companies' support to the non-profit sector is not only out of a desire to be helpful, but also with a hope of a return or benefit to the companies. Given these realities and legal and ethical considerations, AUKE will seek to develop recognition opportunities that are appropriate and meaningful for both the supporting companies and AUKE.

Complaints Procedure

Complaints relating to fundraising activity will be dealt with through AUKE's Complaints Policy. The number of escalated complaints will be monitored annually.

Revision History

Revision date	Summary of Changes	Other Comments
20.02.18	New Policy considered at the Fundraising Committee	Passed to Standards Committee
05.03.18	Reviewed by Standards Committee	Recommended to Board for approval.
13.03.18	Approved by the Board of Trustees	Next review due March 2020
May 2023	Update with new Community Events, Fundraising and Social Media Officer.	Next review due August 2026