

Ethical Fundraising Policy

Introduction & Scope

Bendrigg Trust is committed to its charitable aims and fundraises in order to deliver its charitable objectives. Bendrigg is committed to ensuring that fundraising activities are carried out in an ethical manner.

This policy seeks to cover the ethical issues and social responsibility within fundraising and covers all fundraising activities undertaken on behalf of Bendrigg Trust. This policy applies to the Board of Trustees; casual, permanent and contract staff; and volunteers.

Purpose

The purpose of this document is to identify Bendrigg's position on fundraising practice and to document the standards expected in raising funds from the community.

Policy

Bendrigg's guiding fundraising policy is a simple one – we will only use techniques that we would be happy to be used on ourselves. We respect the rights of our supporters to clear, truthful information on the work of Bendrigg Trust; to openly report on how we spend donated funds and to manage donors' information responsibly. In doing so, Bendrigg will adhere to the following standards:

- Fundraising activities carried out by Bendrigg will comply with all relevant Charity Commission and UK laws and legislation, including but not limited to:
 - Charities Act 1992, 2006, 2011 & 2016
 - Data Protection Act 2018
 - Licensing Act 2003
 - Gambling Act 2005
 - Safeguarding Vulnerable Groups Act 2006
 - Equality Act 2010
- As voluntarily members of the Fundraising Regulator's scheme, Bendrigg commits to the Fundraising Promise and follows the Code of Fundraising Practice
- All funds raised via fundraising activities will be for the stated purpose of the appeal and will comply with Bendrigg's stated mission and purpose
- Nobody directly or indirectly employed by or volunteering for Bendrigg Trust shall accept commissions, bonuses or additional payments for fundraising activities on behalf of the organization.

Fundraising Sub-Committee

A Fundraising & Marketing Sub-Committee will oversee the major fundraising tasks. This committee will report regularly to the Board of Trustees and will include at least one Trustee in its membership at all times.

Personal Information

All personal information collected by Bendrigg is confidential and is not for sale or to be given away or disclosed to any third party without consent. Donors can choose at any time to make an anonymous donation or to have their previous records anonymised. Our Privacy Policy details how we collect, store and use your data.

Fundraising Activities

Fundraising activities should not be undertaken if they may be detrimental to the good name or community standing of Bendrigg Trust.

No general solicitations shall be undertaken by telephone or door-to-door.

Any communications made to the public in the course of carrying out a fundraising activity shall be truthful and non-deceptive.

A statement estimating income and expenses will be prepared prior to the commencement of any new fundraising activity that may present a financial risk to Bendrigg Trust. Fundraising activities will not be undertaken if they will expose the organisation to significant financial risk.

Anyone wishing to fundraise for Bendrigg Trust is encouraged to let the Fundraising Team know by completing an online form available on our website. Anyone fundraising in aid of Bendrigg who has not made their activities known to us will be deemed to be acting independently of Bendrigg Trust and as such the charity takes no responsibility for their actions.

Any documentation produced relating to fundraising must display the charities' registration number (508450).

Portrayal of people with disabilities

Bendrigg Trust will not portray disabled people in a way that reinforces negative stereotypes or attitudes. This includes, but is not limited to, portraying people with disabilities as dependent, 'suffering' or separate from society. Bendrigg seeks to challenge these perceptions and remove social barriers. Any portrayal of people with disabilities in our fundraising will be respectful and include positive messages and images.

Acceptance and use of donations

If supporters wish to make a donation to a specific area of Bendrigg Trust's work (e.g. for specific equipment or a specific project), they may make a restricted donation by providing written instructions to this effect at the time they make their donation.

Donations where no use is specified by the donor will, as standard, be applied to the Bendrigg Subsidy Fund. In some circumstances the Principal and/or Senior Fundraising Officer may allocate unspecified donations to other projects or activities.

We abide by the law which requires us, in deciding whether to accept or refuse a donation, to consider which action is in the charity's best overall interest. Financial contributions will only be accepted from companies, organisations and individuals the Board of Trustees considers ethical. The responsibility of the judgement on whether Bendrigg Trust should refuse a donation lays first with the Principal, Management Committee and ultimately Council.

Donor Recognition & Stewardship

Donations will be recognised according to the guidelines set out in Bendrigg's Stewardship procedures. This document also sets out guidelines for communications to supporters to maintain effective relationships.

Handling of donations and funds raised

Funds raised for Bendrigg Trust belong to the charity and, once collected, must be paid over to the charity in a timely manner.

All donations and funds raised must be recorded on the charity's fundraising database, ETapestry, on a weekly basis.

Donations can be made in a variety of ways:

- Online through Bendrigg website: these are recorded automatically on the database and funds transferred to Bendrigg's bank account weekly. The Fundraising Officer notifies the Bursar of all incoming donations and any specific funds that these must be attributed to. Paper copies of all disbursements are kept in a dedicated file. Payment details are never printed and remain online within the secure payments processor.
- Online through other websites: Bendrigg has a presence on a number of online giving platforms including JustGiving, Virgin Money Giving, CAF, Charities Online, Facebook and PayPal Giving. Each of these platforms have different disbursement timetables and reporting formats. The Fundraising Officer monitors these platforms and notifies the Bursar of all incoming donations and any specific funds that these must be attributed to. Paper copies of all disbursements are kept in a dedicated file.
- Direct Bank Transfer: some donations are made by standing order and other donors have our bank details for one-off transactions. The Bursar monitors all income through the account and liaises with the Fundraising Officer regarding any unknown donations. These are entered manually onto the donations database by the Fundraising Officer.
- Through the post or in person: any cheques or cash received in this way are passed first to the Fundraising Officer before going to the Bursar. The Fundraising Officer notes the details of the donation and keeps any paperwork before passing the donation to the Bursar for processing and banking. These are entered manually onto the donations database by the Fundraising Officer. For one-off or miscellaneous donations, paperwork is filed in order of receipt in a file for each financial year. For specific project donations, particularly grants, paperwork may be filed in a dedicated folder for that project.
- Petty Cash: small donation amounts in cash are recorded by the Bursar in Petty Cash. This is processed on a monthly basis by the Bursar and a report produced. The Fundraising Officer enters any small donation amounts from this report onto the donations database.

Donations can be made anonymously and will be recorded as such on Bendrigg's donations database.

Corporate Partners

Bendrigg Trust follows a due diligence process before engaging in a partnership ensuring there are no current or potential conflicts of interest. Bendrigg Trust will not endorse products or companies and any corporate partnership does not imply approval or endorsement of any corporate policies. Any activities or relationships that would tarnish the reputation or integrity of Bendrigg Trust will not be approved.

Where appropriate, Bendrigg will provide recognition of corporate support in a variety of ways which will be agreed in advance with each partner. These may include but are not limited to; a page on our website, inclusion in our monthly newsletter and press releases.

Applications for funding or support

Staff members, other than the Principal or Fundraising Team, are not authorised to apply for funding or grants to companies, grant-making trusts and foundations, philanthropic groups or public bodies without the prior consent of the Senior Fundraising Officer or Principal.

Unauthorised activities

Collections

It is the policy of Bendrigg Trust not to engage in house-to-house collections or telephone fundraising.

Balloon releases and sky/Chinese lanterns

It is the policy of Bendrigg Trust not to engage in balloon releases or the release of sky/Chinese lanterns due to the harmful effects to wildlife and the environment, even when these products purport to be bio-degradable.

Other activities sensitive to the environment

Bendrigg values the outdoor environment and, together with our visitors, we foster a sense of appreciation and environmental responsibility. Any fundraising activity will not be approved if it is deemed to have a detrimental environmental impact.

How to make a complaint regarding fundraising

Anyone wishing to make a complaint to Bendrigg Trust regarding fundraising should contact the Senior Fundraising & Marketing Officer in the first instance who will respond within 10 working days.

Email: sarah@bendrigg.org.uk

Phone: 01539 723 766

Post: Sarah Garman, Senior Fundraising & Marketing Officer, Bendrigg Trust, Bendrigg Lodge, Old Hutton, Kendal LA8 0NR

Alternatively, if your complaint is in relation to the Senior Fundraising & Marketing Officer please contact the Bendrigg Principal, Nick Liley who will respond within 10 working days.

Email: nick@bendrigg.org.uk

Phone: 01539 723 766

Post: Nick Liley, Principal, Bendrigg Trust, Bendrigg Lodge, Old Hutton, Kendal LA8 0NR