



# Bloxham School

## Bloxham School – Donor Charter

Philanthropy has long been part of the Bloxham story. Our bursary and hardship funds, along with much of our campus, owe a great deal to the generosity of our well-wishers. So much has been made possible by the generosity of Old Bloxhamists, parents, grant-making trusts and others whose support has ensured that the spirit of Bloxham lives on. We are deeply grateful to them all.

We welcome gifts from individuals, organisations and trusts that will help us to achieve the School's strategic goals and will align with our values, ethics and principles. In return, our commitment to value, respect and protect our donors is outlined in this donor charter. Thank you for your support; it is deeply appreciated.

### The Rights of our Donors

1. All fundraising solicitations, by or on behalf of, Bloxham School, will disclose the School's name, charity number, and clearly state the purpose for which the funds are requested. Printed or written solicitations (however transmitted) will also include its charity number, address or other contact information.
2. Donors and prospective donors are entitled to the following, promptly, upon request:
  - The most recent annual report and financial statements;
  - Confirmation of the charitable status of Bloxham School;
  - A copy of these guidelines (The Bloxham School Donor Charter).
3. Donors and prospective donors are entitled to know, upon request, whether an individual soliciting funds on behalf of the School is a volunteer, an employee, or a professional fundraiser.
4. Donors are encouraged to seek independent advice about the potential effect of a donation on the donor's financial position, tax liabilities, or relationship with other family members. The School cannot give advice on these matters.
5. As per the School's [Development Privacy Policy](#), the privacy of donors and prospective donors, and requests to remain anonymous, will be respected. The School will respect the confidential nature of donor records that it maintains, and they will be held and processed in line with the Data Protection Act. Donors have the right to see their own donor record, and to challenge its accuracy.



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6. Donors and prospective donors will be treated with respect. Every effort will be made to honour their requests to:
  - Limit the frequency of solicitations;
  - Specify the manner in which they wish to be contacted, and particularly any means by which they do not wish to receive fundraising communications;
  - Receive information or material concerning the School.

The School is committed to maintaining the highest possible standards in our fundraising. We are registered with the Fundraising Regulator, follow the Code of Fundraising Practice and regularly review our practices to ensure that they are legal, open, honest and respectful. The School is a member of the Institute of Development Professionals in Education (IDPE).

7. Donors and prospective donors have the right to refuse or withdraw consent to be contacted for fundraising purposes at any time.
8. The School will respond promptly to a complaint by a donor or prospective donor about any matter that relates to the School's fundraising activities. The School's Complaints Policy can be found [here](#).
9. Donors accept that the management and governance of programmes and/or activities funded through philanthropy rests solely with the School. Donors will, however, be provided with appropriate and commensurate opportunities for continuing engagement with the programmes/activities that they have funded/are funding.

## Our Commitment to our Donors

1. All communications made to potential donors concerning a project will be honest, truthful, and comply with the law. They will:
  - Accurately describe the School's activities and the intended use of donated funds;
  - Respect the dignity and privacy of those who benefit from the School's activities. Permission will be obtained before any individual is featured or identified in any promotional material.
2. The Donor's Rights (both under this Charter and under the law generally) will be respected.
3. Information held by the School about donors will be managed in accordance with the School's [Development Privacy Policy](#).



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4. The School's fundraising policy ensures that no-one will receive less favourable treatment due to protected characteristics.
5. Volunteers, employees and professional fundraisers who solicit or receive funds on behalf of the School shall:

Adhere to the provisions of this code;

- Act with fairness, integrity, and in accordance with all applicable laws;
- Adhere to the provisions of applicable professional codes of ethics, standards of practice, etc. as outlined by the [UK Fundraising Regulator](#)
- Cease solicitation of a prospective donor who identifies solicitation as harassment or undue pressure, and notify the Head.

6. Paid fundraisers, whether staff or consultants, will be compensated by a salary, retainer or fee, and will not be paid finders' fees, commissions or other payments based on either the number of gifts received or the value of funds raised.
7. The School will not sell either its donor or alumni lists. Lists may be made available (securely and confidentially) to professional fundraisers contracted by the School solely for the purpose of fundraising activities on behalf of the School.
8. The Board of Governors will be informed at least annually of the number, type and disposition of complaints received from donors or prospective donors about matters that are addressed in this code.
9. All donations will be used to support the objectives of the School.
10. The School will usually, when seeking donations for a particular project, explain what will happen to funds that are raised if it subsequently becomes impossible for the project to proceed, or if more funds are received than are actually required. In most cases, the School will have discretion to decide how such funds are to be applied but, where appropriate and practicable, the School will consult donors before making that decision. If a donation is received on terms that impose a strict requirement for it to be used for a particular purpose within the School's charitable objectives, that requirement will be respected. The School may only change the purpose for which such gifts are used in limited circumstances set out in the Charities Act.
11. The financial affairs of Bloxham School will be conducted in a responsible manner, consistent with the ethical obligations of stewardship and the legal requirements of national regulators.



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12. Annual financial reports will be factual and accurate in all material respects and will be prepared in accordance with generally accepted accounting principles and standards.
13. The cost effectiveness of the School's fundraising programme will be reviewed regularly by the Development Board / Board of Governors.
14. All donations will be acknowledged promptly. They will be recognized and publicized by agreement with the donor (respecting anonymity where requested).

## Bloxham School - Guidelines for the Acceptance of Gifts and Donations

1. It is agreed that the basis on which Bloxham School will actively seek funding is:
  - That the full cost of the project has been estimated;
  - That the project is approved by the Board of Governors and Senior Leadership Team as being strategically important in significantly enhancing the pupil experience, or widening access to the School;
  - That the School has assessed any additional costs, such as increased running costs, later arising as a result of any programme or activity funded through philanthropy and is confident that these costs can be met by the School on an ongoing basis without detriment to the pupil experience or the quality of education offered by the School.
2. The School will fulfil its legal obligation to exercise due diligence (as outlined in this charter) when accepting donations (particularly for gifts greater than £500,000).
3. The School may refuse a donation if the gift, or the associated terms, would:
  - Be counter to the objectives or strategic aims of the School;
  - Require action that is illegal or unethical;
  - Seriously damage the reputation of the School;
  - Create unacceptable conflicts of interest;
  - Harm the School's relationship with other benefactors, current or prospective pupils and their families, or any other organisation or individual where such harm could be significantly detrimental to the School's ability to achieve its aims.
4. The School will review gifts from parents (both current and prospective) to ensure that they do not have any inappropriate influence on the School's decision-making processes.



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5. The School will not accept an 'anonymous' gift without at least the Head and one Governor being aware of the source of the donation.
6. Gifts cannot be accepted in cash, and should be made electronically, by cheque, or by credit or debit card.
7. Decision making:
  - All philanthropic gifts should be channeled through the Development Office to ensure adherence to policy.
  - Decisions that do not fall within the due diligence process will be taken by the canvasser concerned, and in the case of a decision to decline the donor, the Head and the Development Board / Board of Governors will be informed.
  - Where the due diligence process has been undertaken and no issues have been identified the Head and Development Board will take the decision to accept and s/he will advise the Board of Governors accordingly.
  - If any doubt exists then the Head will be consulted and s/he may then refer the decision to the Development Board / Board of Governors for final decision. The donor will be informed.
  - Previous decisions regarding the acceptance of particular gifts of more than £500,000, taken in good faith, may be reconsidered in the light of new events or information.
8. Legacy Gifts  
Irrespective of the time when the legacy pledge was made, legacy gifts will be accepted under the terms of the Donor Charter in existence at the time of receipt.