



# Fundraising policy

Owner	Chief Development and Communications Officer
Approved by (role) and date	Board of Trustees – 1 March 2022

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## 1. Introduction

This policy sets out current guidance on Forum’s fundraising activities. It is written with the assumption that Forum the policy be available publicly. The wording is meant to summarise key points and principles in plain English rather than provide any level of operational detail.

Full details of any gifts we don’t accept, decision making, due diligence process etc. is in a separate gift acceptance policy.

This policy sets out the principles common to all locations. We also recognise and support essential differences due to differing country contexts and legislation. We have noted where we are aware of

additional requirements which will be specific to one location only. At present, our fundraising is largely restricted to UK/Europe and the USA.

## 2. Who this policy is for

All staff, trustees, volunteers, and suppliers involved in fundraising.

The Chief Development and Communications Officer is responsible for ensuring the relevant people are familiar with this policy.

## 3. Respectful fundraising

### Where our money comes from

Philanthropic funding is critical to Forum's ability to accelerate the transition to a just and regenerative future, enabling us to drive transformational system change and providing flexibility and freedom in how we achieve our mission. Forum raises funds from trusts and foundations, institutional funders, companies and individual philanthropists. We only accept philanthropic donations from funders we know well, and whose operations align with Forum's mission and objectives.

### How we raise funds

Our fundraising efforts focus on building long-term, strategic partnerships with people and organisations who share Forum's vision for a sustainable future. We do not make direct marketing appeals, or carry out mass participation fundraising events, street or door-to-door fundraising,

All Forum staff follow both our organisational values and those expressed in the International Statement of Ethical Principles in Fundraising: we are honest, truthful, respectful, transparent, and act responsibly and with integrity.

### Gifts for specific projects

Wherever possible, Forum actively encourages our funders to provide core support that we can use where it is needed most, and that helps to strengthen our capacity to create a more sustainable world. At present, this represents a very small fraction of our organisational income.

Forum also seeks philanthropic donations to support specific projects and areas of work. We will only use these restricted donations for the purpose for which they were provided. If any excess funds remain after the completion of the project, we will seek agreement from our donors to transfer their investment to other specific projects or general activities.

## 4. Legal and regulatory requirements

All fundraising activities we carry out comply with the national and international legal and regulatory framework as it applies to Forum as an organisation, and to fundraising in each country where we operate.

### India

At present, Forum's legal form in India means we cannot directly accept philanthropic donations from individuals, trusts or foundations within India. Our fundraising activities are focused on relationship building and securing income through re-granting from other registered non-profit organisations, or on securing donations from organisations in Europe or the US.

### Singapore

At present, Forum's legal form in Singapore allows us to accept philanthropic donations but we are not able to issue receipts that would allow for a tax deduction for donors, which will limit our ability to generate donations from individuals. In order to do so, we would need to register as an "Institution of Public Character" which raises the level of regulatory compliance beyond that of a standard charitable organisation.

### UK

The Charity Governance Code requires fundraising policy and procedures to be in place and regularly reviewed by the board. Charities must also comply with [The Fundraising Regulator's Code of Fundraising Practice](#).

The following legislation is applicable to Forum for the Future:

- [Charities Act 1992](#) and [2011](#)
- [Charities \(Protection and Social Investment\) Act 2016](#)
- [HMRC Gift Aid rules](#) (individual donations)
- [General Data Protection Regulations](#) (GDPR) and [Data Protection Act 2018](#)
- [Personal and Electronic Communications Regulations](#) (PECR)
- [Due diligence checks and monitoring end use of funds](#), Charity Commission (including Know Your Donor)
- [Treating Donors Fairly](#) guidance, Institute of Fundraising (safeguarding)

### USA

- [New York Not-for-Profit Organization Law](#)

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- New York Codes, Rules and Regulations of the State of New York Title 13. Department of Law Chapter V. [Charitable Uses and Purposes](#)
- [Section 501\(c\)\(3\)](#) of the Internal Revenue Code and guidance (e.g. [IRS publication 557](#))
- Association of Fundraising Professionals: [Code of Ethics, Guidelines & Standards](#), and [Donor Bill of Rights](#)

## 5. Complaints

We recognise that, although our funders may share Forum's values, they may not always agree with everything we say or do – in our work or in raising funds. We welcome feedback and seek to respond promptly and consider all views expressed.

We will acknowledge any fundraising complaint within five working days and aim to resolve complaints within 10 working days of receipt. If you are not satisfied, you may take your complaint to the Fundraising Regulator in the UK or the Attorney General's Charities Bureau in New York State.

To make a complaint about Forum's fundraising activity please get in touch using the details below:

**Phone:** 020 7324 3620

**Email:** [fundraising@forumforthefuture.org](mailto:fundraising@forumforthefuture.org)

**Write:** The Development Team

Forum for the Future  
3rd Floor, 22-26 Paul Street  
London, EC2A 4QE

## 6. Related policies and procedures

- Anti-bribery policy
- Corporate engagement guidelines
- Data protection policy
- Gift acceptance policy

## **7. Monitoring of compliance**

The Chief Development & Communications Officer will be responsible for ensuring this policy is kept up to date.

## **8. Procedure and timing for the review of this policy**

This policy will be reviewed as a minimum every two years. Comments or suggestions on how this policy is operating should be sent to the Chief Development & Communications Officer.

## Appendix: change log

List any major changes made since last version or between approvals

<b>Date</b>	<b>Section</b>	<b>Brief summary</b>
September 2019		New policy
March 2022		Minor amendments (e.g. office address). Addition of shared email address for complaints.