Blackpool Music School

Fundraising & Grant seeking Policy

Feb 2024

# Introduction

* + 1. At Blackpool Music School, our fundraising promise to the general public and our existing supporters is that our fundraising, in all its forms, is legal, open, honest and respectful. We will be honest about how donations are used to fulfil our mission, open about the methods we use to seek grants and raise funds and who we work with, respectful to the wishes, preferences, personal information and circumstances of the people we interact with and we will take all steps necessary to comply with the law and sector fundraising practice standards.
       1. We will take responsibility for our actions, ensuring that our fundraising is carried out in line with the Code of Fundraising Practice.
       2. Nobody directly or indirectly employed by or volunteering for Blackpool Music School shall accept commissions or bonuses for fundraising activities on behalf of Blackpool Music School.
       3. No general solicitations shall be undertaken by telephone or door-to- door to the public.
       4. If our fundraisers, those employed by Blackpool Music School (if any) or contracted to fundraise on our behalf, identify signs of vulnerability, they will respond appropriately and according to the principles of being legal, open, honest and respectful.
       5. We will always be respectful. This means being mindful of and sensitive to any particular need that a donor may have. It also means striving to respect the wishes and preferences of the donor.
       6. We will treat donors fairly. We will not discriminate against any group or individual.
       7. We will respond appropriately to the individual needs of our donors. We will consider all requests to adapt our approach (tone, language, communication technique) to suit the needs and requirements of the donor.

# Legal requirements

* + 1. This policy and related procedures takes into account the following legal requirements and regulatory codes, standards and guidance:
* Charities (Protection and Social Investment) Act 2016
* Charities Act 2011
* Charities Act 1992
* Data Protection Act 2018
* General Data Protection Regulation (GDPR).
* Safeguarding Vulnerable Groups Act 2006
* Equality Act 2010
* Payment Card Industry Data Security Standards (PCI-DSS).
* Fundraising Regulator Code of Fundraising Practice
* Institute of Fundraising Treating People Fairly Guidance
* Gambling Act 2005
* Mental Capacity Act 2005
* Bribery Act 2010

# Fundraising compliance

* + 1. Blackpool Music School Trustees take ultimate responsibility for fundraising compliance. They delegate operational management of fundraising and seeking grants to the MANAGER.

# What are the fundraising activities covered by this policy?

* + 1. Charitable Funds consist of but are not exclusively limited to:
* Money left in a legacy for the benefit of Blackpool Music School (or a certain part of Blackpool Music School)
* Money which has been raised through fundraising events
* Money which has been donated as a result of a fundraising appeal
* Corporate sponsorship (if any)
* Grants solicited to carry out the charity’s work
* Charitable foundation funds
* Tangible personal property (gifts-in-kind)
* Property
* Shares or bonds
* Pledges (for example Fixed Crowdfunding)

# Staff responsibilities

* + 1. Charitable Funds are subject to a range of rules and guidance. The control and management of these Charitable Funds is the responsibility of the Board of Trustees of Blackpool Music School, who as the Trust Board of Blackpool Music School, delegate responsibility to the Manager
    2. Staff at Blackpool Music School are responsible for implementing this policy and adhering to the related procedures. They should make themselves familiar with this

policy as well as the Code of Fundraising Practice and the Institute of Fundraisings (IoF) Treating Donors Fairly guidance.

# Fundraising by staff

* + 1. Participation in fundraising activities (for the purposes of this policy, meaning specifically participating in or completing the activity) by staff is voluntary and should not be imposed on individuals. The existing charity insurance arrangement covers staff for certain ‘low risk’ fundraising activities, however approval must be sought from prior to the commencement of the activity. Any event not covered by this policy must obtain its own insurance cover and be approved by the Board.

# Vulnerable people

* + 1. When responding to a supporter or member of the public in vulnerable circumstances, staff must take all necessary steps to understand if the supporter is able to make an informed decision about donating to Blackpool Music School and respond appropriately. If a supporter is deemed unable to make an informed decision the member of staff must not accept the donation.
    2. Blackpool Music School will ensure two members of staff are present when receiving a donation from a vulnerable donor e.g. with illnesses or conditions which affect their judgement.

# Acceptable fundraising activities

* + 1. Before fundraising activity can be initiated approval must be sought from Blackpool Music School's Board of Trustees. Applications for grants must be for activities in line with the charity’s purposes and be ethical in nature
    2. All fundraising by means of lotteries, e.g. raffles, etc. must comply with the required licensing arrangements
    3. All fundraising publicity must state quite clearly how the fundraising will benefit Blackpool Music School and where further information of Blackpool Music School's fundraising policy can be located.
    4. It shall be the responsibility of the Manager to coordinate the soliciting of funds from individuals, foundations, businesses, corporations and organisations in order to avoid an excessive number of solicitations in the name of Blackpool Music School.

# Donations or gifts

* + 1. Blackpool Music School in deciding whether to accept or decline a donation or gift will consider the charity's best overall interest and will not accept donations from donors whose activities appear to be in direct conflict with our charitable aims and objectives.
    2. Additionally Blackpool Music School will not work with companies or individuals who participate in activities which:
* could cause detriment to the charity’s reputation
* will disproportionately decrease the amount of donations to further the work of the charity
* undermine our vision and values
* are associated with unsuitable products, corporate or individual e.g. arms dealings and tobacco
* are from individuals, groups or organisations which are known to take advantage of specific members of the community or the community generally.
* are personal gifts to Blackpool Music School staff members, which should be discouraged at all times and reported if received
* are from unknown sources of funding. Blackpool Music School will take reasonable steps to determine the ultimate source of funding for each gift and satisfy itself that the funds do not derive, directly or indirectly, from activity that was or is illegal
* potentially harm our relationships with other donors, service users, stakeholders or volunteers
* expose us to undue adverse publicity or reputational risk
* require unacceptable expenditure or additional charity resources
  + 1. If supporters wish to make a donation to a specific area of Blackpool Music School's work then they make a specified donation by providing written instruction to this effect with their donation. Blackpool Music School will always respect this. If Blackpool Music School is unable to accept the request for the specified donation and the sponsor does not want the donation used in any other way Blackpool Music School will refund the donation.
    2. Refusals of donations or gifts
* If a donation is received which may not be acceptable under the terms of this policy the Chair of the Board and the MANAGER will be notified at the earliest opportunity. This will be researched further and the matter will be referred to the Board with the necessary information regarding the donation.
* All anonymous donations of £25,000 or more will be reported to The Charity Commission as a serious incident (in line with current Charity Commission guidelines), and will follow the Blackpool Music School’s guidance on the handling of such donations.
  + 1. **Donation or Gift processing**
* All donations or gifts must be conveyed to the Board at the earliest possible opportunity accompanied by all original correspondence pertaining to the donation or gift, which will be filed by the Manager. A receipt of donation form should also be completed with the donor, including their full name and contact details, and address
* On receipt, all donations should be processed through the donation record management system, which is maintained by the Manager
* When donations or gifts are received, a completed receipt of donations form must accompany them. The finance team is responsible for allocating the donation to the appropriate fund as described on the form by the fundraising office
  + 1. A ‘Receipt of Donation’ sheet will be completed by the manager and the following information must be included on the sheet:
* The donor’s name and complete address must be provided. If the gift is from other than an individual i.e. corporation, organisation, charitable trust, etc. a contact name and job title should be reported in addition to that of the company
* Email address (where available) and telephone number of the donor
* Date of gift received
* Other special instructions i.e. is this a specified or unspecified donation
* Does the donor require notification of when the donation was spend or what it was spent on?
* Upon receipt of a unique donation (i.e. restricted (for a specific purpose) or unrestricted (for any charitable purpose) donation) and the appropriate supporting documents the Board will record the donation and send acknowledgement of receipt to the donor
* Is the donor happy for their donation to be acknowledged publicly e.g. on our website / in the annual report
  + 1. Gifts in memoriam - donations or gifts to honour, in remembrance or otherwise recognise individuals, whether the donor is living or by bequest, will be received by the Board. It will be the policy of the Blackpool Music School not only to receive such gifts but also encourage efforts to remember and honour donors
    2. Legacies
* The Board deals with all contacts regarding legacies. If managers are contacted by potential legators, they must refer the conversation to the Manager, and agree a relationship management plan
* The Board will notify the MANAGER of a potential legacy and seek legal advice should there be requirements around the Will/bequest
* When the legacy money is received, this will be processed by the Manager. They will deal with all administrative arrangements including correspondence with the solicitors or family to acknowledge receipt of the monies. They will also be responsible for confirming whether any publication of the bequest is appropriate
* All new legacies will be communicated to the Board of Trustees, both when notified and when received
* All legacies will be subject to the submission of an expenditure plan, prepared by the Manager for individual services to ensure that the terms of the bequest can be met within a reasonable time
* Blackpool Music School will encourage general legacies but will adhere to the strict wishes of the legator at all times
  + 1. Pledges (fixed crowdfunding) - sponsors may be allowed to make pledge commitments to be paid over a specific period of time or when it is appropriate for items to be bought upon receipt
    2. Solicitation of charitable trusts and corporates
       1. It shall be the responsibility of the Manager to co-ordinate the solicitation of charitable trusts and companies. This co-ordination will ensure that an excessive solicitation of any single source of funds is avoided

* + - 1. Blackpool Music School will not endorse products, treatments or companies. Sponsorship arrangements (for example of events) will be clearly publicised and conflicts of interest considered as part of event risk management
    1. Fundraising Collections
       1. Blackpool Music School will ensure that all fundraising collection is carried out sensitively to protect the organisation’s reputation in the mind of the public
       2. Blackpool Music School will ensure that adequate permission for a static collection is obtained, and can evidence this sufficiently where required; and that all collectors can be clearly identified
    2. Handling of Cash Donations - Blackpool Music School will adhere to the following good practice when handling cash donations resulting from face-to-face activities:
       1. Cash must be collected, counted and recorded by two unrelated individuals and counted in a secure environment, wherever possible. (Collection boxes must only be examined and opened by two unrelated individuals)
       2. Unsecured cash must never be left unattended or in an unattended environment
       3. Cash must be banked as soon as is practicable
       4. Cash not banked immediately must be placed in a safe or other secure location and the Board must be notified
       5. At the earliest possible date, reconciliation must be made between cash banked and income summaries. Where practical, this must be undertaken by a person independent of the counting and cashing up of the money

# Reports to sponsors

* + 1. It shall be the responsibility of the Board with the support of the Manager, to compile official reports on appeal donations/grants if requested by outside agencies or individual donors

# Donor recognition

* + 1. A donor to Blackpool Music School is entitled to appreciation for his/her donation. Each donation will be acknowledged by th Manager if under £100 and the Board if over £100
    2. Sponsor’ names may be published in the Blackpool Music School’s Annual Report, newsletter, website and/or social media. It will be at the Board’ss discretion to inform the sponsor should there be a cost implication to their recognition, e.g. cost of plaque, etc.

# Donor research

* + 1. Research on donors and prospects is an acceptable and intrinsic part of fundraising. Data surrounding individuals and companies who wish to be associated with Charitable Funds will be stored in a confidential file. It must be stressed that any approaches undertaken by Blackpool Music School will be handled in a sensitive and appropriate manner and comply with current data protection legislation. Donor and prospect research activity is limited to theBoard, with these members of staff fully briefed on the application of GDPR to this activity

# Database of donors

* + 1. The Manager shall be responsible for development, maintenance and compliance of a record of donors and prospects, working closely with the Board
    2. Blackpool Music School shall seek from staff, details of donors which may be used to solicit support
    3. Data held regarding potential donors will be destroyed when it becomes clear that they do not wish to be approached by Blackpool Music School in regards to fundraising, or 3 years after they have been identified as a prospect, whichever is sooner
    4. Blackpool Music School will respect the privacy and contact preferences of all donors and will respond promptly to requests to amend contact details, including the removal of contact details from the fundraising database

# Donation sharing with other organisations

From time to time, Blackpool Music School may receive a donation or funding which is intended for use by more than one charity. Where the funding has been solicited e.g. via a grant application or proposal, clear documentation regarding the proposal, how funds will be used, and how the charities will account individually and collectively for expenditure, must be in place prior to agreeing a final receipt of funds.

Blackpool Music School is committed to providing reporting around donation sharing within a reasonable framework.

# Complaints

* + 1. Blackpool Music School will respond to all complaints from sponsors and members of the public in a timely, respectful, open and honest way in line with Blackpool Music School's **Complaints Policy**.

Signed:

Chairperson

Blackpool Music School Date: ………………………