

G3 Fundraising and Development Policy

Background

The importance of fundraising, and the need for a coherent and co-ordinated fundraising strategy/approach, has become apparent in recent years following the introduction of a professional Development function at Purcell School, the growth of professional and government bodies, and the legal implications of recent Charity Law.

As a charitable organisation, we are subject to Charities Law, and the Governors are required to ensure that the school meets its charitable aims and that fundraising meets regulatory standards. The Fundraising Regulatory Board (FRB) was established by the government following the 2016 Charities Act to promote ethical practice in fundraising and to grow public trust and confidence within stakeholder communities. As we are subject to Charity Commission directives, we must adhere to the professional Fundraising Code. <http://www.fundraisingregulator.org.uk>

We are required by the Fundraising Regulator to demonstrate that we have a fundraising policy in place and that we have a defined complaints procedure. In addition, we have a commitment to the highest standards of good practice and to ensure that all fundraising activities are open, legal and fair. At the heart of this is honesty, accountability and transparency. As well as compliance, Governors must ensure by Law that fundraising is in line with the charity's values and mission. It is also important to focus all our fundraising activities towards specific charitable projects that benefit the greater good.

This Fundraising document works alongside the internal document 'Staff Code of Conduct', in particular to supporting colleagues in work, whilst promoting value and aims of The Purcell School.

Definitions

'Fundraising' is the over-arching term which is applied to any event, project or publication which seeks to raise money (excluding school fees and similar charges), and where the donors receive no direct benefit in return. It includes any and all such activities, which are carried out in the name of The Purcell School for our charitable purpose. In an education setting the term 'Fundraising' is interchangeable with 'Development' and evident in this document.

A 'donation' is a single, recurrent or collective gift for a specific activity, an event or project, where the donor receives no direct benefit in return.

'Advertising and Sponsorship' are specific types of fundraising activity which involves a business relationship where the advertiser/sponsor receives publicity in return for funds and association with our brand e.g. selling advertising space or providing sponsorship deals. These are to be covered in a separate policy.

Policy

1. Fundraising priorities for The Purcell School are set by the Principal, Bursar, Director of Development and the Governing Body.
2. All school fundraising activities require the permission of the Principal in advance. This should be in consultation with the Development Team in the first instance.
3. All fundraising at The Purcell School must comply with the Code of Conduct laid down by the Fundraising Regulator. An audit can be carried out at anytime. The Code of Conduct is found at <https://www.fundraisingregulator.org.uk/code/all-fundraising>
4. Fundraising in the name of The Purcell School MUST only be for one of the following purposes:
 - To enable students whose parents cannot afford the full fee, and who may not receive a full Government Music and Dance scheme place, to access, via the bursary fund, an education provided by the School;
 - To provide opportunities, events or activities to benefit the school community as a whole;
 - To generate capital income in areas such as new buildings, development of the existing school site or provision of instruments or other equipment;
 - For any other purpose which furthers the charitable objectives of The Purcell School;
 - For external, registered charities (i.e. a cause chosen by students such as a local charity) in agreement with the Development Department
5. **Strategic Plan.** All future fundraising must be in line with the school's aims, ethos and the school's strategic plan as outlined by the Principal.
6. **Benefactors.** As well as being an educational establishment, The Purcell School is also a registered charity (Number 312855) and has specific fundraising targets. The Purcell School also has to ensure its charitable aims are upheld in order to maintain its status as a registered charity with the Charity Commission. The future of the school and its survival is dependent on raising funds for bursaries. Although the Government's Music and Dance Scheme provides funding for some of the School's students, financial support is required for many other students. Part of the Development Department's role is to secure bursaries for these students and to raise funds for other school projects, as priorities dictate from the Governing body, Principal and Bursar.
7. **Approaching and Cultivating Existing Benefactors.** All Purcell School staff and parents of Purcell School students are asked to assist with the development of this work by:
 - I. Being ambassadors for The Purcell School and recommending The Purcell School for support to their friends, colleagues and business contacts
 - II. Parents & students - Not making requests directly to the School's benefactors (including Alumni, Trusts, Major Donors or Corporate Partners) for financial assistance for their children or themselves either whilst the student is at school or when they move on to undergraduate studies.
 - III. Purcell School Staff-Not making requests directly to the School's benefactors

(including Alumni, Trusts, Major Donors or Corporate Partners) for financial assistance without the prior consent of the Principal via the Director for Development.

The Development Team is responsible for making approaches to funding sources (such as Trusts, Foundations, organisations or individuals) on behalf of the School and can advise on sources of financial support should this be necessary.

8. **Approaching and Cultivating Potential Benefactors.** If a staff member identifies a fundraising opportunity with a new or potential benefactor, the Director of Development and Principal should be informed. Any cultivation plan for with a potential benefactor should be led by the Director of Development or the Principal, in close collaboration with the referring contact. Maintaining appropriate long-term relationships with potential benefactors is vital to growing development income. Effective training, handovers and internal communications should also be implemented for all those involved in this process.
9. **Maintaining Accurate and Timely Records on the Database.** Records are to be made of ALL charitable donations to The Purcell School, irrespective of whether income has been restricted to a certain project. Each donation is then coded, particularly if the money is to be allocated for a certain appeal or project. Each donation is recorded on Raiser's Edge (the school's fundraising database) to ensure that:
 - the terms of donation are complied with
 - we acknowledge and thank the benefactor appropriately, in accordance with our Donor Recognition Policy
 - we can accurately forecast budget against targets
 - we have an accurate picture of all charitable income for The Purcell School
10. **GDPR.** The Purcell School has a central database, Raisers' Edge, which holds all relevant information regarding donors and potential benefactors. All data regarding donors should only be stored here and not in personal files, folders or with members of staff. Data protection is an important issue for all involved at the school. The Purcell School has a legal obligation to adhere to GDPR. The school's Data Protection Policy and Fundraising & Development Privacy Notice contains the specific details outlining how the data of donors is used and also GDPR's Lawfulness, Fairness and Transparency Data Protection principle.
11. **Raffles and Lotteries.** Organisers should note that lotteries/raffles are subject to the Gambling Act 2005 and may require a licence or for the school to register with the local authority. The Director of Development must therefore be consulted before any lottery is undertaken, as a licence may have to be obtained.
12. **Donations.** Any financial support offered by a donor to The Purcell School will be treated as a 'charitable gift' (with gift aid where applicable). Donors may add a 'restriction' to the purpose of their gift (e.g. for a Bursary), but the donation must not have any propitious benefit for the donor and must be made via the Principal, Bursar or Development Office (who will undertake the necessary due diligence). The funds will then be used only for the activity or project for which they have been given as a charity, The Purcell School reserves the right to refuse any gifts if it feels that the use of such funds is too restrictive, is unethical or that it fails the due diligence test. Please refer to the Purcell School's Ethical

Fundraising & Gift Acceptance Policy for further details.

13. **Cash/Loose Change Collections.** Fundraising organisations carrying out any public cash collection must comply with the relevant licensing/permission procedures. In England and Wales, a licence to collect must be obtained from the relevant authority in the area, such as the local authority or the Metropolitan Police if the collection is taking place in a public area. A staff member (with assistance of the Development Team) should apply for licences in good time before the collection is due to take place.
- Any cash collections held on behalf of The Purcell School must be counted by a Purcell staff member and if a Purcell School student manages the collection. The Development team should be notified in advance of any collection taking place.
 - Two Purcell School staff must be present when monies are being counted and bagged. A cash collection form should be completed and signed off by both staff members. The amount will then passed to the Finance Manager for checking, banking and recording within 2 working days of the collection taking place. Gift Aid can be obtained on annual collections of up to £5000 (Gift Aid Small Donations Scheme).
 - Purcell School staff or any commercial participators **must not** make any deduction from any cash collection or an intended or received donation for The Purcell School
14. **Website Donations and Fund Allocations.** A generic ‘Donate Now’ function is set up on The Purcell School website, meaning money will be received into the school via the Finance department. Details will be sent to the Development Team for donor acknowledgment and be recorded on the database. If the donor does not indicate a specific fund, the Bursar will allocate the income based on funding priorities.
15. **Banking Donations.** No member of staff, student or the public should open up a bank account in the name of The Purcell School. Any monies raised on behalf of, or for The Purcell School will be paid into the main Purcell School bank account.

<i>Policy Author</i>	<i>Policy Date/Review Date</i>	<i>Next Review Date</i>
R Blake	January 2020	January 2021
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