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**Fundraising Policy**

**August 2025**

**Document Profile**

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**Version Control/Changes Made**

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| --- | --- | --- | --- |
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| 6th August 2025 | 1 | New policy | Mo de Gruchy |
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This policy has been adapted for local use from the Age UK Sutton Fundraising Policy (2018).

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# INTRODUCTION

## Rationale

At Family Nursing & Home Care (FNHC) our fundraising promise to the general public and our existing supporters is that our fundraising, in all its forms, is legal, open, honest and respectful.

Charitable Funds consist of but are not exclusively limited to:

* Friends of FNHC
* Gifts left in a will for the benefit of FNHC (or a certain part of FNHC) such as money, property, assets etc.
* Money raised through fundraising events
* Money donated as through fundraising appeals
* Corporate sponsorship
* Charitable foundation funds
* Tangible personal property (gifts-in-kind)
* Individual Fundraising
* In Memoriam Donations
* Draw Club
* Retail donations, such as Easy Fundraising, Co-op FNHC Share number

Fundraising activities will be carried out in line with the UK Code of Fundraising Practice (2019) and guidance from the Jersey Charity Commission.

All fundraising by means of lotteries, e.g. raffles etc. will comply with the Jersey Gambling Commission Code of Conduct for Social and Charitable Gambling (2025a) and Advice Note (2025b).

## Scope

This policy applies to any member of FNHC staff who is involved in fundraising activity. The administration of Grants and Legacies are covered by separate Standard Operating Procedures.

## Role and Responsibilities

**Committee**

The Committee holds ultimate responsibility for fundraising compliance. They delegate operational management of fundraising to the CEO and Senior Leadership Team.

**Chief Executive Officer (CEO) and Senior Leadership Team (SLT)**

The CEO and Senior Leadership Team have overall accountability for the day to day management of fundraising within FNHC.

**Head of Fundraising**

The Head of Fundraising is responsible for:

* ensuring FNHC is compliant with the requirements of the Jersey Charity Commission
* developing an integrated fundraising strategy
* successfully delivering the required levels of fundraising
* expanding and developing fundraising capability and increasing the number of FNHC supporters and regular donors
* building the profile of FNHC across the island
* building partnerships where appropriate with other third sector organisations and healthcare providers
* organising, delivering and managing fundraising events

**Fundraising Support Officer**

The Fundraising Support Officer is responsible for:

* providing administrative support and fundraising assistance to the Head of Fundraising
* supporting the implementation of a range of fundraising strategies to raise funds from individuals, community groups, events, companies and grant-making sources
* being a point of contact for all fundraising/donations enquires to the charity
* being the main administrator/user for the Donorflex system, which is FNHC’s Customer Relationship Management (CRM) system

# POLICY

## Key Principles

FNHC will be honest about how donations are used to fulfil the aims of the organisation, open about the methods used to raise funds and who we work with, respectful to the wishes, preferences, personal information and circumstances of the people we interact with and will take all steps necessary to comply with the law and sector fundraising practice standards.

Nobody directly or indirectly employed by or volunteering for FNHC shall accept commissions or bonuses for fundraising activities on behalf of FNHC.

FNHC will always be respectful. This means being mindful of and sensitive to any particular need that a donor may have. It also means striving to respect the wishes and preferences of the donor. FNHC will treat donors fairly and will not discriminate against any group or individual.

FNHC will respond appropriately to the individual needs of our donors and will consider all requests to adapt our approach (tone, language, communication technique) to suit the needs and requirements of the donor.

If FNHC fundraisers, those employed by FNHC or fundraising on behalf of FNHC, identify signs of donor vulnerability, they will respond appropriately and according to the principles of being legal, open, honest and respectful.

Staff must take all necessary steps to understand if the donor is able to make an informed decision about donating to FNHC and respond appropriately. If a donor is deemed unable to make an informed decision the member of staff must not accept the donation.

Before fundraising activity can be initiated approval must be sought from the Senior Leadership Team.

## Social Responsibility in Gambling

The Jersey Gambling Commission regulates gambling in the public interest. Its guiding principles are that:

* Gambling should be regulated in accordance with generally accepted international standards to prevent fraud and money laundering, and should not be permitted to be a source of crime associated with crime and disorder, or being used to support crime
* Gambling should be verifiably fair to consumers of those services ensuring that gambling is conducted in a fair and open manner
* Gambling should always be conducted responsibly and with safeguards necessary to protect children and vulnerable people

FNHC is committed to ensuring that any fundraising gambling activities are operated in a secure, fair and socially responsible way and endorse responsible gambling amongst its staff, supporters and the public. FNHC will ensure that relevant staff complete gambling awareness training via its online learning platform, on induction and/or on an annual update basis.

## Donor Research

Research on donors and prospects is an acceptable and intrinsic part of fundraising. Data surrounding individuals and companies who wish to be associated with Charitable Funds will be stored in a confidential file. It must be stressed that any approaches undertaken by FNHC will be handled in a sensitive and appropriate manner and comply with current data protection legislation. Donor and prospect research activity is limited to the Head of Fundraising and Senior Leadership Team, with these members of staff fully briefed on the application of local data protection legislation to this activity.

## Database of Donors

The Head of Fundraising will coordinate the soliciting of funds from individuals, foundations, businesses, corporations and organisations to avoid an excessive number of solicitations in the name of FNHC.

The Head of Fundraising shall be responsible for the development, maintenance and compliance of a record of donors and prospects.

FNHC shall seek, from managers and staff, details of donors which may be used to solicit support.

Data will be held in accordance with the Data Protection (Jersey) Law 2018 and FNHC’s Records Retention Schedule.

FNHC will respect the privacy and contact preferences of all donors and will respond promptly to requests to amend contact details, including the removal of contact details from the fundraising database.

## Donor Recognition

A donor to FNHC is entitled to appreciation for their donation. Each donation will be acknowledged in writing by a member of the Fundraising Team and/or by the CEO.

With their permission, sponsors’ names may be published in the FNHC’s Annual/Impact Reports, newsletter, website and/or social media.

## Acceptance and refusal of donations or gifts

In deciding whether to accept or decline a donation or gift FNHC will consider the charity's best overall interest and will not accept donations from donors whose activities appear to be in direct conflict with our charitable aims and objectives.

Additionally, FNHC will not work with companies or individuals who participate in activities which:

* could cause detriment to the charity’s reputation
* will disproportionately decrease the amount of donations to further the work of the charity
* undermine our vision and values
* are associated with unsuitable products, corporate or individual e.g. arms dealings and tobacco
* are from individuals, groups or organisations which are known to take advantage of older or vulnerable people
* are personal gifts to FNHC staff members, which should be discouraged at all times, or are from unknown sources of funding

FNHC will take reasonable steps to determine the ultimate source of funding for each gift and satisfy itself that the funds do not derive, directly or indirectly, from activity that:

* was or is illegal
* may potentially harm the relationships with other donors, service users, stakeholders or volunteers
* may expose FNHC to undue adverse publicity or reputational risk
* may require unacceptable expenditure or additional charity resources

If a donation is received which may not be acceptable under the terms of this policy the Head of Fundraising will alert the CEO at the earliest opportunity. This will be researched further and the matter will be referred to the Committee with the necessary information regarding the donation.

## Donation sharing with other organisations

From time to time, FNHC may receive a legacy, donation or funding which is intended for use by more than one charity. Where the funding has been solicited e.g. via a grant application or proposal, clear documentation regarding the proposal, how funds will be used, and how the charities will account individually and collectively for expenditure, must be in place prior to agreeing a final receipt of funds. FNHC is committed to providing reporting around donation sharing within a reasonable framework.

## Reports to donors/sponsors

It shall be the responsibility of the relevant Operational/Service Lead to provide official reports on the use of donations, if requested by outside agencies or individual donors.

## Use of Volunteers for Fundraising Activities

**FNHC Employees**

Whilst volunteering is a matter of personal choice, it is expected that staff will endeavour to support fundraising activities organized by FNHC by volunteering their time. Approval will be required by the relevant line manager prior to undertaking any volunteering activity in support of FNHC.

Staff will be eligible to claim Time Off In Lieu (TOIL) for volunteering their time in support of FNHC outside of their usual working hours. TOIL will be taken back as agreed by their line manager, subject to operational requirements.

The safety and wellbeing of staff volunteering for FNHC fundraising events will be managed by the nominated Event Lead.

Individual staff may also wish to organize their own activities to raise funds for FNHC. In this instance, individuals will undertake these activities in their own time, at their own risk and will not be eligible to claim TOIL.

**Non FNHC Employees**

The management and support of volunteers who are not FNHC employees is covered in the FNHC Volunteer Policy.

## Publicity

All fundraising publicity will clearly state how fundraising will benefit FNHC and where further information on the work of FNHC can be found.

## Complaints

FNHC will respond to any complaints related to FNHC fundraising activities in a timely, respectful, open and honest way and in line with FNHC's Complaints Policy.

# PROCEDURE

See Standard Operating Procedures for Fundraising Activities.

# MONITORING COMPLIANCE

Compliance with this policy will be overseen and monitored using internal audit and review of relevant accounts and processes.

# CONSULTATION PROCESS

|  |  |  |
| --- | --- | --- |
| **Name** | **Title** | **Date** |
| Elaine Walsh  | Director of Finance | 20.08.2024 |
| Kalina Syvret | Head of Fundraising | 20.08.2024 |
| Flora Mulhall-Wood | Fundraising Data Admin Assistant | 20.08.2024 |
| Richard Sims | Grants and Legacies Officer | 20.08.2024 |
| Rosemarie Finley | CEO | 29.05.2025 |
| Claire White | Director of Governance and Care | 29.05.2025 |

# EQUALITY IMPACT STATEMENT

Family Nursing & Home Care is committed to ensuring that, as far as is reasonably practicable, the way services are provided to the public and the way staff are treated reflects their individual needs and does not discriminate against individuals or groups on any grounds.

This policy document forms part of a commitment to create a positive culture of respect for all individuals including staff, patients, their families and carers as well as community partners. The intention is to identify, remove or minimise discriminatory practice in the areas of race, disability, gender, sexual orientation, age and ‘religion, belief, faith and spirituality’ as well as to promote positive practice and value the diversity of all individuals and communities.

The Family Nursing & Home Care values underpin everything done in the name of the organisation. They are manifested in the behaviours employees display. The organisation is committed to promoting a culture founded on these values.

**Always:**

* Putting patients first
* Keeping people safe
* Have courage and commitment to do the right thing
* Be accountable, take responsibility and own your actions
* Listen actively
* Check for understanding when you communicate
* Be respectful and treat people with dignity
* Work as a team

This policy should be read and implemented with the Organisational Values in mind at all times. See overleaf for the Equality Impact Assessment for this policy.

## EQUALITY IMPACT SCREENING TOOL

|  |
| --- |
| **Stage 1 - Screening**  |
| Title of Procedural Document: Fundraising Policy |
| Date of Assessment | May 2025 | Responsible Department | Corporate |
| Completed by | Mo de Gruchy | Job Title | Communications Adviser |
| **Does the policy/function affect one group less or more favourably than another on the basis of**: |
|  | **Yes/No** | **Comments** |
| Age | No |  |
| Disability*(Learning disability; physical disability; sensory impairment and/or mental health problems e.g. dementia)* | No |  |
| Ethnic Origin *(including hard to reach groups)* | No |  |
| Gender reassignment | No |  |
| Pregnancy or Maternity | No |  |
| Race | No |  |
| Sex | No |  |
| Religion and Belief | No |  |
| Sexual Orientation | No |  |
| **If the answer to all of the above questions is NO, the Equality Impact Assessment is complete. If YES, a full impact assessment is required: go on to stage 2.** |
| **Stage 2 – Full Impact Assessment** |
| **What is the impact** | **Level of Impact** | **Mitigating Actions****(what needs to be done to minimise / remove the impact)** | **Responsible Officer** |
|  |  |  |  |
| **Monitoring of Actions** |
| The monitoring of actions to mitigate any impact will be undertaken at the appropriate level |

# IMPLEMENTATION PLAN

|  |  |  |
| --- | --- | --- |
| **Action** | **Responsible Person** | **Planned timeline** |
| Policy to be uploaded to the Procedural Document Library | Education and Development Administrator | Within 2 weeks following ratification |
| Email to all staff  | Education and Development Administrator | Within 2 weeks following ratification |
| Upload policy (+/- assessment tool) to Virtual College and allocate to relevant staff | Education and Development Department | Within 2 weeks following ratification |
| Relevant staff to sign (via Virtual College) that they have read and understood policy. | All staff notified via Virtual College. | Within 2 months of notification |

# GLOSSARY OF TERMS

None

# REFERENCES

Age UK Sutton (2018) Fundraising Policy. Available at [Microsoft Word - 14.2.1 - Age UK Sutton Fundraising policy (1).docx](https://www.ageuk.org.uk/bp-assets/globalassets/sutton/original-blocks/about-us/policies-and-procedures/age-uk-sutton-fundraising-policy.pdf). Last accessed 29/05/2025

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Jersey Gambling Commission (2025a) Code of Conduct for Social and Charitable Gambling. Available at <https://www.jgc.je/assets/Code-of-Conduct-for-Social-and-Charitable-Gambling-March-2025.pdf> Last accessed 29/05/2025

Jersey Gambling Commission (2025b) Advice Note: Conducting Lotteries Raising funds for Charitable, Sporting or Other Good Causes. Available at <https://www.jgc.je/assets/ADVICE-Conducting-Lotteries-March-2025.pdf> Last accessed 29/05/20