



## ETHICAL FUNDRAISING POLICY 2025

*Fundraising at Haller is rooted in dignity, integrity, and community. We value every donor's contribution, and we uphold our responsibility to fundraise with transparency, accountability, and respect – for our supporters and for the people we serve.*

### 1. Purpose

The Haller Foundation is committed to fundraising in a manner that is transparent, ethical, and aligned with our mission, values, and donor criteria. This policy outlines the principles and standards we uphold in all our fundraising activities and donor relationships.

### 2. Scope

This policy applies to all trustees, staff, volunteers, consultants, partners, and third parties who fundraise or engage donors on behalf of the Haller Foundation.

It covers all forms of fundraising, including:

- Individual donations and major gifts
- Trusts and foundations
- Corporate partnerships
- Community fundraising and events
- Legacy giving
- Online and digital fundraising

### 3. Our Fundraising Principles

Haller will fundraise in accordance with the following ethical principles:

#### A. Integrity

- We will be honest, open, and transparent in all fundraising communications.
- We will never exaggerate need or manipulate emotions to generate income.

#### B. Respect

- We respect donors' rights to privacy and preferences, including how and when they are contacted.
- We will not apply undue pressure or exploit vulnerability.

#### C. Accountability

- We are accountable to our donors, beneficiaries, and regulators.
- We will use donations effectively and report on their impact honestly.

#### D. Alignment

- We will only accept funds from individuals, companies, or institutions whose values, ethics, and operations do not conflict with the aims, values, or reputation of Haller or harm the communities we serve.

## 4. Acceptance and Refusal of Donations

The Haller Foundation reserves the right to decline a donation or partnership if:

- The source of funding is derived from activities that contradict our values (e.g. arms trade, exploitative labour practices, tobacco, environmentally harmful industries).
- The donor seeks to unduly influence Haller's independence, mission, governance, or programming.
- Accepting the donation may harm our beneficiaries, credibility, or relationships with key stakeholders.

We will apply a due diligence and risk assessment process for:

- Donations over a specified threshold (e.g. £10,000).
- Corporate partnerships.
- Offers from donors with potential reputational or ethical concerns.

Final decisions will rest with the Board of Trustees.

## 5. Compliance and Regulation

Haller will comply with:

- The Charity Commission's guidance on fundraising (CC20).
- The Fundraising Regulator's Code of Fundraising Practice.
- Relevant data protection laws (e.g. UK GDPR and Data Protection Act 2018).
- Companies House obligations for financial transparency and good governance.

We are committed to safeguarding the reputation of the charity sector and upholding the highest standards of practice.

## 6. Working with Third Parties

- Any third-party fundraisers acting on behalf of Haller will be required to agree to this policy.
- We will ensure any fundraising agency or individual representing Haller reflects our values and complies with relevant legal and ethical standards.
- Due diligence will be carried out before entering any contractual fundraising partnership.

## 7. Use and Stewardship of Donations

- Donations will be used for the purposes for which they were given, and we will honour any donor restrictions or conditions transparently.
- Where unrestricted donations are given, they will be allocated in line with strategic priorities and operational needs.
- We will thank and acknowledge donors appropriately, unless anonymity is requested.

## 8. Transparency and Reporting

- Haller will publish accurate and clear financial reports, including income from donations and how funds are spent, in our Annual Report and to Companies House.
- Donors may request information about how their funds have been used, and we will respond transparently and promptly.

## 9. Complaints and Feedback

- Haller welcomes feedback and takes complaints seriously.
- A clear complaints procedure is in place, and any concerns about fundraising practices will be investigated promptly and fairly.

## 10. Review and Oversight

- The Board of Trustees is ultimately responsible for ensuring that fundraising is carried out in line with this policy and legal requirements.
  - This policy will be reviewed every **two years**, or sooner in the event of significant regulatory or strategic changes.
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**Updated 08 May 2025**

**Chloe Ford-Welman, Foundation Director**

