

# Charity Fundraising Protocol



Thank you so much for deciding to fundraise on behalf of Quartet Community Foundation and the communities we support. Because of you we will be able to fund more vital projects for those in need in our region, and help more people to fulfil their potential.

As a charity we are required to adhere to legal requirements when raising funds. Where you or a group you represent are fundraising on behalf of Quartet Community Foundation, please follow the protocols below. These protocols meet the Charity Commission's 2016 fundraising principles guide (CC20) and the 'Fundraising Regulators' 'Code of Fundraising Practice', and apply to those fundraising on behalf of a specific fund within Quartet as well for Quartet fundraising in general.

## Key principles - Integrity of fundraising

There are several legal principles underpinning fundraising, including:

- All funds raised for a particular cause must be used for that particular cause;
- Donations must be used in accordance with the donor's stipulations or particular conditions on the use of the donation;
- Fundraisers must take all reasonable steps to treat a donor fairly providing the information required to enable a donor to make an informed decision – taking into account the specific needs of the donor and especially those who may be in a vulnerable circumstance. Information must be provided accurately and without exaggerating facts relating to beneficiaries and without denigrating other organisations;
- Fundraising must be carried out without unreasonable intrusion on a person's privacy and without being persistent or putting unreasonable pressure on making a donation;
- If an appeal is being run for a particular purpose, fundraisers must include a statement indicating what will happen to funds received if the total funds raised are insufficient or exceed the target;
- All donations received must be acknowledged promptly by the charity.

## Data protection

To comply with data protection law, donor information remains confidential and should not be shared with any other organisation or person unless agreed with the donor. Use of a

donor's name, information in a case study<sup>1</sup> or other publicity that could identify a donor must have the explicit consent of the donor.

## Handling Donations

- Volunteers raising money on behalf of the charity must ensure that the organisation receives all the money raised;
- Donations made in cash must be counted and recorded by no fewer than two Quartet Community Foundation staff (i.e. not the fundraisers themselves) and banked as soon as possible. Children under 16 must not be left with overall responsibility for handling money;
- Unsecured cash must never be left unattended or in an unattended environment;
- Reconciliation between cash banked and income summaries must be made as soon as possible and where practical, undertaken by a person independent of the counting and cashing up of the money;
- Cheques or charity vouchers must be sent to Quartet Community Foundation (Registered office address: Royal Oak House, Royal Oak Avenue, Bristol BS1 4GB) and banked promptly, within one or two working days;
- Only Quartet Community Foundation's authorised and sealed charity collection buckets should be used and they must only be opened by a Quartet Community Foundation representative.

## Tax benefits of giving

Information about the tax benefits of giving (such as Gift Aid) are available from Quartet Community Foundation and on our website ([www.quartetcf.org.uk](http://www.quartetcf.org.uk)). When discussing financial elements or legacies, fundraisers must state that they are not qualified or in a position to offer financial or legal advice and that the potential donor should seek advice from their adviser.

## Fundraising costs

Any costs in relation to fundraising must be approved prior to the expenditure being committed. Quartet regularly seeks sponsorship and support for events and functions to support our costs.

Deductions for expenses must be agreed with Quartet Community Foundation and any deductions made after receipt of the donation.

## Events

The Community Foundation must be notified of any events planned in their name or when raising money for the Foundation. Insurance cover must be discussed and agreed with the Foundation and the relevant insurance including public liability put in place prior to the event.

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<sup>1</sup> Please call us on 0117 989 7716 for Marketing and Communications support and for a copy of our official consent form to produce a donor/recipient case study and any photographs.

The Community Foundation has an events checklist to help with event planning and organisation. For more information contact our team on [info@quartetcf.org.uk](mailto:info@quartetcf.org.uk). When planning an event the following should be considered:

- equal access is available for all;
- the maximum numbers for the venue;
- complies with legal requirements for health and safety;
- venue/location is fit for purpose and any restrictions are noted;
- appropriate insurance including public liability is in place;
- what specialised equipment is required;
- permissions or licenses are obtained from the local authority or other relevant organisation;
- a risk assessment is undertaken including details of fire exits, first aid and equipment provisions and the environmental impact, plus considering whether or not any marshals, stewards or additional support is required for the event.

### **'In aid of' managed events**

Where a volunteer or organisation is acting independently and fundraising 'in aid' of the Foundation by organising a third part event, the body responsible for the event must notify the Foundation and accept responsibility for the organisation and liability of the event. Arrangements for the timely transfer of funds to the charity should be in place.

### **Fundraising communications**

- Quartet's Registered Charity Number (1080418) must be stated on the website, electronic donation pages and documents including leaflets, flyers, invitations, advertisements, articles, press releases, receipts and other documents used to fundraise;
- All communications and documents should clearly state what the public funds are being raised for and these funds must then be used for these purposes;
- Quartet Community Foundation must approve the wording of any communication or documents such as fundraising leaflets or when speaking formally on behalf of the Foundation;
- Clear wording – information on the identity of Quartet Community Foundation, what it does, what the funds are raised for and how they will be used, how to donate, the gift aid arrangements, what deductions are made for expenses;
- Attention to wording of appeals – such as the Surviving Winter appeal – wording should say clearly what will happen to any surplus funds and what will happen to donations if not enough funds are raised;
- Permission is sought for the use of materials such as images and logos prior to their use to ensure copyright laws are met. Taking or publishing photographs of children must have the parent or guardian's prior permission. The Foundation has copies of consent forms if required – see 'Data Protection' above;
- If fundraising is undertaken in partnership with one or more other charities or organisations, the allocation between the charities must be clearly stated to potential donors.