Charities, Fundraising & Challenge Events

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Excellent fundraising *for a better world*

Our members...

- 445 organisations

- 5,500 individual members from

  2,500 charities

- 20/20 Top UK Charities

- £9 billion worth of voluntary income

Membership offers include

Individuals
- Professional development focus
- Discounts on qualifications, training, conferences, Convention
- Access to IoF Group events
- Fundraising magazine and Civil Society website

Organisations
- Policy and influence
- Standards setting
- Insight and research
- Flexible discounts for professional development
- Supplier offers

Setting the Standards

- Code of Fundraising Practice

- **Legal, Open, Honest, Respectful**

- Guidance

MUST = a legal requirement
OUGHT = a standard set by IoF

MUST	OUGHT
OUGHT NOT	MUST NOT

http://www.institute-of-fundraising.org.uk/guidance/code-of-fundraising-practice/

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Code of Fundraising Practice

FUNDRAISING GUIDES

CODE OF FUNDRAISING PRACTICE

> **LEGAL APPENDICES**

> **GUIDANCE**

> **STANDARDS COMMITTEE**

> **KEEPING UP TO DATE WITH THE CODE**

LAW AND REGULATION

FIVE MINUTE FUNDRAISER

TAX EFFECTIVE GIVING

INNOVATION ZONE

CODE of **FUNDRAISING PRACTICE**

Legal Open Honest Respectful

The Code of Fundraising Practice represents the standards set by and expected of all Institute of Fundraising members.

To see the progress of the new Code of Fundraising Practice in an infographic, please **click here.**

The Code and Self-Regulation of Fundraising

The principle of self-regulation is to allow individuals and fundraising organisations to demonstrate best practice, eliminate poor practice and increase public trust and confidence in the voluntary and community sector.

There are two key parts to self-regulation. Firstly, the Code of Fundraising Practice contains the standards that the fundraising community sets through the work of the Institute of Fundraising's Standards Committee, as well as offering legal guidance in key areas.

Secondly, the Fundraising Standards Board (FRSB) acts as an independent public complaints system for the self-regulatory scheme, licensing the scheme's logo to its members and offering a system of redress for the public. Members of the FRSB scheme are required to adhere to the Code of Fundraising Practice and the Fundraising Promise.

The Institute of Fundraising encourages all fundraising organisations to join the FRSB.

This document has more detail on the role of the FRSB

Must or Ought?

- All funds raised for a particular cause _____ be used for that particular cause

- Organisations _____ employ all best efforts to avoid soliciting regular donations, such as Direct Debits, from under ____

- Organisations _____ maintain good data hygiene practices (removing incorrect information from your data) to ensure donor information is accurate, reflects donors' communication preferences and is retained only for as long as necessary

Must or Ought?

- All funds raised for a particular cause **MUST** be used for that particular cause

- Organisations **OUGHT** to employ all best efforts to avoid soliciting regular donations, such as Direct Debits, from under **18s**

- Organisations **MUST** maintain good data hygiene practices (removing incorrect information from your data) to ensure donor information is accurate, reflects donors' communication preferences and is retained only for as long as necessary

What if charities break the code?

Institute of Fundraising

Set the Code

Expect members to follow it

Do not enforce the Code, make rulings, or sanction

FundRaising Standards Board

Take complaints from members of the public
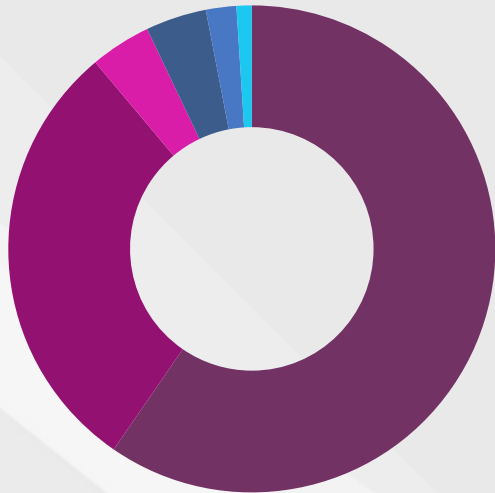
Make judgments according to the IoF Code

Sanction charities:
- Apology
- Training
- Withdraw fundraising material

What bothers the public - key findings FRSB Annual Complaints Report 2014
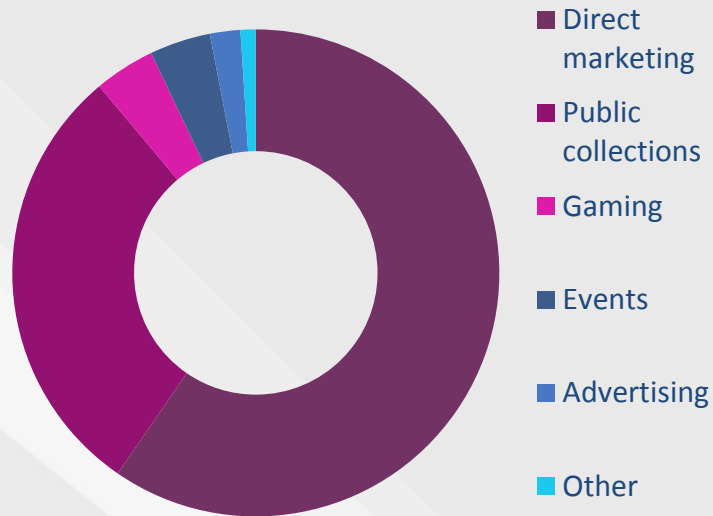
Complaints by fundraising type

Top 10 Methods

Method	Complaints	Volume	Avg complaint rate
Clothing Collections			
Email			
Un-addressed DM			
Addressed DM			
Telephone			
Doorstep F2F			
Street F2F			
Raffles			
Lotteries			
Outdoor Events			

What bothers the public - key findings FRSB Annual Complaints Report 2014

Complaints by fundraising type

- ■ Direct marketing
- ■ Public collections
- ■ Gaming
- ■ Events
- ■ Advertising
- ■ Other

Top 10 Methods

Method	Complaints	Volume	Avg complaint rate
Clothing Collections	5,699	82,108,839	0.0002
Email	1,847	209,959,043	0.0003
Un-addressed DM	1,260	242,940,851	0.0000
Addressed DM	16,966	201,400,512	0.0004
Telephone	8,019	14,389,018	0.0011
Doorstep F2F	7,041	44,346,504	0.0007
Street F2F	739	26,036,820	0.0000
Raffles	991	46,521,771	0.0001
Lotteries	880	55,998,520	0.0002
Outdoor Events	1,919	1,561,046	0.0018

Key things to be aware of...

- Does the donor have all the right information? Be clear what the activity is, which charity will benefit, and if any professional fundraiser is involved

- Make sure you have a safe and transparent way of taking the money and the charity can receive it

- Know the rules and any legal issues!

And particularly for challenge events

a) When identifying a suitable venue/ location for an event, fundraising organisations:

- **MUST** consider issues of equal access for all, even if an event is being targeted at a specific group of people.
- **MUST** ensure the venue complies with legal requirements about health and safety.
- **OUGHT** to ensure the venue/location is fit for purpose, taking note of any restrictions.
- **OUGHT** to be able to justify any environmental impact the event may have.

And particularly for challenge events

- Fundraising Organisations planning an event **MUST** ensure that any required permissions or licences are obtained from the local authority or other relevant bodies.

- When looking to use private property, Fundraising Organisations planning an event in England and Wales **MUST** obtain permission if necessary

- Organisations **OUGHT** to have written agreements with all external parties clearly highlighting all parties' rights, responsibilities and obligations.

More guidance….

- Permissions

- Insurance

- Risk assessment

- Health and safety

- Environmental concerns

- Participants and volunteers

http://www.institute-of-fundraising.org.uk/guidance/code-of-fundraising-practice/guidance/outdoor-uk-challenge-events/

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More information

- Introductory videos http://www.institute-of-fundraising.org.uk/guidance/five-minute-fundraiser/

- Code of Practice http://www.institute-of-fundraising.org.uk/guidance/code-of-fundraising-practice/

Contact us: policy@institute-of-fundraising.org.uk