

## DONOR CHARTER AND ETHICAL GUIDELINES FOR FUNDRAISING

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

### The Rights of our Donors

1. Whenever we communicate about fundraising, we will identify ourselves clearly as the Stamford Endowed Schools and we will always tell you why we are raising money, and how it will make a difference. All our printed and electronic communications will include our address and contact information, and we will make it as easy as possible for you to contact us.
2. We will make important information about the Schools, including our annual accounts, confirmation of our charitable status, and a copy of this charter, available on our website and will send copies of that information to you directly when you ask for it.
3. We will let you know at any time whether anyone who is fundraising on behalf of the Schools is a volunteer, an employee, or a professional fundraiser.
4. We will always respect your privacy, including any wish to remain anonymous. We will also respect the confidential nature of any information that we hold about you and will follow the regulations specified in the Data Protection Act. Let us know, at any stage, if you wish to see the information we hold on your behalf. You have every right to correct any inaccuracies in the data we hold about you.
5. We will always treat you with respect and ensure we manage carefully how often we ask for donations. We will only contact you by the means of communication that you have told us you are happy with.
6. If you have any questions or concerns about our fundraising activities, we will respond to them as quickly as possible, and we will keep our Director of Development and External Communications informed. If you are unhappy with our response, your concerns can be referred to our Principal and we will let you know the outcome.

7. We will publish details of the projects that we are raising money for, and we will let you know how your donation is being used. You can tell us how you would like us to use your donation, but if you wish to support a project that we are not actively raising funds for, please contact us first so that we can work with you to ensure that your donation has the greatest possible benefit for students.
8. You can opt out of fundraising communications at any point. To opt out, you can contact us at [foundation@ses.lincs.sch.uk](mailto:foundation@ses.lincs.sch.uk), or telephone us on 01780 750 032.
9. We will make sure to communicate with you honestly and truthfully, always in line with the law. We will always accurately describe our fundraising activities and how we intend to use the funds generated by the activity and we will respect the dignity and respect of any beneficiaries and make sure to ask permission before we identify or feature anyone within any of our published material.
10. We will remain respectful of your rights under both this Charter and within the law generally.
11. We will ensure that any volunteers, employees and professional fundraisers who raise money on our behalf shall:
  - a. work in line with this code;
  - b. act with fairness, integrity, and in line with the law;
  - c. work within the parameters of applicable professional codes of ethics, standards of practice, etc;
  - d. stop fundraising with an individual when they have asked us to and make the Director of Development and External Relations aware of the situation.
12. We will pay fundraisers a salary, retainer or a fee and will not pay finders' fees, commission or any other payment that relates to the volume or scale of donations.
13. We will hold all our data confidentially and will only make it available when we employ professional fundraisers to work on our behalf.
14. We will keep our Board of Governors fully informed of any complaints we receive regarding our fundraising activity.
15. We will commit to using all funds raised to support our objectives.
16. When we are fundraising for a particular project, we will let you know what will happen to your donations should the project not go ahead for any reason or should

we raise more money than is required for the project. We will use our discretion as to how to spend funds though, when possible, we will ask your opinion. If you have a very specific requirement as to where your donation should be spent, we will of course respect that and will only change how we use your gift in the limited circumstances outlined in the Charities Act.

17. We will always be responsible in how we manage our finances and will act in an ethical manner, while also meeting any legal requirements of national regulators such as the Fundraising Regulator.
18. We will make sure our financial reporting is accurate and will commit to preparing it in accordance with the relevant accounting principles and standards.
19. Our Board of Governors will review our fundraising activity regularly and consistently look at how effective we are being in our efforts.

## Guidelines for the Acceptance of Gifts and Donations

1. We will actively start fundraising for a specific project once these points have been taken into consideration:
  - a. the overall cost has been estimated;
  - b. the Board of Governors and Senior Leadership Team have identified the project as being strategically important in significantly enhancing our pupils' experience, or in making our Schools more accessible;
  - c. that any additional costs, such as increased running costs, can be sustained by us on an ongoing basis without causing any negative impact on our pupils or on the quality of the education we offer.
2. We have a legal obligation to exercise due diligence when accepting major donations (particularly for gifts greater than £10,000). We cannot accept gifts greater than £3,000 in value in cash: donations at this level should be made electronically, by cheque, or by credit or debit card. Regardless of the size of any gift, if it is ever necessary to decline a donation, the Director of Development and External Relations, Principal and Board of Governors will be informed, and we will inform the donor as soon as possible.
3. We might refuse a donation for the following reasons:

- a. it is not aligned with our objectives or strategic aims, and we are not in a position to ensure the full benefit of your donation can be achieved;
  - b. it requires illegal action;
  - c. it could seriously damage our reputation;
  - d. it will create unacceptable conflicts of interest;
  - e. it will harm our relationship with our other stakeholders, or any other organisation or individual where our ability to achieve our aims could be harmed.
4. If new information comes to light after a donation has been made, that would have prevented us from accepting it, we will reconsider our previous decision.
5. We will make sure that any donations from pupils and parents do not have an inappropriate impact on our decision-making processes.
6. We do encourage you to seek independent advice about the potential effect of any donation on your financial position, any tax liabilities and your relationship with any family members as we are unable to give advice on these matters.

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Registered Charity Number: 1109995

Please direct any questions regarding this charter, or any aspect of our fundraising activity, to the Director of Development and External Relations.

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