

Fundraising and Donations Policy

Document Owner and Author:	©Simply Third Sector Ltd
Date Drafted	August 2025
Date for Review	August 2026
Date Approved by the Board of Trustees	August 2025



L o v e d K n o w n R o o t G r o w

Contents

1. Purpose	3
2. Fundraising Principles	3
3. Methods of Fundraising	3
4. Donor Rights	4
5. Use of Donations	4
6. Handling Donations	4
7. Ethical Considerations	5
8. Third-Party Fundraising	5
9. Monitoring and Review	5
10. Involvement of Care Leavers	6
11. Training and Safeguarding	6



L o v e d K n o w n R o o t G r o w

1. Purpose

This policy outlines how Roots South West will manage fundraising and donations to ensure transparency, accountability, and compliance with legal and ethical standards, including the Charity Commission guidance and the Fundraising Regulator's Code of Fundraising Practice. It applies to trustees, staff, volunteers, and third-party fundraisers, with specific measures to protect and respect the needs of 16-17 year old care leavers, who are considered vulnerable under the Children Act (1989/2004).

2. Fundraising Principles

We are committed to:

- Honesty and integrity in all fundraising activities.
- Respecting the rights, dignity, and privacy of donors, particularly vulnerable individuals such as 16-17 year old care leavers, in line with the Fundraising Regulator's Code Section 1.4.
- Ensuring that fundraising is legal, open, and fair.
- Avoiding undue pressure or exploitation of vulnerable individuals, using trauma-informed approaches sensitive to the experiences of care leavers.
- Promoting inclusivity and accessibility in fundraising to engage care leaver communities and their supporters.

3. Methods of Fundraising

We may raise funds through:

- Public donations (online, in-person, events), prioritizing accessible methods like social media campaigns to engage young people and their communities.
- Grant applications.
- Corporate sponsorships.
- Community fundraising.
- Legacy giving, approached sensitively given the young demographic of our beneficiaries.



L o v e d K n o w n R o o t G r o w

- Crowdfunding platforms, ensuring care leaver privacy (e.g., anonymizing stories) and GDPR compliance for data collected.

All fundraising activities will comply with the Charity Commission guidance (CC20) and the Fundraising Regulator's Code of Fundraising Practice. Where care leavers participate in fundraising (e.g., as ambassadors), informed consent will be obtained, and safeguards will be in place to prevent exploitation (see Section 10).

4. Donor Rights

Donors have the right to:

- Know how their donation will be used, with age-appropriate information provided to 16-17 year olds in simplified formats (e.g., easy-read, audio) per GDPR Art. 12.
- Receive prompt acknowledgment and thanks.
- Remain anonymous if they choose.
- Withdraw consent for communications at any time.

We will never sell or share donor data with third parties, in line with the Charity's Data Protection and GDPR Policy. Vulnerable donors, such as care leavers or their families, will receive additional support (e.g., advocate involvement) to ensure understanding and consent.

5. Use of Donations

Donations will be used solely for the charitable purposes outlined in our governing documents, specifically to support services for 16-17 year old care leavers, such as education, housing support, or mental health programs. Restricted donations will be used only for the purpose specified by the donor. The Charity will transparently disclose fundraising costs (e.g., event expenses, platform fees) in donor communications, per the Fundraising Regulator's Code.

6. Handling Donations

- All donations will be recorded accurately and securely, in line with the Data Protection and GDPR Policy.



L o v e d K n o w n R o o t G r o w

- Cash donations, including those from 16-17 year olds, will be counted and banked promptly, with scrutiny to ensure no undue pressure was applied.
- Online donations will be processed through secure platforms.
- Gift Aid will be claimed where applicable and with donor consent, with clear explanations provided to vulnerable donors.

7. Ethical Considerations

We will not accept donations from sources that conflict with our values or could harm our reputation or beneficiaries, particularly 16-17 year old care leavers. This includes:

- Companies involved in exploitation, abuse, or industries harmful to youth (e.g., predatory lending).
- Individuals or entities under investigation for criminal activity.

The Fundraising Manager or Board Chair will assess donation sources, consulting care leaver representatives or safeguarding experts to ensure alignment with beneficiary interests. A clear decision-making process will be documented, including reasons for accepting or rejecting donations.

8. Third-Party Fundraising

Any third-party fundraising must be approved in writing by the Board of Trustees and comply with this policy. Third-party fundraisers will be trained in safeguarding and the needs of care leavers to prevent inappropriate approaches. Contracts will include clauses on GDPR compliance and safeguarding obligations. The Charity will monitor third-party activities to ensure compliance and protect our reputation.

9. Monitoring and Review

This policy will be reviewed annually by the Board of Trustees, incorporating feedback from care leavers and safeguarding audits to ensure fundraising practices remain appropriate. Any breaches will be investigated, with appropriate action taken, including disciplinary measures or escalation to the Fundraising Regulator if needed.

A complaints procedure is in place for donors and service users regarding fundraising activities. Complaints can be raised with the Fundraising Manager or Board Chair, with



L o v e d K n o w n R o o t G r o w

a response provided within 14 days. Unresolved complaints will be escalated to the Fundraising Regulator, per Code Section 1.6.

10. Involvement of Care Leavers

Care leavers may participate in fundraising activities (e.g., as ambassadors or event organizers) to empower them and raise awareness. Participation will be managed with the following safeguards:

- Obtaining verifiable, informed consent in age-appropriate formats (e.g., simplified language, visual aids).
- Ensuring anonymity unless explicitly agreed otherwise, protecting personal stories from public disclosure.
- Providing support (e.g., staff or advocate guidance) to prevent distress or exploitation.
- Aligning with the Charity's Safeguarding Policy and Data Protection and GDPR Policy for data use.

11. Training and Safeguarding

All staff, volunteers, and third-party fundraisers will receive mandatory training on:

- Ethical fundraising practices, per the Fundraising Regulator's Code.
- Safeguarding vulnerable young people, including 16-17 year old care leavers, under the Children Act (1989/2004).
- Trauma-informed approaches to ensure sensitive interactions.
- GDPR compliance for handling donor and participant data.

This policy integrates with the Charity's Equality and Diversity Policy and Data Protection and GDPR Policy to ensure cohesive implementation.



L o v e d K n o w n R o o t G r o w