

## **Fundraising Policy and Procedure**

### **Policy No 17**

#### **Overview**

The charity's income will derive from several sources:

- Unsolicited donations
- Gifts in Kind
- Proceeds of fundraising events organised by the charity
- Proceeds of fundraising events undertaken by volunteers in aid of the charity
- Corporate donations
- Proceeds from partnerships with fundraising organisations (e.g. Easy Fundraising and Smile Amazon)
- Grants
- Gift Aid
- Legacies

#### **Basic do's and don'ts**

1.1 All funds raised in the name of the charity must be paid into the charity's bank account.

1.2 The charity will not accept donations from organisations whose income is primarily from the following sources:

- Gambling companies/organisations (other than the charity's own lottery)
- Companies/organisations associated with the tobacco or tobacco replacement industry
- Companies/organisations associated with the 'leisure use' drug industry
- Single issue organisations that could be associated with lobby groups or potentially bring into disrepute
- Political parties
- Any other donor with whom an association might potentially bring the H&G Trust into disrepute

1.3 The charity will not undertake door to door collections.

#### **Unsolicited Donations**

2. Any unsolicited donations will be dealt with as follows:

- Bank the donation
- Notify the Treasurer with amount of donation and details of donor
- Thank you letters for donations sent out on the charity letterhead with a receipt and a gift aid form (if donor has not already filled out a gift aid form)
- Note any requests made by the donor
- If possible, note the motivation behind the donation.

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- Include a reference to the charity in all correspondence replying to compliments.
- Put a link to the charity website and newsletter sign up button in email footers.

## Gifts in kind

3.1 The charity will receive gifts in kind where these:

- Directly support delivery of the charity strategy
- Can be used to raise funds for the charity (e.g. items to be raffled or auctioned)
- Enable the charity to thank its volunteers by allowing them to enjoy an offer of hospitality.

3.2 The charity and its volunteers should refuse gifts:

- Where acceptance may give rise to, or foster the suspicion that, acceptance may lead the Trust, its employees or its volunteers to show favour or disadvantage to any person or organisation
- That are intended for the personal use/benefit/enjoyment of the individual receiving the gift rather than being a donation to the charity.

3.3 The charity has a duty to protect the reputation of the Trust, and all offers of gifts in kind and hospitality that exceed normal, reciprocal provision of sandwiches/coffee etc at a meeting or event should be referred to the Treasurer / Trustees for approval before being accepted. This will enable the charity effectively to safeguard the Trust and itself against accusations of being open to undue influence and to manage potential conflicts of interest.

## Proceeds of Fundraising Events

4.1 When fundraising events are organised by the charity, the event plan must detail:

- How funds are being collected on the day, and who by
- The 2 people responsible for counting cash collected
- The arrangements for banking funds raised and/or notifying the Treasurer
- Whether any plans for raffles or on street collections require a licence
- If a licence is required, evidence that it has been obtained.

4.2 Volunteers and staff organising fundraising events in aid of the charity must register their event with the Treasurer so that he/she can ensure that the planned event complies with charity regulation and requirements, that the fundraiser is appropriately insured and can support/advise on /approve plans as required.

## Grants

5.1 Anyone making a grant application on behalf of the charity should send a draft of the application form to the treasurer for checking and approval before it is submitted.

5.2 The outcome of all grant applications should be shared with the trustees, regardless of whether the application was successful. This will allow accurate data to be captured and analysed, which will inform future fundraising

## **Corporate donations**

6.1 Anyone planning to approach a commercial or corporate partner to solicit sponsorship, a donation of cash, fundraising activity or a gift in kind should contact the Board of Trustees before any such approach is made. This is to ensure that the planned ask is appropriate, to ensure effective co-ordination of such approaches and effective capturing and analysis of data that can then be used to inform future fundraising.

6.2 The outcome of all approaches to corporate partners should be shared with the Board, regardless of whether the approach was successful. This will allow accurate data to be captured and analysed, which will inform future fundraising.

6.3 Anyone who is contacted by an outside organisation wishing to sponsor or make a donation should refer the organisation to the Chairman who will be responsible for ensuring that the gift is compliant with our procedures.

## **Legacies**

7.1 Any enquiry from an individual seeking information about making a bequest to the charity should be referred to the Treasurer, who will follow up with the individual concerned.

Approved March 2020 and to be reviewed March 2023