The Manchester Grammar School
Fundraising Policy 2018

The Manchester Grammar School Trust (MGS Trust) is a registered charity, (charity number 526564), which seeks to raise funds to provide means-tested bursaries to the Manchester Grammar School.

The Manchester Grammar School (MGS) is a registered charity, (charity number 529909), which seeks to raise funds for annual expenditure, restricted funds and capital projects.

The fundraising activities for both the Manchester Grammar School Trust and The Manchester Grammar School are managed by the MGS Development Office.

This document is not legally binding, but sets out the principles under which the School will seek to operate when undertaking its fundraising activities. It reflects MGS’s commitment to implementing, as far as possible, best practice in its fundraising activities, and is in line with the current guidance provided by the Institute of Fundraising (IoF).

Summary

MGS is committed to the principle that it solicits gifts from those individuals who have an active relationship with the school – Old Mancunians, supporters, staff, parents and former parents – or those individuals or organisations that have been carefully identified as having a potential interest in supporting a specific activity or initiative.

The School believes and maintains the principle that, wherever possible, all gifts should be made:

- Without coercion and as an informed decision.
- With full transparency and agreement regarding the use of the gift by the School. Should a donation be made at a time when the donor was not able to make an informed decision, but this was not clear to the fundraiser, such a donation would be returned.
- In full confidence that the donor will be acknowledged and recognised as he/she wishes.

Consent

‘Consent must be freely given, specific and informed, and involve a positive indication signifying the data subject’s agreement.’ The Fundraising Regulator

We therefore require our alumni, former parents and supporters to opt-in to be consistent with best practice. This includes separate consent for each marketing channel (post, email, phone etc.) and makes clear the purpose of the communication (financial support, volunteering for
careers support, newsletters etc.). Throughout 2017 the School has worked with Buffalo Fundraising Consultants LTD to obtain communication preferences and consent from our alumni via email, letter and over the phone. This process, which will be completed by May 2018, includes obtaining consent to use available public sources, including the Royal Mail, BT and LinkedIn. Communication preferences are stored on the Development Office database. The Development Office looks to refresh consent every 5 years.

**Legitimate Interest**

Periodically the School approaches current parents and staff for financial support for capital projects and bursary fundraising. The last capital project was the redevelopment of the Lecture Theatre in 2008. The School considers that it has a legitimate interest to approach current parents and staff for support for fundraising initiatives. Once a current parent no longer has a son attending the School further communication from the Development Office will be based on opt-in consent. When a member of staff leaves the employment of the School they become a member of the alumni community and further communication from the Development Office will be based on opt-in consent.

**Constituency**

MGS has about 11,000 contactable alumni on the database. It is from this group, primarily, that the school will focus the majority of solicitations, on the basis that they are the people most likely to support the institution where they studied. To this end, alumni are invited to make a donation to MGS each year provided that they have provided the appropriate consent.

The School also fundraises periodically from current (1600) and former parents (8000), as well as current staff (250).

**Means of Solicitation**

The School employs a range of direct solicitation methods which include telethons, emails and letters, as well as face-to-face approaches.

**Telethons**

The School seeks to contact by phone Old Mancunians who have consented to receive fundraising phone calls from the School. Some existing donors are contacted in order to thank them for their continuing support, update them on news from the School and, in some cases, invite them to increase their donation. All those to be called for the purpose of a donation receive a pre-call letter (either in hard copy or by email) giving them the opportunity to opt out of that particular telethon or of telethons in general. The font size of the opt-out information is the same as that of the letter as a whole, in line with Institute of Fundraising guidance. Alumni over the age of 80 are not called unless they have indicated that they enjoy such communication.

Anyone who wishes to be excluded from telethons is removed from the calling list, and if the request applies to telethons in general, they are given a solicitation code that reflects this. If, during a telephone campaign, anyone asks not to be called, or not to be solicited at all, he/she is removed from the calling list. If a caller, a member of the Development Office team or
other member of the School becomes aware that an individual may be distressed to receive a call, or not have the capacity to make an informed decision on the telephone, he/she is removed from the calling list.

Old Mancunians who have signed up to the Telephone Preference Service and have not given explicit permission to the School to call them will be excluded from the telethon.

Calls are not made from the school phone lines, but anyone who attempts to call back will receive a message with the number of the Development Office should the recipient wish to contact the School.

Callers are recent leavers from MGS. They are professionally trained at the start of every telethon, and expected to speak to each other and those they call with courtesy and respect. One of the purposes of the call is to solicit a donation, but it is also to check contact details, convey news from the School, seek feedback on events and publications and gather support for the careers network. When it comes to asking for a donation, callers are informed about the projects for which MGS seeks support and given guidance about how to ask. They follow the legal requirements when asking for direct debits and gift aid. The School employs a telethon consultant to oversee the telethon and to provide supervision during the calling. The School enters into a formal, written agreement with the consultants. Training is provided by members of the Development Office and the consultant. A member of the Development team visits the call room every day during calling, reviews the call notes and sends a letter to everyone who receives a call.

Under no circumstance will a caller be aggressive – requests for donations are made carefully to ensure that no-one feels pressurised into making a gift.

Callers are employed by the School and paid an hourly rate for the time that they work. Their salary is not calculated on the amount they raise, so they do not feel undue pressure to focus on the fundraising element of the call, but can pay equal attention to building or strengthening the relationship alumni have with the School.

Direct Mail

Once a year, hard-copy fundraising materials, which usually include a brochure about supporting MGS and a donation form, are sent out. The Development Office checks that those who have requested that they are not mailed, or are not solicited, will not receive these solicitations. Such requests are recorded on the database. Every attempt is made to ensure deceased constituents are excluded from such mailings.

During enhanced fundraising periods, the frequency of direct mail may increase to twice a year.

Face-to-face solicitations

Fundraising members of the Development Office, particularly the Director of Development, meet potential and current donors where appropriate to solicit gifts. The solicitation of a major gift is likely to entail a series of meetings.

Every request for a meeting, whether made by letter, email or telephone, where a solicitation,
or a conversation leading to a solicitation is envisaged will explicitly indicate this is the purpose, or part of the purpose, in the request. The fundraiser would not typically accept a gift as ‘cash in hand’ on the day of the meeting. If during the course of the meeting, the fundraiser believes that the potential donor is not capable of making an informed decision about a donation, such a donation will not be solicited. In such circumstances, a note would be made on the database and were any further solicitations to be made, they would be by mail only.

**Email**

From time to time, alumni and other potential donors are contacted by email, (provided that they have provided consent to receive such communications), and this includes information about donations such as links to the giving pages of the website. The School can always be identified as the originator of the message. It is always possible to opt out of receiving email communications.

The School website also contains a wide range of material about how and why people might support MGS by making a donation.

**Acceptance of donations**

All gifts given for a restricted purpose will be received and used solely for the purpose agreed between the donor and the School. Some gifts are unrestricted and are therefore spent at the School’s discretion. The full value of every gift (including gift aid if applicable) is used for the charitable purposes of the School or the MGS Trust; there is no administrative or overhead charge.

The Governing Body of the School may decide to refuse the offer of a donation because the purpose of the donation does not match its fundraising objectives or if there is doubt about the appropriateness or legality of the source. Should a donation be refused for any reason, records will be kept to indicate why it was refused and any such refusal will be couched in appropriate language so that it does not cause offence.

**Gift Aid and Tax Efficient Giving**

The School does not attempt to claim gift aid on any donations which do not meet HMRC guidance, but it is committed to reclaiming gift aid on all gifts made by UK taxpayers where a Gift Aid declaration has been made. To that end, every acknowledgement letter to a donor who has gift-aided his/her gift serves as a receipt for tax purposes. Donors may be provided with a schedule of their donations during the course of a tax year to assist with their income tax returns, if they request this information.

The Development Office works with The British Schools and Universities Fund (BSUF), a 501c3 intermediary, to provide and promote tax efficient means of making a gift from the USA, and Transnational Giving Europe (TGE) to facilitate tax efficiency from gifts originating in Europe.

When a donation is made through BSUF, the name of the donor and the amount given, is received by the Development Office and the School’s representative in the USA.
Handling of donations

In line with IoF best practice, cash and cheques are banked at the earliest possible opportunity. Cash and cheques that have not yet been banked are stored securely. Charity vouchers such as those made through the Charities Aid Foundation (CAF) are sent to CAF to be processed and the money is passed to the Development Office by bank transfer. Card transactions are made through the Development Office’s Merchant Service account and all handling is PCE-DSS compliant.

Donations of shares are co-ordinated between the donor and Secretary to the MGS Trust or School Bursar.

Processing Fees

Payment transaction fees are applied to all gifts made via online donation forms. Donor Debit, which process all gifts made to the MGS Trust by direct debit, charges 25p per transaction. Whilst Blackbaud, which process all gifts made by credit card to the MGS Trust, charges 3.5% on all gifts made using American Express and 2.5% on all gifts made using MasterCard or Visa.

Data Protection

Personal data is processed fairly and lawfully. It is only used for specified and lawful purposes and is not processed in any manner incompatible with those purposes. As far as possible, personal data is accurate, kept up to date and processed in accordance with the rights of data subjects. Personal data is not transferred to a country or territory outside the European Economic Area (EEA) unless that country or territory ensures an adequate level of protection for the rights and freedoms of data subjects.

Appropriate technical and organisational measures would be taken against unauthorised or unlawful processing of personal data, and against accidental loss or destruction of, or damage to, personal data. For fuller information, please refer to the MGS Privacy Policy and the Privacy Policy specific to the MGS Development Office & Archives. Data is not, and has never been, sold to third parties.

Database and Security

All alumni and donor data is held securely on the Development Office database. This database is password protected and only those who need to see financial data have the relevant permissions to do so. Those who are working with the Development Office on a temporary basis, such as the telethon callers, are required to maintain confidentiality.

From time to time, when financial data is transferred outside the School – for example in order to set up direct debits, or to the telethon consultants – files are encrypted.

Paper files are stored securely in the Development Office and credit or debit card details are not recorded on the database, but are stored securely until disposal. Confidential waste of this nature is disposed of separately.
The Development Office produces monthly bank reconciliations for the Bursary Fund and an annual download of all donations. Gift aid claims are prepared and submitted to HMRC electronically either by the Development Office or the School’s Finance Manager. The spreadsheets are stored on the Office’s shared drive, which is part of a secure network. Access is limited to members of the Development Office and the IT support team.

‘One off’ gifts made online are taken by the School’s Merchant Services provider, which complies with current legislation. Regular gifts made online are processed by the Development Office via the School’s Merchant Services provider.

Acknowledgement, Recognition and Stewardship

MGS is committed to the public and private recognition of its donors where it is desired. Each donor can expect to receive a formal and personalised letter from the High Master or the Development Office.

The names of all donors are recorded on the website unless they have requested anonymity. The website does not list the value of individual gifts.

Major donors are given the opportunity of having their name inscribed on the stone donor boards in the Quad.

Other forms of recognition are offered in line with the value of the gifts, such as an invitation to the annual Benefactors’ Lunch, named plaques at the School and the Book of Refoundation.

In no circumstances will a gift be accepted where the donor expects a place or position at the School to be offered, and in no circumstances will such a place or position be offered in recognition of a donation. All places and positions at MGS are gained through academic or professional merit alone and to that end, those interviewing prospective pupils or employees do not have access to donation records for the individuals concerned or their families.

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