



**The Percy Hedley  
Foundation**

## **Fundraising Policy**

# **The Percy Hedley Foundation**

Version 1.0 September 2018

Registered Charity in England and Wales No. 515943

## Introduction

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At Percy Hedley, we are dedicated to providing outstanding care, education and support to over 1,000 disabled children, young people and adults every year in the North East.

It costs over £25m a year to run our two schools, college, specialist residential care and adult services. We receive funding from local authorities, the NHS and Department of Education, but rely heavily on fundraising and charitable donations to ensure we can continue to provide the very best environment, and every learning opportunity available, for the people we support.

This policy explains how Percy Hedley approaches fundraising, including our ethical, legal and social responsibilities. It covers fundraising activities undertaken by Percy Hedley staff, registered volunteers, parents and families, individuals, companies and members of the public.

## Definitions

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**Percy Hedley:** The abbreviated version of The Percy Hedley Foundation, our registered charity name.

**Service user:** Anyone who benefits from our services, for example students in our schools and college, people attending our Able 2 day services, and people living in our residential homes.

**Fundraising:** The seeking of financial support for Percy Hedley through a variety of means, eg holding a raffle, a large scale fundraising event or seeking donations from a local trust.

**Supporter:** Someone who organises their own fundraising activity in aid of a charity; gives their time to raise money or awareness of a charity, eg takes part in an organised street collection; or takes part in one of the charity's own, or third party fundraising event to raise money, eg the Percy Hedley Ball or the Great North Run.

Someone who makes a donation to a charity in a one off or regular basis, without actively supporting fundraising events and activities.

**Volunteer:** Someone who volunteers their time at charity events and activities, eg a volunteering at the Percy Hedley Ball or collecting donations from the public during a street collection.

**GDPR:** The General Data Protection Regulation (EU) 2016/679 is a regulation in EU law on data protection and protection and privacy for all individuals with the European Union and the European Economic Area. GDPR came into force in May 2018.

## Our promise to you

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At Percy Hedley we are committed to ensuring our fundraising activities are legal, honest, transparent and respectful, and that supporters who fundraise in aid of Percy Hedley are valued, informed and supported.

As such we promise that:

- As a charity registered with the Charity Commission (Reg No. 515943), all of our fundraising activities will comply with the law and all relevant regulations.
- Our fundraising activities will be of the highest standards and always in the best interests of Percy Hedley and our charitable aims.
- We will never engage in fundraising which is an unreasonable intrusion on a person's privacy or is unreasonably persistent.
- We will engage with and guide our supporters to ensure their fundraising is successful, and compliant with fundraising regulations.
- We will communicate with our supporters and volunteers in the way that they request, and always in line with GDPR regulations.
- We will thank and acknowledge our supporters in a timely and appropriate manner.
- We will be clear about how donations we receive will be used.
- We will listen, always respond, and where appropriate act promptly on all feedback and complaints we receive.
- We will only use images of our supporters, and service users, to publicise our work when we have received the appropriate permissions.
- We will bank and log all donations promptly and transparently in line with relevant regulations, and we will publish our annual voluntary income in our Annual Report each year.
- When working with third party suppliers we will ensure they are aware of our fundraising policy and the Code of Fundraising Practice to which we adhere.

## Responsible Fundraising

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Percy Hedley undertakes a wide range of fundraising activities and events throughout the year. All such events and activities are rigorously planned both in terms of the activities themselves, and the potential income to be generated for the charity. All our fundraising is undertaken in line with legal and regulatory requirements, and will always be undertaken with the best interests of the charity and its objectives in mind.

We will offer support and guidance to our supporters who fundraise in aid of Percy Hedley to ensure they are aware of the Code of Fundraising Practice and any legislation that is relevant to their activity. We will also provide letters of authorisation, branded materials and use of our logo as appropriate.

## Legal and regulatory requirements

Percy Hedley is registered with the Fundraising Regulator, and this policy, and our related procedures, takes into account the following legal requirements and regulatory codes, standards and guidance that all fundraising by charities and their supporters must adhere to:

- [the Charities Act 2016](#)
- [the Fundraising Regulator Code of Fundraising Practice](#)
- [the General Data Protection Regulation 2018 \(GDPR\)](#)
- [the Gambling Act 2005](#)
- [the Safeguarding Vulnerable Groups Act 2006](#)
- [the Direct Marketing Association Code](#)

## Types of fundraising we do

Percy Hedley undertakes a wide range of fundraising activities to raise funds for the charity, listed below. All of these activities follow the Fundraising Regulator's [Code of Fundraising Practice](#):

- engaging with supporters about ways they can donate or get involved with fundraising via regular email and post communications they have opted in to receiving.
- holding our own fundraising events, for example our annual Percy Hedley Ball.
- purchasing places in third party events, for example the Great North Run, to sell on to supporters and seek sponsorship for.
- supporters holding their own events in aid of Percy Hedley, for example holding a pub quiz or their own sponsored walk.
- various community activities, for example holding street collections and bag packs, and placing collection tins with local businesses.
- working with local businesses who wish to support us, either by staff fundraising, making a corporate donation, sponsoring one of our events or activities, or taking part in one of our corporate campaigns.
- receiving one off donations from individuals, groups and organisations.
- receiving regular gifts via standing order or direct debit.
- seeking grants and donations from charitable trusts and foundations.
- engaging in and promoting cause related marketing, for example Smile Amazon.
- having our own fundraising lottery, run and operated by [Unity Lottery](#).

At present, we do not undertake the following fundraising activities, although we may in the future, at which point this document will be updated:

- **Telemarketing** - making unsolicited phone calls to current or potential supporters to ask for regular donations, either by Percy Hedley staff or a professional third party provider on behalf of Percy Hedley.
- **Face to face fundraising** – seeking sign up to regular giving in a public place, usually a high street or supermarket, either by Percy Hedley staff or a professional third party provider on behalf of Percy Hedley *NB. This does not include street collections where volunteers receive cash donations from members of the public with an appropriate licence in place.*
- **Door to door fundraising** – unsolicited visits to a home to ask for regular donations or a contribution to an event or raffle, either by Percy Hedley staff or a professional third party provider on behalf of Percy Hedley *NB. On occasion supporters who are holding their own fundraising activity in aid of Percy Hedley may call on houses in their neighbourhood to ask for support. If they do, they should have a letter of authorisation from Percy Hedley with them, which outlines the details of their event and what support would be appreciated, and they should not put people under any obligation to support in any way.*

If you have any concerns regarding any of our fundraising activities or those undertaken by our supporters, or if you are not sure if fundraising activity you have seen or been told about is legitimate, please contact the Fundraising Team on 0191 212 7878 or email [fundraising@percyhedley.org.uk](mailto:fundraising@percyhedley.org.uk) to discuss further.

## How we use your donation

Percy Hedley provides a wide range of services to children, young people and adults across several settings in the North East, and we encourage our supporters to give financial support as general, unrestricted funds, so donations can be used where and when they are needed the most.

We understand that some supporters may want their donation to be restricted to a specific service, or area of our work, and we will honour any such request providing that the service/work is highlighted by the Percy Hedley Board of Trustees and Executive Team as a fundraising priority at the start of the relevant financial year.

On occasion a supporter may want their donation to be used to purchase a specific item or start a new activity at Percy Hedley. We will work with the supporter and our expert team to determine if we are able to accommodate their request. Depending on the size and nature of the donation, and the proposed use, a decision may be made by the Percy Hedley Board of Trustees and Executive Team that we cannot accommodate a particular request. We will then work with the supporter to look at alternative ways their donation could be used, or return or decline the donation if no alternative can be found.

On occasion we will ask our supporters to fund specific projects, for example a new piece of equipment or upgrades/additions to our premises. We will use any donations raised in this way for the agreed purpose, and should excess funds be collected, we will seek agreement from supporters to transfer the gift to another project, or to our general funds. Should insufficient funds be raised for a particular project, or should the need for change, we will clearly state that in any such event, money raised will go towards our general funds.

## Accepting, refusing and returning donations

At Percy Hedley, we have a legal and ethical obligation to ensure that we do not accept or request any donations that could bring our reputation into disrepute, or if the activities of the donor, or the means in which the money being donated has been generated, are in direct conflict with our own charitable aims.

As such, we will carry out due diligence, as laid out in the Charity Commission's ['Know Your Donor'](#) and the Institute of Fundraising's [Acceptance, Refusal and Return: A practical guide to dealing with donations](#) in respect of any significant donations we receive, or make a request for. We will make all reasonable and appropriate attempts to identify organisations, individuals, trusts and foundations who wish to make, or have already made, large donations to Percy Hedley.

The ultimate decision whether to request, accept, refuse, or return a donation will sit with the Percy Hedley Board of Trustees, who will make a final judgement following the appropriate research outlined above, and in the best interests of the charity.

## Financial management

As a charity, Percy Hedley is governed by the Charity Commission and adheres to its [reporting and accounting framework](#).

With regard to fundraising, we will always follow best practice and guidelines laid out in the [Code of Fundraising Practice – Handling Donations](#) regarding donations we receive, including:

- Banking all cash/cheque donations received within two working days of receipt.
- Processing credit/debit card payments in line with the [Payment Card Industry Data Security Standard \(PCI DSS\)](#).
- Recording all payments received.
- Thanking supporters for their donation within five working days of receipt.
- Logging all received Gift Aid declarations and seeking Gift Aid declarations from eligible donors and make annual Gift Aid claims to HM Customs and Excise. Please note, when thanking donors, the amount thanked for will be the actual donation/sponsorship amount and will not include any Gift Aid contribution.

## Your personal information

Percy Hedley has a comprehensive [Privacy Notice](#) which explains how we collect, use, store, retain and share your personal information.

We respect the privacy of all our supporters and volunteers, and will only ever contact them in the way they have requested. We have simple-to-use contact preferences for people to manage how we contact them, or to stop any further communications, and any changes made will be acted on promptly and effectively and in accordance with data protection legislation, including the General Data Protection Regulation (GDPR), and the Data Protection Act 2018.

We will never pass on or sell any personal information we hold to a third party for marketing purposes.

## Our Supporters and Volunteers

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People volunteer their time to support our fundraising in many different ways. Volunteers support us on both a regular and ad hoc basis. Examples of regular volunteering could include helping with office and promotional work, or collecting and banking donations from static collection tins. Ad hoc opportunities could include helping out at the Great North Run finish line, collecting donations as part of an organised street collection or supermarket bag back.

We will ensure all of our volunteers have appropriate training and induction to their role, and for regular/long term volunteer roles, we will require two satisfactory references and appropriate external checks, for example a DBS check for anyone working with, or in the same building as, our service users. For adhoc volunteers, we will seek relevant information, for example their contact details and emergency contact information, to ensure we can support them during their volunteering activity.

We will always ensure our volunteers are thanked and acknowledged for their support and commitment to Percy Hedley.

## Working with service users and their families

We very much appreciate the great support we receive from our service users and their families in terms of their own fundraising, and also encouraging their friends, families and networks to raise money for Percy Hedley.

We will always listen, acknowledge and encourage suggestions and ideas from our families and service users for future fundraising activities in line with this policy.

## Working with vulnerable supporters

We define a vulnerable supporter as someone who finds it difficult to make an informed decision about the choices offered to them. This could apply to one of our service users or a member of the public, and covers a wide range of situations, both permanent and temporary. Examples include autism, neurological conditions, hearing loss, dementia, bereavement or difficulty understanding the language used.

We will always consider each situation, and should there be any concern regarding the capacity of a supporter to make an informed decision about making a donation to Percy Hedley, or taking part in one of our fundraising events, we will follow the guidance contained within the Institute of Fundraising's ['Treating Donors Fairly'](#). This applies to any donations that are proposed which may not be accepted, or that have already been made, which may be returned.

If a situation arises regarding one of our service users, in addition to following the above guidance, we will also work closely with the relevant Percy Hedley staff to ensure the service user is fully supported.

## Working with children

Percy Hedley very much values the fundraising contributions children can make to a charity, which includes children who are supported by our services and those from further afield. Taking part in school led activities or joining in a third party event such as the Junior Great North Run for example, can raise children's awareness of the value of supporting other people, build confidence and develop new skills.

We will always encourage children to fundraise in a way that is appropriate to them, and in line with relevant regulations, and that adhere to the relevant age limits in various activities, for example street collections require volunteers to be over 14 and accompanied by an adult.

In line with the Fundraising Regulator's [Code of Fundraising Practice](#), we will only record information about children under the age of 13 who participate in fundraising events and activities for us when we have permission from their parents/carers, and will not use that information for marketing purposes. When asking people to sign up to receive our marketing emails we will ask them to confirm they are over 13 and have parental permission before they sign up.

We will never ask children under 18 to fundraise or volunteer at an event organised by ourselves or by a third party that involves the sale or consumption of alcohol, for example the Percy Hedley Ball.

When working with schools and colleges, including our own, we will follow the Institute of Fundraising's [Fundraising In Schools Guidance](#) to ensure best practice.

Potential and existing supporters often visit our schools/college to see how their donations are making a difference. We will ensure that the relevant support staff are aware of, and involved in such visits to ensure children using our services are protected. All visitors will be accompanied by a DBS checked staff member at all times.

## Working with third party suppliers

As a large organisation, Percy Hedley engages many suppliers and contractors, for example food/catering suppliers to our schools, financial advisors or gas/electrical maintenance firms.

Many of the suppliers we work with take an active interest in supporting Percy Hedley from a fundraising perspective, for example taking a table at our annual Percy Hedley Ball. We are very grateful for such support, and we openly welcome fundraising and corporate sponsorship opportunities outside of normal supply, but there will never be an obligation or expectation from us to do so.

As per our contractual terms and conditions with suppliers, any fundraising or sponsorship we receive from suppliers will be deemed as a separate transaction from the purchase of goods or services. We will accept discounted rates as part of a commercial negotiation if the supplier wishes to make a donation to Percy Hedley in this way, but this must be stated in writing.

We very much appreciate the charitable support our suppliers and contractors give Percy Hedley. However, in line with relevant charity regulations, any donation received does not guarantee future commercial contracts, or make a commercial organisation a preferred supplier to the charity.

## Making a complaint

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Percy Hedley is committed to delivering a high standard of service to everyone who supports our fundraising, and we welcome all comments and feedback about the way we work, and will endeavour to learn from them, and improve our activities as a result.

We adhere to the Fundraising Regulator's [Complaints Handling Guidance for Charities](#), which classes a complaint as "an expression of dissatisfaction, however made, about actions taken, or lack of action."

If you have a complaint or comment about our fundraising work please contact Suzanne McKenna, Head of Fundraising in any of the following ways:

Email:

[s.mckenna@percyhedley.org.uk](mailto:s.mckenna@percyhedley.org.uk)

Telephone:

0191 212 7878 or 07712 676 107

By post:

Suzanne McKenna  
Head of Fundraising  
The Percy Hedley Foundation  
Tankerville Terrace  
Newcastle upon Tyne  
NE2 3BB

We will acknowledge receipt of your complaint within two working days of receipt, and following the relevant investigations, provide an initial response to your feedback within 15 working days of receipt. This response will address the issue/s raised and give clear, evidence based reasons for our response. Our response could include an apology, an explanation, and acknowledgement that the situation could have been handled differently or an assurance that the incident will not reoccur. We hope to resolve all complaints within this timeframe, but if we need to conduct a more in-depth investigation, we will advise you of this and give a full response within 20 days of receipt of the initial complaint.

If you are not happy with the response you receive, you can escalate your concerns to our Chief Executive, at Percy Hedley's head office:

The Percy Hedley Foundation  
Hampeth Lodge  
Station Road  
Forest Hall  
Newcastle upon Tyne  
NE12 8YY

If the issue/s you have raised are not resolved to your satisfaction by Percy Hedley, you can ask the Fundraising Regulator to consider it by contacting them at [Make a complaint | Fundraising Regulator](#) or calling 0300 999 3407.

This information sits alongside our wider [Percy Hedley Compliments, Comments and Complaints Policy](#) which can be found at our website [www.percyhedley.org.uk](http://www.percyhedley.org.uk)

## Management of this policy

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This policy is a public document designed for all members of the public, Percy Hedley staff, suppliers, volunteers and supporters, and is available via the Percy Hedley website, [www.percyhedley.org.uk](http://www.percyhedley.org.uk) and via email or post on request.

The policy will be reviewed every six months by the Head of Fundraising to ensure that all the information included remains correct to the best of our knowledge, and links to external organisation are still valid.

Next review date: March 2019

## Get Involved

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If you would like to share any comments about this policy, or would like to find out more about fundraising for Percy Hedley, we would be delighted to hear from you!

Email:

[fundraising@percyhedley.org.uk](mailto:fundraising@percyhedley.org.uk)

Telephone:

0191 212 7878

Address:

Fundraising Team  
The Percy Hedley Foundation  
Tankerville Terrace  
Newcastle upon Tyne  
NE2 3BB

Website:

[www.percyhedley.org.uk](http://www.percyhedley.org.uk)

Facebook:

<https://www.facebook.com/percy.hedley>

Twitter:

[@percyhedley](https://twitter.com/percyhedley)

