

Fundraising Policy

VERSION [1.1]

Version Control

Note: minor updates increase version number by 0.1, major updates increase version number by 1.0.

Version Number	Sections Amended	Date of update	Approved by
1.0	New Policy and Procedure drafted	21.10.2025	Chair of the Foundation
1.1	Split policy and procedure into separate documents for greater clarity	16.04.2026	Managing Director Foundation

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Fundraising Policy

1. Introduction

- 1.1 Octavia Foundation relies on voluntary donations, grants, and partnerships to fulfil its mission. This policy outlines the ethical principles and practical procedures for all fundraising activities, ensuring that they meet our strategic aims, uphold our values, and align with the latest standards set by the Fundraising Regulator's Code of Fundraising Practice (2025).

2. This policy applies to...

- 2.1 All staff, volunteers, and trustees of the Octavia Foundation. Relationships with individuals, charitable trusts, companies, community groups, corporate partners, cause related marketing, donations, sponsorship, volunteering, and gifts in kind. Third-party fundraisers who are brought in to support bid writing or other areas of our fundraising function.

3. Policy

- 3.1 The Octavia Foundation's fundraising and partnerships will always be:
 - 3.1.1 Legal, Open, Honest and Respectful. All our activities will comply with applicable laws and adhere to these four principles.
 - 3.1.2 Transparent and Accountable. We will be open about how funds are used and ensure all stakeholders have access to relevant information.
 - 3.1.3 Fair and Non-Discriminatory. We will not discriminate against any person or group on the basis of protected characteristics under the Equality Act 2010.
 - 3.1.4 Proportionate and Informed. We will carry out appropriate and proportionate due diligence for all fundraising and partnership activities.

4. Our service commitments

- 4.1 The Octavia Foundation is committed to safeguarding not only supporters but also those who deliver our fundraising. All staff, volunteers, and third-party fundraisers will be treated with dignity and respect.
- 4.2 We will recognise and respect vulnerability, including (but not limited to) those experiencing illness, disability, bereavement, financial hardship, or social isolation.
- 4.3 We will never accept donations if we believe it would be exploitative, harmful, or if the donor lacks capacity to give.
- 4.4 We will provide staff with training on recognising and supporting vulnerable people.
- 4.5 We will follow safeguarding best practices in all fundraising activities
- 4.6 We will take feedback and concerns seriously in line with our Fundraising Complaints Policy and Procedure.
- 4.7 We will not accept donations that align with our mission and will not compromise our integrity. We will only refuse and return donations in

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exceptional circumstances, in accordance with the guidance in our Fundraising Procedure.

- 4.8 We will conduct due diligence on donations and partnerships to balance funding benefits with potential risks.
- 4.9 We will undertake due diligence and risk assessments in appropriate areas of our activity to ensure the wellbeing and safety of the people we serve and transparency with and accountability to staff, trustees and stakeholder and community groups.
- 4.10 The Octavia Foundation will not offer commission-based fundraising or incentives. When staff, officers, or trustees are paid to fundraise (or when required by law), the Octavia Foundation will take steps in accordance with our Fundraising Procedure to ensure partnerships are aligned with our charitable objectives.
- 4.11 We will ensure all donations are used for the purposes specified by the donor, in line with the Octavia Foundation's charitable objectives.

5. Legal & Regulatory Framework

- Fundraising Regulator Code of Practice framework (1 November 2025).

6. Related Policies

- Fundraising Complaints Policy and Procedure.

7. Related Procedures

- This policy links to the Fundraising Procedure

8. Associated Documents

No further documents.