



ST BENEDICT'S SCHOOL  
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## Gift Acceptance and Fundraising Policy

Authorised by: SET  
Date: September 2021  
Review Date: September 2023  
Signature:

# Contents Page

	<b>PAGE</b>
1. Introduction .....	3
2. Definition and Scope.....	3
3. Gift Acceptance and Fundraising principles .....	3
4. Process for review .....	4
5. Naming recognition .....	4
6. Gift Agreements.....	4
7. Gift Processing, Acknowledgement and Stewardship.....	5
8. Fundraising Complaints Procedure.....	5

## **1. Introduction**

This document outlines St Benedict's School's policy for accepting donations and details the principles under which the School operates when undertaking its fundraising activities. St Benedict's School is a registered charity (no. 1148512), registered with the Fundraising Regulator and Institute of Development Professionals in Education.

The policy is intended for the School community and for prospective donors and their advisors, providing assurance that all donors are treated equitably, and that the School's reputation and achievements are not put at risk.

On behalf of St Benedict's and the Governors, the St Benedict's Development and Alumni Relations Office solicits gifts from individuals and corporations to help further the development of St Benedict's School.

St Benedict's will not accept donations where sources fall short of the standards determined in this document, or if a gift has been illegally or unethically obtained, or if acceptance may damage the reputation of the School.

## **2. Definition and Scope**

This policy applies to all philanthropic donations received. A donation, or gift, is a voluntary transfer of assets by an individual or organisation, made with philanthropic intent for the benefit of St Benedict's, this includes:

- Donations received from individuals in the UK or overseas
- Donations from companies in the UK or overseas
- Donations from legacy bequests
- Grants from charitable trusts and foundations in the UK and overseas

## **3. Gift Acceptance and Fundraising principles**

Donations are accepted and held by St Benedict's. In considering the acceptance of any donation, St Benedict's will consider if the donation is compatible with the purposes and goals outlined in all relevant policies and regulations.

St Benedict's will not accept donations which go against St Benedict's interests. Examples include:

- Do not further, or are in conflict, with St Benedict's values and mission
- Could create unacceptable liability or controversy
- Fail to meet the requirements of the Equalities Act 2010
- Violate the terms of this policy, or other policies of St Benedict's

The fundraising undertaken on behalf of St Benedict's School will:

- Be truthful
- Accurately describe the intended use of funds donated
- Adhere to applicable requirements under charity law and the Fundraising Regulator Code of Fundraising Practice.

Employees who solicit funds on behalf of the School shall adhere to these guidelines and disclose immediately to the Headmaster any conflict of interest and not solicit or accept donations for purposes inconsistent with the School's objectives.

Paid fundraisers will not be paid with finders' fee, commissions or compensation based on number of gifts received or funds raised. They will be paid by salary, and their compensation consistent with the policies and practices that apply to non-fundraising staff.

#### **4. Process for review**

All donations which raise ethical concerns or have a value above £50,000 can only be accepted by the Headmaster and will be subject to due diligence, or review in relation to the acceptance of the principles above. The due diligence review will be conducted by the Development & Alumni Relations Department and presented to the Headmaster, who will seek further advice from the School's Governors, as appropriate.

In addition, under Money Laundering Regulations, St Benedict's has a responsibility to carry out due diligence checks on any amount over £10,000. This primarily applies to gifts from countries listed as high risk, requiring Enhanced Due Diligence, along with those received from individuals and organisations previously unknown to St Benedict's, and with no obvious connection to us.

Approval by the Headmaster must be obtained prior to a proposal for a donation being submitted to the potential donor, or when a donor approaches the School before negotiations with the donor can continue.

Review may also be required, where:

- Significant naming rights are attached
- The donation is not monetary (e.g. a gift of shares or property)
- The cost to the School to administer the gift is greater than the value of the gift
- The donor is not someone with whom the School wishes to be associated.
- The donation is from a country which places restrictions on its residents making overseas donations
- The donor, donor's family, or donor's friends and associates will derive undue benefit from the donation
- The donor may be in a vulnerable position and lack capacity to make a decision with regards to donating to St Benedict's.

#### **5. Naming recognition**

Donations which involve naming will be subject to levels of approval as follows:

- Naming of any building or grounds, as part of a donor agreement, will be subject to review and approval from the Governors of the School, upon the advice of the Headmaster.
- Naming of portions of a building or a classroom, as part of a donor agreement, will be subject to review and approval from the Governors of the School, upon the advice of the Headmaster.
- Naming of any other academic position, as part of a donor agreement, will be subject to review and approval from the Governors of the School, upon the advice of the Headmaster.
- Naming of a scholarship, bursary, award or prize, as part of a donor agreement, will be subject to review and approval from the Governors of the School, upon the advice of the Headmaster.

Approval needs to be obtained before any funding announcement becomes public.

Naming may be withdrawn on the recommendation of the Headmaster where subsequent concerns regarding the source of funding, or the individual, or organisation named.

#### **6. Gift Agreements**

For restricted gifts of over £5,000, Gift Agreements must include details of the gift, the project to be supported, fulfilment schedule (if applicable), naming rights (if applicable), relevant stewardship and recognition information. This information will be recorded on Raisers Edge under the relevant constituent profiles.

With regards to pledges, where payments surpass the project timeline, the donor will be contacted by the Development and Alumni Relations Office to discuss the future use of the remaining funds.

## **7. Gift Processing, Acknowledgement and Stewardship**

All donations to St Benedict's must be processed by the School's Finance Department and recorded confidentially by the Development and Alumni Relations Office to ensure compliance with this policy.

St Benedict's School accepts the follow types of assets as a donation:

- Cash
- Securities – stocks and bonds
- Property and other real estate
- Gifts-in-kind

A donor's right to remain anonymous externally will be maintained, but full details will be recorded by the Development and Alumni Relations Office with the School's donor database, Raisers' Edge, and this policy will apply. Donor records are held in accordance with St Benedict's Data Protection Policy.

A gift will only be accepted where the identity of the donor is provided. St Benedict's is committed to the public and private recognition of its donors where desired. Each donor can expect to receive a formal and personalised letter from the Headmaster. All donors and bequest intentions will receive appropriate acknowledgement and recognition for their pledges and gifts, as well as assurance that their gift is used for the purposes designated.

## **8. Fundraising Complaints Procedure**

St Benedict's School is registered with the Fundraising Regulator. We are committed to best practice and take all complaints very seriously.

If you have a concern or complaint about our fundraising, please contact us:

- Email Catherine Bedwin, Bursar at [bursar@stbenedicts.org.uk](mailto:bursar@stbenedicts.org.uk)
- Write to us at St Benedict's School, 54 Eaton Rise, Ealing, London, W5 2ES
- Call us on 020 8662 2000

For further details on St Benedict's Complaints Procedure, please view our [Concerns & Complaints Policy](#).