



Fundraising Policy

Introduction

This policy is intended to provide information on the principles and guidelines for fundraising from all sources.

The policy addresses The Joshua Tree's commitment to the Code of Fundraising Practice, as well as outlining the responsibilities of staff, Board members and volunteers involved with fundraising.

The policy covers all staff, trustees, volunteers, sessional workers and supporters of The Joshua Tree.

Policy and procedure

All fundraising activities, wherever possible, should be approved by The Joshua Tree.

Code of Fundraising Practice

The Joshua Tree will ensure that all trustees, managers, staff and volunteers carrying out fundraising activity are expected to act in accordance with the Code of Fundraising Practice, see <https://www.fundraisingregulator.org.uk>

We will adhere to the principles of the Code, namely that The Joshua Tree fundraising will always be legal, honest, open and respectful.

When conducting fundraising activities, we will be clear about who we are and what we do.

We will provide anyone fundraising on our behalf with a copy of The Joshua Tree Fundraising Guide or this can be viewed on the website <https://thejoshuatree.org.uk/wp-content/uploads/Fundraising-Guide.pdf>. We will ensure to monitor fundraisers, volunteers and third parties who work with us to raise funds on our behalf, to ensure that they comply with the Code of Fundraising Practice.

We will ensure that our complaints process is clear and easily accessible and we will keep a record of the number of complaints we receive each year.

We will ensure that specific types of communication do not go to those people who choose not to receive them in line with our GDPR policy.

Legal requirements, data protection and general principles



Staff will ensure they comply, in all fundraising activities, with the law as it applies to charities and fundraising. This includes the General Data Protection Regulation, see The Joshua Tree's GDPR Policy.

All funds raised will be used for the benefit of The Joshua Tree within a reasonable and appropriate timeframe. We recognise that donors have the right to obtain complete and timely information on how their funds are used and, with best endeavors, The Joshua Tree will provide this if requested.

Accurate records of all donations, grant applications and funding bids will be collected and stored by the Income Generation Team.

Personal information provided to The Joshua Tree will be kept confidential and will not be sold, rented, or given to any third parties without consent in line with the GDPR Policy which can be viewed through The Joshua Tree website.

Staff shall not exploit their position for personal gain by receiving personal funds or goods through fundraising. The only financial gain to staff will be payment via salary.

Funds will not be accepted from organisations or individuals where the CEO or Board of Trustees considers there is reasonable evidence to suggest that association with the individual or organisation may lead to disrepute.

The Joshua Tree must not engage in fundraising which is an unreasonable intrusion on a person's privacy, is unreasonably persistent or places undue pressure on a person to donate.

Marketing

All printed materials used for fundraising and the content of all online fundraising campaigns must be independently proof-read, then reviewed and approved by either the CEO or Communications & Fundraising Manager prior to being printed and published.

The Joshua Tree will not conduct any cold calling or door to door solicitation of the public.

The Joshua Tree will ensure all publicity and promotional activities are truthful and do not exaggerate.

We will not use images or words that in any way compromise the dignity of any human being or which intentionally cause distress or anxiety.

Fundraising Events



The CEO and Communications & Fundraising Manager shall be given full access to the revenue/expenses of the event.

The Communications & Fundraising Manager and the Events & Fundraising Coordinator will ensure that adequate risk assessments are carried out prior to the event taking place.

Where possible all costs of fundraising events will be covered by participants to ensure that all sponsorship received will go directly to cover the charitable work of The Joshua Tree.

Individual Donations

All supporters, where known, are directed to The Joshua Tree Fundraising Guide <https://thejoshuatree.org.uk/wp-content/uploads/Fundraising-Guide.pdf> on The Joshua Tree website. All donations received are recorded and tracked on the charity database and thanked in line with the Donation Recognition Guidance.

Corporate Donations

Anyone planning to approach a commercial or corporate partner to solicit sponsorship, a donation of cash, fundraising activity or a gift in kind should refer to the Corporate Partnerships Officer 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.

Anyone who is contacted by an outside organisation wishing to sponsor or make a donation should refer the organisation to the Corporate Partnerships Officer or Communications & Fundraising Manager who will be responsible for contacting the organisation.

Grants

Anyone making a grant application on behalf of the charity should send a draft of the application form to the Charity CEO or Corporate Partnerships Officer for checking and approval before it is submitted.

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



Legacies

Any enquiry from an individual seeking information about making a bequest to the charity should be referred to the Communications & Fundraising Manager who will follow up with the individual.

Fundraising with People in Vulnerable Circumstances

Fundraisers should assume that a person has the mental capacity to make a donation unless, in light of the following, it is established that they lack capacity.

If a fundraiser knows or has reasonable grounds for believing that an individual lacks capacity to make a decision to donate, a donation must not be taken. A donation given by someone who lacked capacity at the time of donating must be returned.

Whilst it is recognised that fundraisers are not trained as experts in the field of capacity assessment, they should be aware that, in order to have capacity to make a gift, a donor must understand the transaction. The amount of information a person must be capable of understanding and considering in order to have capacity to make a decision will depend on the nature of the transaction; a one-off donation of £5 requires a lower degree of understanding than setting up a regular donation worth hundreds of pounds, which requires a more significant degree of understanding on the part of the donor.

Fundraisers should consider whether a donor understands and can retain the information they are being given, whether they can use that information in the process of making a decision to donate, and whether they can communicate that decision by whatever means. If they are unable to do any one of these, then the potential donor is unable to make a donation.

Gift Aid

Gift Aid charity repayment will be claimed from HMRC wherever applicable.

This policy was reviewed: February 2021

Next review date: February 2023