

## **Farleigh School Development Charter & Ethical Guidelines**

The Farleigh School Development office welcomes offers of donations of all sizes. Philanthropic gifts from individuals, trusts and foundations and corporate donors can play a vital and vibrant role in school life and such support can enable Farleigh to do more – to provide full bursaries, to fund more opportunities and to enhance facilities for pupils, staff and the wider Farleigh community.

Farleigh School seeks and accepts philanthropic gifts in accordance with CASE (Council for Advancement and Support of Education) guidelines and seeks to uphold the Codes of Fundraising Conduct.

### **The Mission of the Development office:**

The Farleigh School Development office is the fundraising vehicle for Farleigh School ('the school'), a charitable organisation registered with the UK Charity Commission (Charity Number 1157842: *Farleigh School Trustee*). It encourages the solicitation and acceptance of gifts for purposes that will help the School to further and fulfill its mission. The mission of the school is:

- To share with parents in the spiritual, moral and intellectual development of their children in a Catholic community, which welcomes all faiths.
- To provide a first class education striving for excellence in all academic, cultural and sporting pursuits, giving every child the confidence to discover where their gifts lie and to enjoy their talents.
- To educate children in the teaching and sacramental life of the Church and to encourage them towards a life of faith.
- To create a well-ordered and caring school community, where the self-respect and dignity of each person will flourish.
- To help Farleigh pupils to grow up honourably, inspired by high ideals, so that they may serve others generously, and be strong in friendship and family.

### **Purpose of this policy:**

On behalf of the charity led by the Governors, the Development office may solicit gifts from individuals, corporations, and charitable trusts and foundations, to help further the mission of the school. This policy governs the acceptance of gifts by the school and provides guidance to prospective donors and their advisers when contemplating and/or making gifts.

Donations must be freely given with no expectation of anything in return other than due thanks and recognition. Farleigh is pleased to accept lawful donations which are given in good faith and which are compatible with the school's aims, ethos and strategic objectives. As the school values and safeguards its autonomy, integrity and reputation, it does not accept donations when a condition of acceptance would compromise these fundamental principles. This policy is to be

interpreted so that prospective donors may enjoy the greatest freedom possible in formulating their gifts, whilst safeguarding the best interests of the school.

## **A. Fundraising Practices**

Development is responsible for:

- the cultivation and the stewardship of donors at all levels;
- the management and administration of all pledges, gifts and legacies;
- accounting and reporting for individual gifts in conjunction with Accounts and the Bursary;
- compliance with Charity Commission and UK law, including the Data Protection Act of 1998 regarding said contributions;
- ensuring to the best of their ability that all gifts are used according to donor guidelines.

The school encourages the solicitation and acceptance of private gifts and grants that enable it to fulfil its educational mission. Gifts may be sought from individuals, corporations, and foundations.

All pledges and / or gifts should be accompanied by a completed Gift Form or appropriate written documentation showing the donor's name and purpose of the gift for transparency and accurate record-keeping.

All solicitations and appeals for funds will:

- be truthful;
- accurately describe Farleigh's activities and the intended use of donated funds;
- respect the dignity of the donor and of those who benefit from the school's activities;
- act with fairness, integrity, and in accordance with all applicable laws;
- adhere to the provisions of applicable professional codes of ethics, standards of practice, etc.

Donors and prospective donors are entitled to know, upon request, whether an individual soliciting funds on behalf of the school is a volunteer, an employee or a hired solicitor: the Development office comprises one full-time paid member of staff. Paid fundraisers are compensated by a salary, and are not be paid finders' fees, commissions, or percentages of gifts raised based on either the number of gifts received or the value of funds raised.

Members of staff, both paid or volunteer (including Governors), embody in word and action respect for truth, fairness, freedom of expression, and the opinions of others. They uphold the professional reputation of the school and of other Development, alumni and education professionals and give credit for ideas, words, or images originated by others. They are obliged to:

- safeguard privacy rights and confidential information;
- not grant or accept favours for personal gain;

- avoid actual or apparent conflicts of interest and, if in doubt, seek guidance from appropriate authorities.

Donors will be encouraged to seek independent advice if the school has any reason to believe that a proposed gift might significantly affect the donor's financial position, taxable income, or relationship with other family members.

Farleigh School's financial affairs will be conducted in a responsible manner, consistent with the ethical obligations of stewardship and the legal requirements of the Charity Commission.

All financial reports will:

- be factual and accurate in all material respects;
- be prepared in accordance with generally accepted accounting principles and standards.

A formal acknowledgement of donations is sent to each donor upon receipt of a gift.

The Development office will:

- cease solicitation of a prospective donor who requests no further contact;
- disclose immediately to the school authorities any actual or apparent conflict of interest;
- not accept donations for purposes that are inconsistent with the school's ethos or aims.

Development will not share parent, pupil, prospect, donor or alumni lists outside of school nor sell or share for the purposes of external marketing, or for use by other charities or corporations.

All restricted or designated donations will be used for the purposes for which they are given, in a timely fashion. If necessary due to programme or organisational changes, alternative uses or extensions to timescales will be discussed where possible with the donor(s). If a donor is deceased, and school is unable to contact a legal designate, the donation will be used in a manner that is as consistent as possible with the donor's original intent.

The cost long-term cost-effectiveness of Farleigh's fundraising programme, undertaken by the Development office, will be subject to periodic review by Farleigh's Board of Governors.

Gifts are accepted in the following formats:

- *Cash or equivalent:* In order to comply with money laundering regulations, cash donations of over £50 cannot be accepted. Cheques are accepted and should be made payable to 'Farleigh School'. Development accepts payments by credit card which can be made by phone. All cash (or equivalent) gifts are processed via Development and any such gifts should be sent to:

*Development, Farleigh School, Red Rice, Andover, Hampshire, SP11 7PW*

- *Shares:* The school can accept publicly traded securities. Securities may be accepted

subject to completion of the necessary transfer formalities and the payment of any Stamp Duty. As a general rule, all marketable securities will be sold upon receipt unless otherwise directed.

- *Tangible personal property:* Tangible personal property includes art, furniture, books, school memorabilia, coin and stamp collections, jewellery, vehicles and any other personal property item owned by a donor. It excludes property and land. The school will examine a potential gift of tangible personal property for the item's financial value, its potential use by and significance to the school, any associated ongoing risks or costs to the school (e.g. insurance) and, if it is agreed with the donor that the item will not be used or kept, whether the item could be sold and converted into cash.
- *Property and land:* Gifts of property and land may include gifts of developed property or undeveloped land. Prior to acceptance of gifts of real estate, the school shall require a structural survey or other similar review of the real estate to ensure that it offers no significant on-going financial or environmental risks or costs to school. The cost of such survey or review will generally be an expense of the donor. Prior to acceptance of the real estate, the gift will have to be approved by school authorities. Farleigh may accept a remainder interest in a personal residence, farm, or second property subject to the provisions above. The donor or other occupants may continue to occupy the property for the duration of the stated life. On the death of the donor, the school may use the property or convert it to cash at their absolute discretion.
- *Bequests:* Development will gratefully accept bequests for the benefit of the school. The Development office asks donors wishing to leave a bequest to execute an appropriate codicil or include in their will. Farleigh is also keen that such donors notify the school if they would like to do so, in order for the school to keep accurate records of those who have made a provision in their will or codicil. In this way, the school can ensure that legacy pledge-makers can be appropriately thanked. Such notification is in no way binding and those notifying Farleigh of an intention to leave a gift in their will retain absolute rights over whether or not to fulfill this commitment.

## **B. Donors' Rights**

All fundraising solicitations, by or on behalf of Farleigh School, will disclose the school's name and purpose for which the funds are requested. Printed solicitations (however transmitted) will also include contact information and the registered charity number.

Gifts to the school will be processed promptly, acknowledged and receipted in good time and stewarded appropriately. Donors will be thanked by the most appropriate member of staff according to the type, size and purpose of the gift.

Donors and prospective donors are entitled to the following, promptly upon request:

- the most recent annual report;
- confirmation of the charitable status of Farleigh School;
- a copy of this code.

The privacy of donors will be respected. Any donor records that are maintained by Farleigh will be kept confidential to the greatest extent possible. Donors have the right to see their own donor record, and to challenge its accuracy.

Donors and prospective donors will be treated with respect. Every effort will be made to honour any requests to:

- limit the frequency of solicitations;
- not be solicited by telephone or other technology;
- receive printed material concerning the school;
- to remain anonymous. (Farleigh may however disclose details of any donor where it is required to do so by law, by any governmental or other regulatory authority, or by order of a court. Senior and select administrative staff will be by necessity aware of the real identity of the donor.)

Donors accept that the management and governance of programmes and/or activities funded through philanthropy, rests solely with the school. Donors will, however, be provided with appropriate and commensurate opportunities for continuing engagement with the programmes/activities that they have funded or are funding.

Most donors are deeply interested in the progress of the activity they have supported. Therefore, Development and other members of staff will seek to make follow-up contact with donors to inform them of the impact of their gift, and to offer additional thanks for their contribution.

The Development office will respond within 30 days to a complaint by a donor or prospective donor about any matter that is addressed in this policy. The Director of Development will attempt to satisfy the complainant's concerns in the first instance. A complainant who remains dissatisfied will be informed that he/she may appeal in writing to the Bursar, who will respond to this appeal within a further 30 days. If the issue remains unresolved the complainant may pursue the matter with the Governors.

### **C. Ethical Guidelines for the Acceptance of Gifts and Donations**

Farleigh's Development office undertakes that all communications made to potential donors concerning a project will be honest, truthful, and comply with the law and the Codes of Fundraising Conduct.

It is agreed that the basis on which the school will actively seek funding is:

- that the full cost of the project is identified (including staff costs; planning and works costs where applicable);
- that the project is approved by the senior team and Governors as being strategically important in enhancing Farleigh School's academic standing, facilities, and/or provision of bursary and scholarly places and prizes;
- that in the case of capital projects, any required applications for planning will have already passed - or if not, that this is made clear to prospective donors.

Donors are thanked and acknowledged via group and individualised communications and events as appropriate, as well as in any annual report. In some cases, donors will receive invitations to various dinners and events with staff members.

In the case of gifts to a fund for life-changing bursaries, donors are encouraged to give to the general cause, and whilst updates may be available for a particular pupil, no donor is publicly recognised as personally 'sponsoring' any one bursary recipient.

The Governors and Development are not responsible for the financial, tax or legal position of donors or of prospective donors in relation to their gifts. Donors or prospective donors must take such advice as they deem necessary and in no circumstances are they entitled to rely on guidance offered by the school and/or Development, whether written or verbal, which can only ever be generic in nature.

To comply with money laundering and related legislation as this might apply from time to time, Farleigh might require donors and potential donors to provide reasonable proof of identity and, if necessary, furnish information as to the origin of the gift to be donated.

Farleigh School reserves the right to consult published or other credible evidence if they suspect that a proposed gift will be made from a source that arises in whole or in part from an activity that:

- involved fraud; violated international conventions that bear on human rights, or limited freedom of enquiry;
- or that will require action that is illegal, seriously damage the reputation of the school, create adverse publicity, or that will create unacceptable conflicts of interest or harm the school's relationship with other benefactors, partners, potential pupils or the wider community.

Gifts from parents and families with children at the school are important because they help us to continue to provide high quality facilities and opportunities to all our pupils. Such gifts can be accepted if they support defined projects or opportunities available to a wide range of pupils, for example, a capital development or a bursary fund. Gifts cannot be made to offset school fees or the cost of a trip or activity for an individual pupil who is related or known to a donor.

Gifts from parents and families are most welcome and will be rewarded with the same gratitude and stewardship offered to other gifts. However, the decision of a parent to make or not make a gift to the school will have no bearing on the academic, sporting or extracurricular opportunities open to an individual pupil.

The school may accept philanthropic donations from pupils but there is no personal or academic gain to be got by any pupil from making such a donation.

The Development office will take reasonable steps to clarify the source of any donated funding. Previous decisions regarding the acceptance of particular gifts, taken in good faith, may be reviewed and may be reconsidered, in the light of new events or information.

Development may not accept gifts that are too restrictive in scope. Gifts that may be regarded

as too restrictive are those that are too difficult to administer or gifts that are for purposes outside the wider aims of the school. All final decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the school, although efforts will always be made to establish if the reasonable wishes of donors can be respected.

Where a change in circumstances prompts a donor to request the repayment of part or all of a donation, the final decision to repay a donation shall rest with the Governors.