

**Calvert Trust Exmoor**

**Date: Approved by Trustees March 2023**

**Review Period: 2 Years**

**Next Review Date: March 2025**

## 1.1. Overview

To support Calvert Trust Exmoor's work and activities we fundraise through a broad range of sources including sponsorship schemes, donations, grants and statutory income. This policy covers all fundraising activities undertaken by our staff, volunteers and Trustees. It documents the standards which are fundamental to our fundraising activities which are transparent, ethical and responsible.

## 1.2 Responsible Fundraising Standards

Our key standards of responsible fundraising are:

- All fundraising practices will reflect Calvert Trust Exmoor's values and will not compromise the reputation of the Charity, our guests, stakeholders or donors.
- We will be accountable and responsible in our fundraising activities.
- Our fundraising communications will be truthful and transparent.
- All funds raised via fundraising activities will be for the stated purpose and will comply with our mission and aims.
- We will not engage in fundraising which is: an unreasonable intrusion on somebody's privacy; unreasonably persistent; or places undue pressure to donate.
- We will not take advantage of mistakes made by donors and will proactively rectify this or work to any changes in decisions by funders.
- We will carry out due diligence on the efficacy of certain opportunities for support to ensure that they are appropriate.
- We will comply with all relevant legislation and maintain registration with the Fundraising Regulator, abiding by their [Fundraising Code of Practice](#).

## 1.3 Accepting Donations

We follow the Charity Commission's '[Know your Donor](#)' principles and make reasonable and appropriate attempts to identify both individuals and organisations that support us, particularly where large sums are donated. All anonymous donations over £25,000 will be reported to the Charity Commission.

The following standards will be applied to all donations of more than £10,000 which come from a trust or foundation, company or individual donor. We will not accept donations or sponsorship:

# Ethical Fundraising Policy

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- Where it would be unlawful to do so (for example, if a gift is known to be the proceeds of crime).
- Which are made anonymously through a third party who will not identify the donor.
- When we believe that a supporter lacks the capacity to make a decision.
- From individuals or organisations whose objectives conflict with those of Calvert Trust Exmoor and could lead to a disproportionate decline in support for the charity.
- Where a donor is known for activities which directly harm individuals, e.g., tobacco.
- Finally, we are always mindful of the impact that our work and those that we work with has on the environment and are committed to reducing environmental impacts wherever possible.

When necessary, we will review or conduct due diligence on donation. For instance:

- When a donation offered is over £10,000.
- When it is known an individual or organisation's activities cause direct harm to others.
- When a donor is reputable for unethical employment practices or has a poor record for equal opportunities and diversity.

When a donation has cause for concern, they will be referred to the Centre Director and the Board of Trustees.

## 1.4.1 Some resources

- We are members of the Fundraising Regulator and here you may access the [Code of Fundraising Practice | Fundraising Regulator](#)
- We are members of the Chartered Institute of Fundraising and a practical guide on dealing with donations may be found here, [Chartered Institute of Fundraising - Accepting, refusing and returning donations \(ciof.org.uk\)](#)
- Charity fundraising guide for Trustees may be accessed here, [Charity fundraising: a guide to trustee duties \(CC20\) - GOV.UK \(www.gov.uk\)](#)