

G9 Ethical Fundraising & Gift Acceptance Policy

The Principal and Governing Body of The Purcell School welcome offers of donations of all amounts, which enable the school to continue its long term development. The Purcell School is a registered charity, number 312855.

Donations must be freely given with no expectation of anything in return other than due thanks and recognition. The Governing Body is pleased to accept lawful donations which are given in good faith and are compatible with the schools aims, ethos, values and strategic objectives. The Governing Body will not accept donations when a condition of acceptance would compromise the school's integrity, autonomy or reputation.

This policy aims to outline the principles by which The Purcell School Development Office will or will not pursue potential donations, and to establish guidelines governing potentially controversial gifts or benefactors.

Its purpose is to give prospective benefactors the greatest freedom possible in formulating and giving their gifts, whilst safeguarding the best interests of The Purcell School.

Principles of Ethical Fundraising

1. Fundraising solicitations on behalf of The Purcell School will:
 - a. Be truthful;
 - b. Accurately describe the intended use of donations; and
 - c. Be made in accordance with any applicable requirements under charity law and the Fundraising Regulators Code of Conduct and Practice.

2. Employees, patrons, ambassadors and volunteers who solicit funds on behalf of The Purcell School shall:
 - a. Adhere to the provisions of these guidelines. As well as those of The Purcell School Fundraising & Development Policy;
 - b. Act with fairness, integrity and in accordance with all applicable laws;
 - c. Adhere to the provisions of any applicable professional codes of practice which apply to them as individuals;
 - d. Cease solicitation of a prospective benefactor who identified solicitation as harassment or undue pressure;
 - e. Disclose immediately to the Principal and Governing Body any conflict of interest; and
 - f. Not accept donations for purposes that are not compliant with the school's strategic and educational aims.

3. Employed Fundraising staff, whether employed as Consultants or short term contractors at the time, will not be paid finders' fees, commissions or other payments based on the number of gifts received or the value of income raised. They will be paid by a salary, hourly wage or fee. Their compensation will be consistent with The Purcell School policies and

practices which apply to non-fundraising personnel.

4. Any benefactor records held by The Purcell School Development Office will be maintained in accordance with the school's data protection policy. The policy is found on the school website.
5. The Purcell School will not sell its donor lists, Alumni lists or any contact details.
6. The Governing Body will be informed of the number and nature of any complaints received by donors or prospective donors about any matters which are addressed in these guidelines.

Benefactor Recognition & Acknowledgement

The Purcell School is immensely grateful to all those who support its work and wishes to clearly demonstrate this with integrity and accountability.

The Governors, Trustees, Principal and staff undertake to treat all donations, gifts and bequests with the highest level of care and respect in support of the charitable aims of The Purcell School.

1. Formal acknowledgment of all donations will be sent to every donor upon acceptance of the gift.
2. Unless the benefactor wishes to remain anonymous, the benefactor's name will usually be listed in the annual review, on the school's website and in concert programmes. They may also appear in other printed and online publications and materials prepared by the school's development or marketing teams. The gift amount given will not be published, unless the donor has given written consent.
3. Where a benefactor wishes to remain anonymous, this anonymity will be respected for all public purposes. However The Purcell School will disclose details of any benefactor where required to do so by law, by any governmental or regulatory authority, or by order of a court. The identity of anonymous benefactors will be known only to the Principal, the Chair of Governors, and to those staff in the Development Team who are responsible for registering and processing the gift.
4. The majority of benefactors wish to be kept informed of the progress of the activity they have supported. The benefactor can expect to receive, as a minimum, an annual update providing feedback about the use of donations received. This may include student case studies.
5. In the situation of means-tested bursary funding, where the gift provision is equivalent to 100% of the annual education fee, as a minimum, the donor will receive a short written report on the bursary recipient(s) as part of the selection process, followed by a further progress report at the end of each academic year. The bursary recipient(s) details may be anonymised in reports.

NB The Purcell School has a separate Donor Recognition Policy which sets out our aims, for internal management purposes.

Gift Acceptance

The school encourages the solicitation and acceptance of gifts and grants that enable it to fulfil its strategic aims. Gifts may be sought from organisations, foundations, trusts and individuals. As The Purcell School is committed to the highest standards of integrity and to musical and academic excellence, the Governing Body will not accept gifts when a condition of such acceptance would compromise these fundamental principles.

The Purcell School is unable to accept any gift which is too restrictive in purpose or not in keeping with the stated academic aims, priorities and strategic objectives of the school.

Gifts which could expose The Purcell School to adverse publicity, or require expenditure beyond school resources, or involve the school in unexpected responsibilities because of their source, condition or purposes, will not be accepted.

Gifts received by The Purcell School must not inhibit it from accepting gifts from other benefactors. The Purcell School cannot accept gifts which involve unlawful discrimination on any basis. Gifts that may result in current or future financial obligations for the school, or that will have an impact on school facilities or activity will require prior approval from the Governing Body. Gifts involving naming a school activity or facility will also require Principal or Governing Body approval.

The Purcell School is legally obliged to adhere to the terms and conditions of every gift received. For this reason, the terms of each gift must be considered with the utmost care to be certain they are feasible, do not unduly hinder the usefulness and desirability of the gift and are in accordance with Purcell School policies.

Potential Gifts Which May Be Deemed Controversial

The following points are to be considered for all potential gifts and prospective benefactors that may suggest a controversial dimension:

1. Would accepting the gift be opposing the schools strategic and educational objectives?
2. Is there published or other credible evidence that the gift will arise from the outcome of an activity involving
 - i. Fraud or evaded taxation?
 - ii. Violated international conventions that impact human rights?
 - iii. Was illegal-in whole or in part?
 - iv. Is not in keeping with the reputation, ethos and values of The Purcell School?
3. Is there any evidence that the proposed gift or any terms attached to it will:
 - i. Require action that is illegal?
 - ii. Damage the school's reputation?
 - iii. Create unacceptable conflicts of interest?
 - iv. Harm the school's relationship with its stakeholders (e.g. benefactors, students, parents, community, patrons, staff and alumni?)

If the Development Manager considers that the answer to any of these questions may be a yes, it is their responsibility, at the earliest stage, to alert the Principal. With the Chair of Governors, the Principal will then decide whether or not further discussion is warranted with the potential benefactor.

The Chair of Governors at this stage may wish to convene an ad hoc Gift Acceptance meeting involving the Development Manager, Principal and at least two Governors. Prior to the meeting, the Development Manager will brief members on the due diligence carried out on the benefactor and the background to the gift. Professional research will be conducted to address any issue of reputational risk if there are any concerns about benefactor identity. Gifts will not be accepted where the sources are unknown to the Development Team or that cannot be verified.

Use of Different Gifts

Each Benefactor has the right to be informed of how The Purcell School intends to use their gift and to know that The Purcell School is committed to using all donations efficiently and effectively.

Unrestricted Donations

These are placed at the immediate disposal of The Purcell School. They may be expended on any purposes by the Governors.

Restricted Donations

These are placed at the immediate disposal of The Purcell School and must be used for purposes as defined by the benefactor, such as bursaries. They are accepted according to the terms outlined by this policy. Donation restrictions are accepted only when they do not add any unauthorised budgetary or administrative burden on The Purcell School.

Endowments

Unrestricted endowment gifts are encouraged. Gifts of endowments will be managed according to the investment and expenditure policy approved by the Governors.

Property

The Purcell School may accept a donation or legacy of unencumbered property or real estate. The Governing Body has a legal responsibility to act in the best interests of The Purcell School.

Benefactors should be aware that this may therefore involve selling any gifted estate or property and using the proceeds to advance the school's strategic and educational aims. With this in mind, benefactors considering such gifts are encouraged to liaise with the Development Team at an early stage.

Legacies

A Legacy is a gift of any amount bequeathed to The Purcell School in a donor's will. Legacies may be pecuniary, residuary or a specific bequest.

Benefactors have a right to know that any gift made for a particular purpose will be used for that purpose. Benefactors should be aware however that following an established legacy gift or endowment and over (sometimes many) years, the funding priorities and situation of The Purcell School may change in unforeseen ways.

The Governing Body and Principal must have the flexibility to make use of funds, consider the best interests of the school at all times, whilst also incorporating the benefactor's or estate's interests and wishes. Every effort will be made to consult the donor (or their representative) and their

wishes taken into account as to any change in fund specification. For the above reasons, benefactors are advised to clarify the specific purposes of their gifts as broadly as possible, avoiding restrictions or detailed limitations. Benefactors considering bequeathing gifts to The Purcell School are encouraged to contact the Development Team at an early stage.

Gifts of Tangible Personal Property

Gifts of jewellery, artworks, musical instruments, music collections and equipment may be accepted. Benefactors should be aware that the school has very limited space and is not able to use funds on any storage facilities of a specialist nature or use any offsite facilities without Governing Body approval. The school therefore reserves the right to sell any donated tangible personal property. Such items will not be sold for as long as the Governing Body deems the gift to have an educational purpose related to the ethos and strategic aims of the school.

The Purcell School will adhere to all HMRC guidelines in connection with disposing of donations of tangible personal property and filing of applicable tax reporting forms.

<i>Policy author/reviewer:</i>	<i>Policy date/review:</i>	<i>Next review due:</i>
Ruth Blake	January 2019	January 2020
Adam Wroblewski	November 2021	November 2022