

ROSEMARY FOUNDATION

'Hospice at Home'



Reg. Charity No: 1064723
Together for the Community

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The Rosemary Foundation Fundraising Policy

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1. Purpose of the Policy

This policy sets out how The Rosemary Foundation carries out fundraising activities in a way that is legal, ethical, transparent and consistent with our charitable objectives. It aims to ensure that fundraising supports our mission to provide high-quality Hospice at Home services while maintaining public trust and confidence.

2. Scope

This policy applies to all fundraising activities undertaken by or on behalf of The Rosemary Foundation including staff, volunteers, trustees, consultants and third-party fundraisers.

3. Our Fundraising Principles

We are committed to fundraising that is:

- Legal and compliant with all relevant legislation and regulation
- Honest and transparent about how funds are raised and used
- Respectful of donors, supporters, patients, families and the wider community

- Proportionate and cost-effective, ensuring funds raised provide demonstrable benefit to the charity's beneficiaries
- Supporter-focused, valuing long-term relationships over short-term gain
- Accountable and evidence-based, with appropriate oversight and reporting of fundraising activity
- Inclusive and accessible to all supporters and communities

4. Sources of Fundraising Income

The Rosemary Foundation raises funds from a range of sources, including but not limited to:

- Trusts and Foundations
- Community fundraising events and activities
- Corporate partnerships and donations
- In memory giving
- Individual donations and regular giving
- Gift Aid and tax-effective giving
- Appeals, campaigns and online fundraising
- Each income stream is managed appropriately to ensure compliance with this policy and relevant guidance.

5. Standards and Regulation

The Rosemary Foundation:

- Follows the Code of Fundraising Practice
- Is committed to the principles of the Fundraising Regulator
- Complies with relevant UK legislation including charity law, data protection legislation (UK GDPR), and consumer protection law
- Trustees will ensure fundraising activities are properly supervised and monitored in line with guidance issued by the Charity Commission for England and Wales, including Charity Commission guidance CC20: Charity Fundraising.
- We aim to meet best practice standards even where registration with regulatory bodies is not mandatory.

6. Protection of Vulnerable People

We recognise that some individuals may be considered vulnerable. We will:

- Treat all supporters with care, dignity and respect
- Avoid undue pressure or persistent approaches
- Ensure fundraisers are trained to recognise and respond appropriately to vulnerability

- Promptly review, stop or adapt fundraising approaches where concerns regarding vulnerability arise

7. Ethical Fundraising

We will not:

- Use misleading or unclear fundraising communications
- Apply undue pressure to donate
- Accept donations that could compromise our values or independence
- Engage in fundraising that could damage the reputation of the charity
- We will undertake proportionate due diligence on major donors, corporate supporters and fundraising partners.
- Any conflicts of interest relating to fundraising relationships must be declared and managed appropriately.
- The charity reserves the right to refuse or return donations where accepting them would conflict with our charitable aims, ethical standards or reputational responsibilities.

7a. Ethical Partnerships and Charity Washing

- The Rosemary Foundation recognises the importance of maintaining public trust and protecting the integrity and reputation of the charity.
- We will undertake appropriate due diligence before entering into significant corporate partnerships, sponsorships or fundraising arrangements. This may include consideration of:
 - Whether the organisation’s activities are consistent with the values and objectives of the charity
 - Reputational risks associated with the partnership
 - Environmental, social and governance (ESG) concerns
 - Any legal, regulatory or ethical concerns relating to the organisation
- The charity will not knowingly enter into partnerships or accept support where there is a significant risk that the relationship could:
 - Undermine public confidence in the charity
 - Conflict with our charitable purposes or values
 - Be used primarily to improve the reputation of a company or organisation without meaningful alignment to charitable impact (“charity washing”)
- Trustees retain the right to refuse, decline or terminate partnerships or donations where concerns arise regarding ethical standards, reputational risk or alignment with the charity’s mission.

7b. Commercial Partnerships and Fundraising Benefit

- The Rosemary Foundation expects that fundraising activities conducted in support of the charity will deliver a meaningful charitable contribution.
- As a general principle, we would normally expect that at least 10% of the total funds raised through a fundraising activity, commercial partnership or promotional arrangement will be donated directly to the charity, unless otherwise agreed in advance by a member of the fundraising team.

- We reserve the right to decline or discontinue fundraising arrangements where the charitable benefit is considered disproportionate to the commercial or promotional benefit received by another party.

7c. Third-Party Fundraising

- Where fundraising activities are carried out by third parties on behalf of the charity, The Rosemary Foundation will ensure that:
 - Appropriate agreements are in place
 - Third parties are expected to comply with relevant fundraising regulations and this policy
 - Activities are monitored proportionately to protect supporters and the reputation of the charity

8. Donations, Gift Aid and Financial Controls

- All donations are recorded accurately and used in accordance with donor wishes where specified
- Gift Aid is claimed in line with HMRC requirements
- Funds are managed in accordance with the charity's financial policies and internal controls
- Restricted funds are monitored and reported appropriately
- Significant, unusual or anonymous donations may be subject to additional scrutiny and approval processes in accordance with the charity's financial controls and risk management procedures.

9. Data Protection and Privacy

We respect the privacy of our supporters and comply with UK data protection legislation. Personal data will:

- Be collected lawfully and fairly
- Be used only for the purposes agreed
- Be stored securely
- Not be shared without appropriate consent
- Supporters may change their communication preferences or withdraw consent at any time.

10. Complaints

- We take complaints seriously and view them as an opportunity to improve.
- Complaints about fundraising will be handled promptly, fairly and respectfully
- Details of how to complain will be made available on request and on our website
- Where appropriate, complainants will be advised of their right to contact the Fundraising Regulator

We aim to acknowledge complaints within five working days and respond fully within twenty working days where possible.

11. Roles and Responsibilities

- Trustees have overall responsibility for ensuring fundraising is ethical and compliant
- Senior staff are responsible for implementing this policy
- Staff and volunteers involved in fundraising must adhere to this policy and related procedures
- Trustees will receive appropriate reporting on fundraising performance, risks, complaints and compliance matters.

12. Review of the Policy

- This policy will be reviewed at least every three years, or sooner if there are changes in legislation, regulation or fundraising practice.

