



THE PATHWAY ACADEMY TRUST

Registered address: c/o Culverstone Green Primary School,
Wrotham Road, Meopham, Kent DA13 0RF

Registered Company N° 9782388

FUNDRAISING POLICY

Author	Trust Secretary
Approved by	Finance & Audit Committee
Version	1.0

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2. Purpose

The purpose of this document is to set out The Pathway Academy Trust’s (TPAT) position on fundraising practice and to document the standards expected in raising funds from its stakeholders.

The Policy will be reviewed every three years or as required.

3. Introduction

Fundraising is seen by TPAT as a legitimate means of improving the Trust and its schools’ ability to purchase goods, equipment, services or capital projects, which could not otherwise be funded within capital or revenue budgets.

For parents, carers and the broader public, donating cash or equipment, or actively raising funds, is seen as a positive way of supporting the Trust and its schools.

The TPAT Directors are committed to ensuring that fundraising activities are carried out in an appropriate manner and they are responsible for the implementation of this policy.

The responsibility for overseeing the governance of TPAT’s fundraising programme and reviewing this policy is delegated to the Finance and Audit Committee (FAC). The FAC will report regularly to the Trust Board.

All fundraising activities carried out either by TPAT staff or external parties should be in accordance with this policy.

Any proposal for sponsorship involving an entity in which any Member, Director, Governor, Executive Leadership Team (ELT) or member of staff has an interest must be declared as appropriate to the relevant Head Teacher or the Trust Board and that individual will not play any part in the discussions of or decisions relating to that proposal.

4. General principles

TPAT will adhere to the following standards:

- Fundraising activities carried out by TPAT will comply with UK law.
- TPAT will abide by the standards for good fundraising practice as set out by the UK Fundraising Regulator.
- Fundraising activities should not be undertaken if they will expose TPAT to an inappropriate financial or reputational risk.

- Due diligence will be carried out on those individuals and organisations (including partners and others fundraising on behalf of TPAT) that give money or donations in kind to TPAT. Due diligence should identify the origin of the funds and ensure that the people and organisations are known and any associated risks are identified and managed. The appropriate level of due diligence carried out on a donor is likely to be proportionate to the size of the donation.
- Acceptance of donations from and partnerships with individuals or organisations will be avoided if:
 - their objectives are incompatible with the Trust's objectives; and,
 - their activities involve anything that could potentially damage the Trust or schools' income or reputation.
- Any TPAT communications made in the course of carrying out fundraising activities shall be open and transparent.
- All money raised via fundraising activities will be for the stated purpose of the appeal where practical and will comply with TPAT's stated mission and purpose.
- All personal information collected by TPAT is confidential and is not for sale. TPAT's Data Protection Policy sets out the full detail on how TPAT manages personal data.
- Nobody directly or indirectly employed by, or volunteering for, TPAT shall accept commissions or bonuses for fundraising activities.
- Financial contributions will only be accepted from individuals, companies or other organisations that the Trust considers to be ethical.
- TPAT and anyone fundraising on behalf of TPAT will not engage in any intrusion on privacy, be unreasonably persistent in fundraising or place undue pressure on its stakeholders to donate.

5. Approval

Fundraising activities and proposals will be considered so long as they reflect the broad direction of the Trust business plan and the priorities of the relevant School Improvement Plan (SIP).

Class and Year enterprise projects linked to curriculum objectives may fall outside the remit of this policy, but staff should talk to the Head Teacher and School Business Manager (SBM) to ensure school financial procedures are followed.

All internal fundraising events (e.g. sale of donated goods) organised by school staff should be approved by the Head Teacher before they commence.

All external fundraising events (e.g. collections outside school premises, appeals to the media or industry, online fundraising) should be referred to the Trust Central Team regardless of the sum involved.

Requests for approval of fundraising events or activities (whether organised by members of staff or external bodies) should be made using the attached form (see Appendix) to the SBM and copied to the Trust Central Team for information.

Any offers of sponsorship or donations made to members of school staff must be notified to the relevant SBM and Head Teacher. The Head Teacher will seek approval from the Trust Central Team and/or Trust Board depending on the type and degree of donation or sponsorship which is being offered.

Any offers of sponsorship or donations made to members of the Trust Central Team staff must be notified to the Accounting Officer. Approval will be given by the Accounting Officer and/or Trust Board depending on the type and degree of donation or sponsorship which is being offered.

Any offers of sponsorship or donations made to TPAT Directors must be notified to the Trust Central Team who will seek approval from the Trust Board.

Anyone having concerns regarding the school's fundraising schemes should discuss these initially with the school's SBM. The SBM will report regularly to the TBM regarding all fundraising issues. The TBM will refer any issues to the Accounting Officer and/or Trust Board as appropriate.

6. Appendix – Fundraising approval request form

	The Pathway Academy Trust Request for approval of fundraising activities
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Name		Date of request	
Organisation		Date of activity	

If a question does not apply, please insert 'not applicable' (n/a)

Purpose for which funds are to be raised	
How the funds will be raised (collections, raffles, appeal, online, etc.)	
Capital cost of the scheme	
Revenue cost of the scheme	
Proposed source of funding for any additional costs not covered by the fundraising	
Are they likely to be any related ongoing costs, e.g. annual subscriptions and administrative costs. If yes, please provide details.	
For equipment: the proposed source of eventual replacement and timescale	
Any necessary Risk Assessments to be carried out? If yes, please provide details.	
Timescale	
Is insurance required? If yes, please provide details.	

FOR OFFICIAL USE

Approved by		Date received	
Position		Date agreed	
Signature			

A copy of the approved request should be sent to the School Business Manager or Trust Business Manager as appropriate.