



# Wellington School Fundraising and Gift Acceptance Policy

*This policy refers to both Wellington Senior School and Wellington Prep School*

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Date Reviewed	September 2021
Date of Next Review	September 2022
Website	Yes

## **Background**

The Governors of Wellington School and the Trustees of the Wellington School Foundation welcome offers of donations of all sizes, which enable the continuing development of the School over the long term.

Donations must be freely given with no expectation of anything in return other than due thanks and recognition. The Governors and Trustees are pleased to accept lawful donations which are given in good faith and which are compatible with the School's aims, values and strategic objectives. The Governors and Trustees do not accept donations when a condition of acceptance would compromise its autonomy, integrity and reputation.

This policy seeks to outline the principles by which Wellington School Development Office will or will not pursue potential donations, and to establish guidelines governing potentially controversial gifts or donors. Its purpose is to give prospective donors the greatest freedom possible in formulating their gifts, whilst safeguarding the best interests of Wellington School.

## **Ethical Fundraising Principles**

1. Fundraising solicitations on behalf of Wellington School will:
  - Be truthful;
  - Accurately describe the intended use of donated funds;
  - Be made in accordance with any applicable requirements under charity law and the Fundraising Regulator
  - Respect the dignity and privacy of those who benefit from donations.
  
2. Volunteers and employees who solicit funds on behalf of the School shall:
  - Adhere to the provisions of these guidelines;
  - Act with fairness, integrity, and in accordance with all applicable laws;
  - Adhere to the provisions of any applicable professional codes of ethical practice which apply to them as individuals;
  - Cease solicitation of a prospective donor who identifies solicitation as harassment or undue pressure;
  - Disclose immediately to the Headmaster and Governing Board any conflict of interest;
  - Not accept donations for purposes that are inconsistent with the School's strategic and educational objectives.
  - Not accept donations if the proposed donation arises in whole or in part from any illegal activity
  - Paid fundraisers, whether employed staff, short-term contractors or consultants, will not be paid finders' fees, commissions or other payments based on either the number of gifts received, or the value of funds raised. They will be compensated by a salary, hourly wage or fee. Their compensation will be consistent with the School's policies and practices that apply to non-fundraising personnel.
  - Operate fundraising appeals in a cost-effective manner and report fundraising income and expenditure accurately in our accounts.

3. Any donor records held by Wellington School Development Office will be maintained in accordance with the School's data protection policy which can be found on the School website.
4. The School will not sell its donor and alumni lists and contact details.
5. The Governing Board will be informed at least annually of the number and nature of any complaints received from donors or prospective donors about matters that are addressed in these guidelines.

### **Donor Thanks and Recognition**

1. Formal acknowledgement of all donations will be sent to each donor upon acceptance of the gift.
2. Unless the donor wishes to remain anonymous, the donor's name may be listed in the annual report, on the School website and may also appear in other print and online materials prepared by the Development Office. The amount given will not normally be stated and will only ever be specified with the donor's written consent.
3. In cases where a donor wishes to remain anonymous, such anonymity will be respected for all public purposes. The School will, 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. The identity of anonymous donors will be known only to the Headmaster, the Director of Development, and the Chair of Governors, and to those School staff who process the gift.

### **Gift Acceptance**

The Governing Board and The Trustees encourage the solicitation and acceptance of gifts and grants that enable it to fulfil its strategic objectives. Gifts may be sought from individuals, corporations, foundations and trusts. They will be sought only for purposes that have been approved by the School's Governing Board. The School is legally obliged to adhere to the terms and conditions of every gift. For this reason, the terms of each gift must be considered with the utmost care to be sure they are feasible, do not unduly hamper the usefulness and desirability of the gift, and are in accordance with the School's relevant policies.

The School is unable to accept gifts which are too restrictive in purpose or inconsistent with the stated academic purpose, priorities and strategic objectives of Wellington School. Gifts that may expose Wellington School to adverse publicity, require expenditure beyond the School's resources, or involve the School in unexpected responsibilities because of their source, condition, or purposes, will not be accepted. Gifts received by Wellington School must not inhibit it from accepting gifts from other donors. The School also cannot accept gifts which involve unlawful discrimination on any basis. Gifts that may result in current or future financial obligations for the School or that will have an impact on school facilities and grounds will require prior approval of the Governors.

## **Use of Different Types of Gift**

### **1. Unrestricted gifts**

Unrestricted gifts are those placed at the immediate disposal of Wellington School. They may be expended on any purposes approved by the Governors and Trustees.

### **2. Restricted gifts**

Restricted gifts are placed at the immediate disposal of Wellington School and must be expended on purposes defined by the donor, such as means-tested bursaries. They are accepted according to the terms outlined in this policy. Donor restrictions are accepted only when they do not add unapproved budgetary or administrative burdens on Wellington School.

### **3. Real Estate**

The School may accept a donation or legacy of unencumbered property. The Governing Board and the Trustees have a legal responsibility to act always in the best interest of the School. Donors should be aware that this may involve selling any donated land or property and using the proceeds to advance the School's strategic and educational objectives. For this reason, donors considering donations or legacies of real estate are encouraged to consult the Development Office at an early stage.

### **4. Gifts of other tangible personal property**

Donations of jewellery, artwork, collections, and equipment may be accepted. Donors should be aware that the School has limited space and is not able to expend funds on additional storage facilities of a specialist nature or offsite without Governors' approval. For these reasons the School and the Foundation reserve the right to sell any donated tangible personal property. Such items will not be sold for as long as the Governors deem the donation to have an educational purpose related to the mission of the School. The School and the Foundation will follow all HMRC guidelines in connection with disposing of donations of tangible personal property and filing of appropriate tax reporting forms.

### **5. Endowments**

Endowment gifts will be managed according to the investment and expenditure policy approved by the Governors and the Trustees. Unrestricted endowment gifts are encouraged.

### **6. Legacies**

A legacy is a gift of any amount or form made to Wellington School in a donor's will. Legacies may be residuary, pecuniary, specific legacy bequest, or reversionary.

### **Note on endowments and legacies**

Donors should be aware that over the (sometimes many) years following the establishment of an endowment or a legacy gift, the needs, policies, and circumstances of Wellington School can change in unforeseen ways. The Governors and the Trustees must have the flexibility to make use of funds in the best interests of the School, while doing so in accord with donor interests and specifications. For this reason, donors are advised to describe the specific purposes of their gifts as broadly as possible and to avoid detailed limitations and restrictions. Donors considering legacies for a specific purpose are encouraged to consult the Development Office at an early stage.