

Stephen Perse

Foundation

Gift Acceptance Policy

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1. Overview

- 1.1. The Stephen Perse Foundation (the “**School**”) is a registered charity (charity number 1120608) and regulated by the Charity Commission for England and Wales. The Board of Governors of the School welcome offers of donations of all sizes, which enable its continuing development over the long term and pursuit of its charitable objectives, which are the advancement of education by the provision and conduct of the schools collectively known as The Stephen Perse Foundation (howsoever these shall individually be known from time to time) and by ancillary or incidental educational activities and any other associated activities for the benefit of the community as a whole.
- 1.2. As Trustees of the School, its Board of Governors has overall legal responsibility for decisions relating to whether a donation is accepted or refused. Usually, they delegate day-to-day decision making to senior members of staff as outlined in section 5 below. The Board of Governors must be able to demonstrate that they have acted in the best interest of the charity. They have a duty to consider carefully, on the basis of the evidence made available to them, whether the charity’s interests will be better served by accepting or refusing a particular donation and to act accordingly. These judgements must not promote any Trustee or employee’s personal moral agenda or interest and the Board of Governors must not allow any individual or collective personal, political or ethical issues that are not directly related to the interests of the charity to affect their judgement. Members of the Board of Governors must derive no personal benefit (individually or collectively) from donations, loans or other material support offered to the charity.
- 1.3. This policy applies to all staff, volunteers and contracted fundraisers at the School and its individual schools, and provides a guide to the checks applied to donations when accepting them. It also serves as a public guide to how the School makes decisions about accepting and refusing donations and the procedures they follow and has regard to the Charity Commission guidance, “[Accepting, refusing and returning donations to your charity](#)”. Donors and prospective donors are encouraged to discuss their plans in advance with the Development Team in order to ensure that the School is able to apply any restricted gift in accordance with the donor’s preferred intentions and in accordance with its charitable objectives.
- 1.4. When considering whether to solicit or to accept gifts, the School will consider the following factors:
 - Values - could acceptance of the gift compromise any of the School’s core values of scholarship, advancement of knowledge and understanding, kindness, courtesy, inclusivity, collaboration, diligence, independence, self-reliance, humility, reflectiveness, pursuit of self improvement, good character, individuality, wellbeing, confidence, conserving the environment and living sustainably?
 - Compatibility - is the donor’s intent compatible with the School’s use of the gift?
 - Public Relationships - could acceptance of the gift damage the School’s reputation?
 - Primary Benefit - is the primary benefit to the School’s beneficiaries or the donor?
 - Form of Gift - is the gift offered in a form which the School can use without incurring substantial expense or difficulty?
 - Effect on Future Giving - will the gift encourage or discourage future gifts?
 - Is the gift being offered by an individual who is vulnerable or incapable of making their own financial decisions?

2. Guiding Principles

- 2.1. Members of the Board of Governors, staff, volunteers and contracted fundraisers will act in the best interests of the School and do their utmost to solicit and accept funds to further its charitable objectives, with the presumption that donations are given in good faith and that refusal must be only on the strongest grounds. In soliciting donations from individuals or organisations, those acting on behalf of the School will act with honesty and integrity, will not put undue influence or pressure on

donors and will not mislead or knowingly give false information and will act in accordance with all applicable laws.

2.2. The School will refuse donations in the following circumstances:

- Where the School has reasonable grounds to suspect that the gift has been donated to facilitate money laundering, or other criminal activity, for example but not limited to where there are concerns over financial irregularities, including allegations of tax evasion, bribery or corruption, or there are allegations of illegal conduct, open court cases, or convictions.
- Where we are unable to determine the identity of a donor, unless the gift comes via a Charity Commission registered and reputable donor facilitation organisation, such as but not limited to the Charities Aid Foundation, Stewardship or the Charities Trust, which has carried out appropriate due diligence to ensure the suitability of their client as a donor under UK law and is thereafter acting on behalf of their client in order to provide donor anonymity services. This is separate from a donor wishing to remain anonymous with respect to recognition and publicity associated with their donation. The School is happy to keep the identities of donors confidential upon their request, unless it is legally obliged to release the information.
- Where it can be clearly shown that the cost to the School of accepting a donation will be greater than the value of the donation itself.
- Where the activities of a donor are directly contrary to the objectives or policies of the School.
- Where an offer of support, whilst reflecting the School objectives, is untenable. For example, if the School does not have the resources to maintain the running costs associated with the donation.
- Where the support consists of goods, services or property which the School cannot lawfully use, convert, exchange, or sell in direct support of its charitable objectives.
- Where the offer of support is dependent upon the fulfilment of certain conditions placed upon the School, and these conditions are:
 - contrary to the School's objectives; or
 - require an unreasonable level of support from the School, especially in relation to the size or impact the donation will have on the School's charitable activities; or
 - will divert the School from pursuing its current objectives, policies or work priorities; or
 - unlawful - for example, the conditions specified are discriminatory.

2.3. The School will take great care when deciding whether or not to accept a donation if an offer of support is dependent upon the School first spending its own money or resources in order to facilitate the conditions of the donation, because this might place the charity's assets under undue and inappropriate risk. If the School agrees to accept such a donation, it should usually be given in full prior to commencement of the work to be funded, but may be paid in instalments linked to an agreed contract and work plan at the discretion of the Principal and the Executive Director.

3. Donations from people in vulnerable circumstances

3.1. If a fundraiser has reasonable grounds for believing that a supporter lacks the capacity to make a decision then a donation will not be accepted. Please see the School's policy on fundraising with and responding to people in vulnerable circumstances for further information.

4. Donations from companies

4.1. In addition to the factors set out in paragraph 1.4 above, before accepting a donation from a company, we will also ascertain the nature of its business and make a judgement about whether or not acceptance of a gift from this source could cause unacceptable reputational risk to the School.

4.2. As a charity, it is important to maintain our independence. We value our corporate partners and our donors, but cannot allow funders and corporate partnerships to affect our reputation or unduly influence our charitable activities. Accepting support from companies or other donors will not prevent us from questioning their actions if necessary, nor in expressing our views. We also will not endorse or approve products, services, commercial initiatives, companies or industries.

5. Authority and process

5.1. The authority to make a decision about whether or not to accept a donation is outlined in the table below. The Principal, Executive Director and Director of Development and Communications will ensure that the donations advisory panel as described in the table below (and, when the School has chosen to accept such a gift, the Finance Committee) is made aware of any potentially suspicious donations and any significant and potentially contentious issues. In addition, gifts of any size which can be reasonably foreseen will result in current or future financial obligations for the School, or that will have a significant impact on school facilities and grounds, will usually be referred to the Board of Governors for final approval. The referral will include an accompanying explanation and recommendation from the responsible member(s) of staff, as outlined in the table below, and will be submitted even if the value is below £1,000,000.

Value of gift	Decision on acceptance are made by
Under £50k	Director of Development and Communications, in consultation with the Executive Director.
Between £50k and £100k	Executive Director and Principal
Between £100k and £999,999	A Donations Advisory Panel, consisting of the Principal, Executive Director, Chief Finance and Operating Officer, Chief Compliance Officer and General Legal Counsel, and Director of Development and Communications, may make decisions by majority vote. The Chair of the Board of Governors will have a casting vote in the event of an evenly divided vote and may ask for the decision to go to discussion with the Board of Governors in these circumstances before a final decision is made.
Over £1m	The Board of Governors, acting on the advice of the Donations Advisory Panel.

5.2. For gifts between £100,000 and £999,999 the Donations Advisory Panel assesses each gift using an approval form. The panel will decide whether to approve or reject a donation and may request more information before making a final decision. It will report such decisions to the Governing Body at the next meeting of the Governing Body after the decision has been made.

5.3. The Donations Advisory Panel must also review any gift of £1 million or more prior to submission to the Chair of the Board of Governors, or the Board as a whole, for a recommendation. Where the advice of the Donations Advisory Panel is unanimous, the Chair of Governors may take executive action between meetings to approve acceptance or rejection of a gift. Where there is divided opinion on the merits of a particular gift, or where the Chair of Governors does not wish to take the advice of

the Donations Advisory Panel, the decision must go to a full discussion with the Board of Governors. At times it may be necessary to make a decision before the next scheduled Board of Governors' meeting and an extraordinary, one-item meeting may be called to expedite the process.

- 5.4. If those with the delegated authority are unable to conclude whether a gift of less than £100,000 should be accepted or rejected under the Gift Acceptance Policy, the gift must be referred to the Donations Advisory Panel for a recommendation.
- 5.5. If those with the delegated authority do not feel able to accept the recommendation of the Donations Advisory Panel, the matter must be referred to the Board as a whole for a binding decision.
- 5.6. All donations accepted or rejected over £25,000 will be reported to the Finance Committee. The School's Development and Finance teams will take all reasonable steps to ascertain the source of funding for each gift accepted and will follow the Charity Commission's "know your donor" and other guidance in relation to conducting due diligence on its donors. The School will also review and report to the Finance Committee and the Governing Body regarding all gifts received on a regular basis in order to provide insight into patterns of giving and to give the Committee and Governors the opportunity to ask questions and request further information.
- 5.7. A gift by a donor who wishes for their name to remain anonymous to all but those who closed the gift should be dealt with, as far as possible, in exactly the same way as other gifts. Wherever possible, the School will respect a donor's request for anonymity but as a minimum will ask the donor to provide their name to the Principal, Executive Director and/or Director of Development and Communications, to whom it will fall to determine its acceptability in terms of the sign-off procedure outlined in this document. The donor must be informed of this process from the beginning of any discussion wherever possible.
- 5.8. The School will only refund a donation in the circumstances set out in its Policy on fundraising with and responding to people in vulnerable circumstances. In the event of a refund in such circumstances, the School must ensure that it complies with all relevant legal requirements, including in relation to Anti Money Laundering and the Charity Commission.
- 5.9. For all gifts over £10,000, donors must sign an appropriate gift agreement confirming the purpose of the gift. The only exception to this is where a gift is linked to a specific campaign which has established and prescribed terms. A donor must also sign an appropriate gift agreement for any gift that establishes an endowed fund or has naming recognition offered in appreciation of the gift. The School should employ its standard procedures relating to recruitment, admissions, procurement, management and governance for all capital projects, scholarships, grants and bursaries funded by gifts.
- 5.10. Where the School and donor agree to name a building, room, scholarship or any other aspect of activities in recognition of a particular benefaction, the duration of such naming opportunity shall be agreed in writing (and will only ever be in perpetuity subject to endowment funds provided by the donor continuing to be sufficient for this to continue) between the donor and the School. The School reserves the right to withdraw such named recognition in the future, where:
 - it transpires that the source of the funding is suspicious or arose in whole or part from any activity listed under the recommendations regarding the refusal of donations;
 - the actions of the donor result in reputational damage to the School and/or its ability to deliver its charitable objectives;
 - the donor does not meet their commitments in full and within the agreed timescale.
- 5.11. This policy will be reviewed on an biennial basis, or more frequently if required due to a change in widely-accepted best practice or legal requirements.

6. Related policies and procedures

- Policy on fundraising with and responding to people in vulnerable circumstances
- Fundraising Complaints Procedure

Version Control

Date of adoption of this policy	17 January 2025
Date of last review of this policy	January 2025
Date for next review of this policy	June 2026
Policy owner	Director of Development and Communications
Authorised by	Governing Body