

## Fundraising Policy 2021

The Link Academy Trust is a company limited by guarantee and an exempt charity, regulated by the Education & Skills Funding Agency (ESFA). All Members of the Board of Trustees are Directors of the company as well as Trustees of the exempt charity; the term 'Trustee' used in this policy also means Director. This policy applies to all academies within the Link Academy Trust.

1. This policy is applicable to all employees of the Link Academy Trust (the Trust) and sets out the specific arrangements which the Trust expects to be in place to deliver the policy's aims effectively. The Trust has an important part to play as part of the implementation of the policy. The policy will help to ensure the Trust maintains high standards and an anti-fraud culture, ensures that the Trust's policy reflects current good practice and remains fit for purpose, and provides a clear message as to its attitude towards fundraising.

### 2. Fundraising Principles

- The Trust requires all employees and volunteers, including donors and members, to adhere to ethical practices when soliciting potential donors for the benefit of the Trust.
- The Trust staff are expected to have the highest standards of ethical conduct in fundraising.
- The Trust complies with all current education and charitable rules regarding solicitation and collection of charitable contributions, whether specifically addressed in these **Fundraising Principles, Policies and Procedures** or not, as well as all future revisions to those rules.

### 3. Gift Acceptance General Policy

The Trust will accept all donations of cash, cash equivalents, marketable securities, membership, sponsorship and certain gifts-in-kind. All other donations in whatever form are subject to approval in advance of acceptance by the Trust's Board of Trustees.

### 4. Criteria for Acceptance

The Trust must determine if a gift meets the criteria for acceptance. In general, a charitable contribution is a gift that has three essential elements: donative intent, delivery and acceptance. The following are the general guidelines that the Trust must consider when accepting a gift:

- The gift substantially benefits the academies within the Trust.
- The gift is complete, voluntary and unconditional. In addition, there should not be any substantial benefit transferred to the donor in return for the gift.
- The gift is free of substantial restrictions on the use of donated items.
- Any additional capital or revenue expenditure through acceptance of the gift is within the budget

### 5. Contributions Not Accepted

In general, a contribution will not be accepted if it is likely to cause, through association, embarrassment or harm to the good name of the academies and/or Trust; for example, a

contribution from the alcohol industry. If there is any doubt, then advice should be sought, in the first instance, from the Trust Business Manager (TBM).

## **6. Procedures**

If in the event of a question arising as to whether a potential donation meets the criteria listed above, the TBM will gather information and documentation related to the contribution and present it for consideration to the Board of Trustees. The Board will determine if the academy and/or Trust will accept the gift.

When a contribution is pledged, delivery and acceptance do not occur until payments on the pledge are received. Other procedures may apply depending on the type of gift.

This policy is linked with the Link Academy Trust Gifts & Hospitality Policy

This Policy is reviewed by the Finance and General Purposes Committee on an annual cycle and must be approved by the Board of Trustees.

**Approved by the Board of Trustees: 11 October 2021**  
**Next Review: October 2022**