

St George's Weybridge Donor Charter & Ethical Guidelines

Philanthropic gifts from individuals, trusts, foundations and corporate donors play a vital and vibrant role in College life and we welcome donations of all sizes. Such support enables St George's Weybridge to offer gifted students assisted places, to fund projects and opportunities, and to enhance facilities for students, staff and the wider community.

St George's Weybridge seeks and accepts philanthropic gifts in accordance with the Institute of Development Professionals in Education (IDPE) guidelines and upholds the Institute of Fundraising's (IoF) Codes of Conduct.

The Mission of the Development Office:

The St George's Weybridge Development Office is the fundraising vehicle for St George's Weybridge ('the College'), a charitable organisation registered with the Charity Commission (Charity Number 1017853). It encourages the solicitation and acceptance of gifts for purposes that will help the College to further and fulfil its mission.

The mission of the College is:

"St George's College, Weybridge and St George's Junior School, Weybridge are independent Roman Catholic co-educational schools which welcome those of other Christian traditions allowing all to develop their ethical, spiritual and moral values.

We seek to inspire a love of learning and to encourage all to fulfil their aspirations and potential within an atmosphere of mutual respect and compassion.

We strive to promote our Josephite tradition which encourages a strong sense of all belonging to one family which encompasses the wider world."

This mission is supplemented by the aims of the Reunite Programme:

"Re-uniting the Georgian Family with each other and the School in order to strengthen our community and enhance educational provision for the future through charitable giving."

Purpose of this policy:

On behalf of the charity led by the Governors and Senior Management Team, the Development Office solicits gifts from individuals, corporations, and charitable trusts and foundations, to help further the mission of the College. These policies and guidelines govern the acceptance of gifts by the College and provide guidance to prospective donors and their advisers when contemplating and/or making gifts. Donations must be freely given with no expectation of anything in return other than due thanks and recognition. The College is pleased to accept lawful donations which are given in good faith and which are compatible with the College's aims, values and strategic objectives.

As the College values and safeguards its autonomy, integrity and reputation, it does not accept donations when a condition of acceptance would compromise these fundamental principles. This policy is to be interpreted so that prospective donors may enjoy the greatest freedom possible in formulating their gifts, whilst safeguarding the best interests of the College.

Fundraising Practices

The Development Office is responsible for:

- the cultivation and stewardship of donors at all levels;
- the management and administration of all pledges, gifts and legacies;
- accounting and reporting for individual gifts in conjunction with the Finance Office;
- compliance with Charity Commission and UK law, including the Data Protection Act of 1998 regarding said contributions;
- ensuring to the best of their ability that all gifts are used according to donor guidelines.

The College encourages the solicitation and acceptance of private gifts and grants that enable it to fulfil its educational mission. Gifts may be sought from individuals, corporations, and foundations.

- All pledges and/or gifts should be accompanied by a completed Gift Form or appropriate written documentation showing the donor's name and purpose of the gift.
- A formal acknowledgement of donations is sent to each donor upon receipt of a gift.

All solicitations and appeals for funds will:

- be truthful;
- accurately describe the College's activities and the intended use of donated funds;
- respect the dignity of the donor and of those who benefit from the College's activities.
- 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.

Members of staff, both paid and volunteer, embody in word and action respect for truth, fairness, freedom of expression, and the opinions of others. They uphold the professional reputation of the College and of other Development and alumni professionals and give credit for ideas, words, or images originated by others. They are obliged to:

- safeguard privacy rights and confidential information.
- not grant or accept favours for personal gain, nor do they solicit or accept favours for the College where a higher public interest would be violated.
- avoid actual or apparent conflicts of interest and, if in doubt, seek guidance from appropriate authorities.

Paid fundraisers will be compensated by a salary, and will not be paid finders' fees, commissions, or percentages of gifts raised based on either the number of gifts received or the value of funds raised.

The Development Office will:

- cease solicitation of a prospective donor who requests no further contact;
- disclose immediately to the College authorities any actual or apparent conflict of interest;
- not accept donations for purposes that are inconsistent with the College's objects or mission.

The Development Office will not share parent, student, prospect, donor or alumni lists outside of the College nor sell or share for the purposes of external marketing, or for use by other charities or corporations.

All restricted or designated donations will be used for the purposes for which they are given, in a timely fashion. If necessary due to programme or organisational changes, alternative uses or extensions to timescales will be discussed where possible with the donor(s). If a donor is deceased, and the College is unable to contact a legal designate, the donation will be used in a manner that is as consistent as possible with the donor's original intent.

Financial reports will be factual and accurate in all material respects.

Gifts are accepted in the following formats:

Cash or equivalent:

In order to comply with money laundering regulations, cash donations of over £100 will not be accepted.

Cheques are accepted and should be made payable to 'St George's Weybridge'.

Development accepts payments by Credit Card which can be made via:

- a donation form
- phone (01932 839352)
- online (via Virgin Money)
- bank transfer (HSBC SGW Donations account)

All cash (or equivalent) gifts are processed by the Development Office and any such gifts should be sent to:

The Development Office
St George's Weybridge
Weybridge Rd
Addlestone
Surrey
KT15 2QS

Shares:

The College can accept publicly traded securities. Securities may be accepted subject to completion of the necessary transfer formalities and the payment of any Stamp Duty. As a general rule, all marketable securities will be sold upon receipt unless otherwise directed.

Tangible personal property:

Tangible personal property includes art, furniture, books, College memorabilia, coin and stamp collections, jewellery, vehicles and any other personal property item owned by a donor. It excludes property and land. The College will examine a potential gift of tangible personal property for the item's financial value, its potential use by the College, any associated ongoing risks or costs to the College (e.g. insurance) and, if the item will not be used or kept, whether the item could be sold quickly and converted into cash.

Property and land:

Gifts of property and land may include gifts of developed property or undeveloped land. Prior to acceptance of gifts of real estate the College shall require a structural survey or other similar review of the real estate to ensure that it offers no significant on-going financial or environmental risks or costs to the College. The cost of such survey or review will generally be at the expense of the donor. Prior to acceptance of the real estate, the gift will have to be approved by the College authorities. The College may accept a remainder interest in a personal residence, farm, or vacation property subject to the provisions above. The donor or other occupants may continue to occupy the property for the duration of the stated life. On the death of the donor, the College may use the property or convert it to cash at their absolute discretion.

Legacies:

The Development Office will gratefully accept legacies for the benefit of the College. The Development Office asks donors wishing to leave a legacy to execute an appropriate Codicil or include in their Will the suggested wording available online or from the Development Office. The College is also keen that such donors complete and return a pledge form so that they can keep accurate records, and such pledge forms should be updated from time to time (e.g. if the size and / or conditions attaching to the legacy changes). In this way, the College can ensure that legacy pledgers can be appropriately thanked.

Donors' Rights

All fundraising solicitations, by or on behalf of St George's Weybridge, will disclose the College's name and purpose for which the funds are requested. Printed solicitations (however transmitted) will also include contact information.

The privacy of donors will always be respected. Any donor records that are maintained by the College will be kept confidential to the greatest extent possible. Donors have the right to see their own record, and to challenge its accuracy.

Donors are thanked and acknowledged via group and individualised communications and events, as well as in the annual report. In some cases, donors will receive invitations to various dinners and events with staff members.

Donors and prospective donors will be treated with respect. Every effort will be made to honour any requests to:

- limit the frequency of solicitations;
- solicit through preferred channel(s) only;
- receive printed material concerning the School
- to remain anonymous. The College may however disclose details of any donor where it is required to do so by law, by any governmental or other regulatory authority, or by order of a court. Senior and Development staff will be, by necessity, aware of the real identity of the donor.

Donors accept that the management and governance of programmes and / or activities funded through philanthropy, rests solely with the College. Donors will, however, be provided with appropriate and commensurate opportunities for continuing engagement with the programmes / activities that they have funded or are funding.

Most donors are deeply interested in the progress of the activity they have supported. Therefore, the Development Office will seek to make follow-up contact with donors to inform them of the impact of their gift, and to offer additional thanks for their contribution.

Ethical Guidelines for the Acceptance of Gifts and Donations

It is agreed that the basis on which the College will actively seek funding is:

- that the full cost of the project is identified (including staff costs; planning and works costs where applicable);
- that the project is approved by the Senior Management Team and Governors as strategically important to enhancing St George's Weybridge's academic standing, facilities, and/or provision of assisted places.
- that in the case of capital projects, any required applications for planning will have already passed - or if not, that this is made clear to prospective donors.

The Board and the Development Office are not responsible for the financial, tax or legal position of donors or of prospective donors in relation to their gifts. Donors or prospective donors must take such advice as they deem necessary and in no circumstances are they entitled to rely on guidance offered by the College and/or the Development Office, whether written or verbal, which can only ever be generic in nature.

To comply with money laundering and related legislation as this might apply from time to time, the College might require donors and potential donors to provide reasonable proof of identity and, if necessary, furnish information as to the origin of the gift to be donated.

The College will enter into appropriate gift agreements with donors for all significant gifts, defined as those of £10,000 and above.

St George's Weybridge reserves the right to consult published or other credible evidence if they suspect that a proposed gift will be made from a source that arises in whole or in part from an activity that:

- involved fraud; violated international conventions that bear on human rights, or limited freedom of enquiry.
- or that will require action that is illegal, seriously damage the reputation of the College, create adverse publicity, or that will create unacceptable conflicts of interest or harm the College's relationship with other benefactors, partners, potential students or wider community.

The College will accept philanthropic donations from students but there is no personal or academic gain to be got by any student from making such a donation.

The Development Office will take reasonable steps to clarify the source of funding. Previous decisions regarding the acceptance of particular gifts, taken in good faith, may be reviewed and may be reconsidered, in the light of new events or information.

Development may not accept gifts that are too restrictive in scope. Gifts that may be regarded as too restrictive are those that are too difficult to administer or gifts that are for purposes outside the wider aims of the College. All final decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the College, although efforts will always be made to establish if the reasonable wishes of donors can be respected.

In turn, St George's Weybridge undertakes that all communications made to potential donors concerning a project will be honest, truthful, and comply with the law and Institute of Fundraising Codes of Conduct. The Institute of Fundraising Code of Practice on "The Acceptance and Refusal of Donations" can be found online: <http://www.institute-of-fundraising.org.uk/code-of-fundraising-practice/>

This policy will be reviewed annually.