

## **Fundraising Policy**

### **1. Policy Statement**

This policy relates to all aspects of fundraising and sets out a framework and protocol for fundraising. Fundraising activities delivered by Deafblind Scotland will comply with all relevant laws, legislation and regulations - fundraising by charities only registered in Scotland is subject to the Charities (Regulation and Administration) Scotland Act 2023. Scottish charities are regulated by an independent body. This body is called the Office of the Scottish Charity Regulator (OSCR); and the Scottish system of self-regulated fundraising through the Scottish Fundraising Standards Panel.

### **2. Background and Scope**

**Deafblind Scotland (DbS)** is a not-for-profit organisation. Our focus is to raise the ambitions and expand the lives of Deafblind people, whose lives often centre around losses - loss of sight/hearing, independence, personal freedom, status and having a socially valued role. DbS uses its charitable objectives together with registration as a charity to raise funds. Each year over £1 million is raised from sources that include small and large trusts and foundations, the New Lottery Community Fund, statutory bodies and other organisations, individual donors and legacies.

This policy describes the measures in place to ensure best practice for fundraising is adhered to within Deafblind Scotland.

This policy applies to all board members and members, sessional and permanent staff and volunteers all of whom are responsible for adhering to this policy.

### **3. Purpose**

The purpose of this policy is to detail practices adopted to ensure the charity is exposed to minimum risk, is accountable to funders and donors and meets the expectations and needs of our beneficiaries.

### **4. Elements of the Policy**

Deafblind Scotland is committed to raising the ambitions and expanding the lives of Deafblind people by improving services and quality of life for deafblind adults living in Scotland.

Donations secured for Deafblind Scotland through fundraising activities, as with all charities, consist of unrestricted (general) funds or restricted funds.

Unrestricted or general funds – these are funds that a charity has received from a donor, and which are not held for any particular charitable purpose. They can be spent as deemed fit by the trustees and as set out in Deafblind Scotland's charitable objects.

Restricted Funds are where the restriction is defined by the donor. Examples of restricted funding include beneficiary gifts, emergency appeals where money will be raised for a specific purpose, legacies donated for a specific purpose, or a grant given for a particular project. When donors give money to Deafblind Scotland in a way that specifies how that should be spent eg a grant to pay for a project – we are duty bound to spend it for that purpose.

It is important that Deafblind Scotland are transparent about how donations will be used. They should not imply in their fundraising and marketing communications that a donation will be used for a specified purpose if it will be used for general funds.

## **5. Accountability to funders**

DbS is committed to ensuring that we meet our funders' requirements, and this includes the prompt acknowledgement of funding and effective grant co-ordination and management. Thank you letters to donors will be timeously sent. Contributions from funders may be acknowledged through any or all the following Deafblind Scotland publications: Annual Report, Financial Accounts and the Website, social and digital media. Deafblind Scotland will undertake a branding agreement where large sums have been achieved and are committed to maximising the promotion of a project and the funder's contribution, usually through marketing materials, Deafblind Scotland's publications and social media. The charity's acceptance of money by means of a grant or donation effectively enters Deafblind Scotland into a form of contract with the 'funder'. The 'funder' may be an individual, a Trust or Foundation, a company, an organisation such as a Rotary Club or a statutory body such as a Local Authority.

All trusts, foundations, local/statutory authorities will be kept fully informed of all progress with their funded projects. The specified reporting requirements and guidelines of a grant will be closely followed. Grant co-ordination for grant awards could be from 1 year to up to five years. This will include effective financial management and project monitoring/evaluation which requires close liaison between the project lead, the Fundraising Manager and the Head of Finance, Resources and Membership.

When appeals for specific projects are so successful that not all money can be allocated to them, or projects do not go ahead, then any relevant parts of grants received must be returned, unless the grant maker's agreements for their grants to be used for other purposes have been received in writing.

## **6. Codes of fundraising practice**

Deafblind Scotland has adopted the Institute of Fundraising Codes of Fundraising Practice that is relevant to the association. These codes include:

- Fundraising Code of Conduct
- Fundraising from Grant Making Trusts
- Acceptance and Refusal of Donations
- Data Protection (GDPR)
- Charities Working with Businesses.

Deafblind Scotland also adheres to the Scottish Fundraising Standards. Additionally, the following practices have been adopted: -

- Nobody directly or indirectly employed by or volunteering for Deafblind Scotland shall accept commissions, bonuses or payments for fundraising activities on behalf of the organisation.
- No general solicitations shall be undertaken by telephone or door-to-door.
- Fundraising activities should not be undertaken if they may be detrimental to the good name or community standing of Deafblind Scotland.
- Financial contributions will only be accepted from companies, organisations and individuals the Board considers ethical. Fundraising activities should not be undertaken if they will expose the organisation to financial risk
- A statement estimating income and expenses will be prepared prior to the commencement of any new fundraising activity that may present a financial risk to Deafblind Scotland.
- A report on fundraising will be prepared by a representative of the fundraising team for inclusion in Deafblind Scotland's annual report.

## **7. Minimising exposure to risk**

Risk is minimised by carrying out a feasibility study and the Senior Management Team or Board of Directors' approval for large projects requiring new staffing.

## **8. Methods for Continuous Improvement and Growth**

The Fundraising plan is regularly reviewed to ensure growth and development. The Fundraising plan consists of income generation through the following activities: -

- Trusts and foundations
- Individual donors
- Collections
- Wills and Legacies
- Corporate sponsorship
- Merchandise – Christmas cards

## **9. Training and Information**

To maintain the highest standards, we will ensure that the fundraising team have membership access to the Chartered Institute of Fundraising and their Special Interest Groups. Subscriptions to relevant to funding alerts will also be in place so the most up to-date information about funding opportunities is readily available.

## **10. Equality, Diversity and Participation**

Deafblind people are actively engaged in developing our project related work through our Development Group. Within this group deafblind people work alongside staff to identify support and development needs for deafblind people and ensure communities become more inclusive and set priorities for action.

## **11. Confidentiality**

All personal information collected by Deafblind Scotland adheres to GDPR and is confidential and is not for sale or to be given away or disclosed to any third party without consent.

## **12. Financial Considerations**

Annual budgeting reviews will make appropriate provision for Deafblind Scotland to manage all existing grant contracts. Care will be taken to cost applications correctly so that projects are not jeopardised by under-funding. If Deafblind Scotland fails to comply with the terms and conditions attached to a grant and the funder withdraws all or part of the original award, the association will undertake to reach a fair agreement over the amount to be returned to the funder and return such monies.

## **13. Legal Considerations**

Where the acceptance of grant funding necessitates a formal contract, a member of the Senior Management Team or a Board Member will sign in agreement to the terms and conditions of the grant. At this point Deafblind Scotland legally undertakes to use its best endeavours to resolve any dispute which may arise under the agreement. This policy will be revised to take into account any developments or changes from reviews of the law and regulations relating to fundraising and fundraising activities.

## **14. Policy Appeals**

Any appeals relating to fundraising can be made directly via Deafblind Scotland's Complaints and Appeals Policy and Procedure.

## **15. Mechanism for Delivering Policy and Other Issues**

The mechanism for delivering policy objectives will be the Fundraising targets and timescales.

## **16. Health and Safety**

Funding applications will be written observing the necessary Health and Safety measures required by deafblind people. Where Public Liability Insurance is appropriate, e.g. where an initiative will benefit members of the public using our premises, the insurance cost will either be identified for grant funding or funded by Deafblind Scotland.

## **17. Review Period**

This policy will be subject to review and approval on an annual basis.