Pate's Grammar School

Donations Policy

Approved by: Finance & Facilities Committee **Date: September 2026**

Next Review due by: September 2028

Contents

1. Introduction
2. Scope
3. Guiding Principles
4. Acceptance of Donations
5. Financial Donations
6. Gifts in Kind
7. Fundraising Activities
8. Donor Recognition and Anonymity
9. Data Protection and Donor Records
10. Ethical Considerations
11. Record Keeping and Reporting

1. Introduction

This policy sets out the principles and procedures governing the acceptance, management, and use of donations received by Pates Grammar School. It ensures that all donations support the school's educational mission while maintaining transparency, accountability, and integrity.

2. Scope

This policy applies to all forms of donations, including:

- Monetary contributions
- Gifts in kind (equipment, books, supplies, etc.)
- Sponsorships and grants
- Fundraising proceeds
- Legacy gifts or bequests

3. Guiding Principles

Pates Grammar School will:

- Accept donations that align with its educational values and objectives
- Ensure all donations are handled with integrity and transparency
- Comply with all relevant legal and regulatory requirements
- Avoid accepting donations that may:

- Compromise the school's independence
- Create conflicts of interest

4. Acceptance of Donations

4.1 Approval

All donations must be reviewed and approved by:

- The Headteacher/Principal

Additionally:

- Donations over £10,000 must be reviewed and approved by the Finance and Facilities Committee
- Any unverified or suspicious donation of £25,000 or more must be referred to the trustees, supported by evidence that appropriate due diligence has been carried out before the donation is accepted or declined.

4.2 Conditions

The School reserves the right to decline any donation where it considers that acceptance would not be in the best interests of the School or would expose it to financial, legal, regulatory, operational, or reputational risk.

Donations may be declined if they:

- Are linked to illegal, unethical, fraudulent, or controversial activities.
- Are made by a donor whose identity cannot be satisfactorily verified.
- Are subject to conditions that conflict with the School's values, objectives, charitable purposes, or policies.
- Require commitments, obligations, or activities that the School is unable or unwilling to fulfil.
- Form part of an unusual or substantial one-off donation, a series of donations, or an interest-free loan where the source of funds cannot be adequately identified or verified.
- Require the School to act solely as a conduit for transferring funds to another individual or organisation.
- Contain conditions that prevent trustees from being satisfied that the funds will be used appropriately and in accordance with the donor's intentions.
- Require the return of donated funds to the donor after a specified period, or otherwise resemble a temporary deposit or loan rather than a genuine donation.

- Involve foreign currency arrangements or other unusual conditions that create financial, legal, or regulatory concerns.
- Require the School to engage specific individuals, suppliers, or organisations where there are concerns regarding their suitability, integrity, or value for money.
- Require the School to provide services, benefits, or preferential treatment to the donor or any person nominated by the donor.

4.3 Restricted Donations

Where donors specify how funds should be used:

- The school will honour reasonable restrictions
- If restrictions cannot be met, the donation may be declined or renegotiated

5. Financial Donations

- All donations must be:
  - Accurately recorded in the school's financial records
  - Deposited into the school's official bank account
- Proper receipts will be issued to donors
- Use of funds will comply with the school's financial procedures

6. Gifts in Kind

- Non-cash donations will be:
  - Assessed for suitability, safety, and relevance
- The school will only accept items that meet its needs
- The school reserves the right to use, store, or dispose of items at its discretion

7. Fundraising Activities

- All fundraising conducted in the name of the school must:
  - Be approved in advance by school leadership
  - Comply with relevant legislation and safeguarding requirements
- External fundraising on behalf of the school must:
  - Be formally authorised in writing

8. Donor Recognition and Anonymity

- The school will formally acknowledge all donations unless anonymity is requested

- Recognition may include:
    - Written thank-you letters to all donors
    - A personal telephone call from the Headteacher, appropriate to the level of donation
    - Inclusion in school reports, newsletters, or other communications (subject to consent)
- Donor information will be handled in accordance with data protection legislation (UK GDPR)

9. Data Protection and Donor Records

- The school maintains a secure donor database using ToucanTech, which is GDPR compliant
- This database includes:
    - Past students (alumni) and parents who have consented to the school holding their information
    - Records of all donations received
    - Gift Aid declarations, where applicable
    - Records of communications with donors
- All personal data will be:
    - Processed in accordance with UK GDPR and data protection legislation
    - Used only for legitimate school purposes
    - Stored securely and not shared with third parties without consent
- Individuals have the right to:
    - Access their data
    - Withdraw consent at any time
    - Request correction or deletion of their data

Requests should be made in line with the school's Data Protection Policy.

10. Ethical Considerations

The school will not accept donations from sources that:

- Conflict with safeguarding principles
- Promote discrimination, harm, or illegal activities
- Could negatively impact the welfare of students or staff

11. Record Keeping and Reporting

- All donations will be properly recorded and subject to audit
- The school may publish summary information on:
    - Total donations received
    - General use of donated funds
- Accurate records will be maintained to ensure transparency and accountability

12. Complaints

Any concerns or complaints regarding donations should be directed to:

- The Headteacher
- Or the Governing Body

All complaints will be handled in accordance with the school's Complaints Policy, which is available on the school website.