

Fundraising Policy

Approved by Board of Trustees on: 06 September 2018
 Review Schedule: Every 2 years
 Next review due: 06 September 2020
 Owner (Responsibility): CEO

Document Description:

This policy outlines the principles of Age UK Wiltshire’s fundraising activities

Implementation & Quality Assurance

Implementation is immediate, and this Policy shall stay in force until any alterations are formally agreed. The Policy will be reviewed every two 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.

Revision History

Revision date	Summary of Changes	Other Comments

1. Fundraising policy statement

- 1.1. This policy is designed to clearly articulate the approach and principles Age UK Wiltshire will adhere to when undertaking all fundraising activities
- 1.2. The Director of Business Development and Fundraising is responsible for ensuring that all staff and volunteers undertaking fundraising activities are familiar with this policy and compliant with their endeavours
- 1.3. This document and the Age UK Wiltshire fundraising pack (guidance for public supporters/fundraisers) should be used as key reference documents by all staff and volunteers directly undertaking or connected to fundraising activities.

2. Legislation, Associated Policies & Guidance

- 2.1. This policy has been developed in line with the requirements of:
 - Fundraising Regulator and Information Commissioner's Office (ICO)
 - General Data Protection Regulation (from May 2018) and the Privacy and Electronic Communications Regulation (PECR).
 - Charity Commission guidance is also followed, especially regarding the responsibilities of trustees in relation to fundraising.
 - Age UK accounting procedures reflect the requirements of the Statement of Recommended Practice – Accounting and Reporting by Charities (Charities SORP)
- 2.2. This policy should be read in conjunction with the:
 - Data Protection Policy
 - Age UK Wiltshire Fundraising Pack (Guidance for our public supporters)
- 2.3. This Policy will be drawn to the attention of all staff and volunteers connected with or undertaking fundraising activities. A statement will be issued regularly reminding all staff and volunteers about the requirement to comply with policy, its principles and the Management team's commitment to it.

3. Scope

- 3.1. In scope - This policy sets out the principles by which Age UK Wiltshire will undertake fundraising activities, this includes; individual giving, community fundraising, legacy donations, sponsored events, corporate support and major donor / philanthropic activities.
- 3.2. Out of scope - This policy does not prescribe the specific means, mechanisms and processes by which fundraising activity will be undertaken. This will be through agreed actions devised by the internal fundraising function. This policy does not include all income generating activity, for example, competitive tendering for contracts or grant application processes are excluded.

4. Principles – Age UK Fundraising Charter

- 4.1. Charter and can be found prominently on the Donate pages of the Age UK / Age UK Wiltshire websites. At Age UK Wiltshire, we have developed our fundraising activity in line with our National partner Age UK, with our donors and older people in mind. Anyone who is kind enough to consider supporting us can be reassured that:
- We do not undertake any fundraising door-to-door activity
 - Due to the nature of our charitable work and objectives, in particular our safeguarding policies and work around protecting older people in their homes, we do not send our fundraisers to knock on people's doors to ask for donations.
 - We do not ask for direct debit donations on the street
 - We will not approach you on the street and ask for your bank details
 - We do not share personal data beyond the Age UK Network
 - We will never pass on your personal data to other organisations or charities for marketing purposes and will only contact you about products and services provided and/or offered by the Age UK Network.
 - We do not sell personal data
 - We will never sell your personal data to other organisations or charities
 - We do not 'cold-call' people for fundraising purposes. We only phone people with whom we have an existing relationship or who have already given us permission to contact them
 - 'Cold calling' involves a company or business calling someone with whom they have had no prior contact. We only call people who have supported us in the past or told us they would like to hear from us.
 - We will always check first that you're happy to speak to us when we phone. And if you don't want to be phoned, just let us know.

5. Roles and Responsibilities

5.1. Trustees

5.1.1. Age UK Trustees have six key responsibilities regarding fundraising activity:

- Ensuring that fundraising activity is planned effectively
- Ensuring that fundraisers, including volunteers, are properly supervised
- Protecting the reputation of Age UK, its money and other assets
- Identifying and following the recognised standards that apply to Age UK fundraising
- Being open and accountable to donors
- Ensuring compliance with fundraising law

5.2. Director

- 5.2.1. The Director of Fundraising is responsible for ensuring that all fundraising staff and volunteers are aware of the Age UK fundraising policies and implement all relevant and appropriate practices when undertaking their activities. Individuals are

responsible for ensuring that their fundraising activities reflect all legislative and recommended practice requirements.