



THE INSTITUTE OF CONSERVATION

Ethical Fundraising Policy

Policy number:	Governance 03.08
Summary:	This Policy details the Institute of Conservation’s (Icon) approach to ethical fundraising.
Who this policy applies to:	<u>The Policy applies to Icon’s Trustees, Staff, Groups and Networks.</u>
Author/policy contact:	Sara Crofts
Approved by/approval level:	Board of Trustees
Date effective:	26 th June 2019
Last reviewed or updated:	26 th June 2019 (first adopted)
Frequency of review:	Every two years – next due 26 th June 2021

1	Introduction
	<p>The day-to-day operations of Icon are supported by income from membership subscriptions, the Conservation Register, publications sales and advertising. However, the delivery of special projects and other one-off initiatives commonly relies on funds raised for these specific purposes. Icon also has an ambition to increase its unrestricted reserves to enable it to develop and to support future projects. In order to raise funds for these purposes Icon aims to develop and maintain a broad fundraising base. Our approach will be consistent with fundraising best practice and with the guidelines provided by the Institute of Fundraising and the Charity Commission.</p> <p>The purpose of creating this ethical fundraising policy is to ensure clarity and openness to all our stakeholders. All Icon staff, trustees and members involved in fundraising have a responsibility to be aware and have a thorough understanding of the ethical issues referred to in this policy.</p>
2	Principles
	<p>Icon actively seeks opportunities to work with external organisations and individuals to achieve shared objectives. However, it is essential that Icon maintains its independence and does not allow any third party to bring its name into disrepute. Icon will therefore accept financial support from, and work in partnership with, third parties (companies and individuals) on the following conditions:</p> <ul style="list-style-type: none"> • The outcomes of fundraising activities must support the work of Icon in terms of delivering its charitable objects and its Strategy. • Fundraising activities should not bring adverse publicity or reputational risk to Icon. • Icon will not allow any company or individual offering funding or sponsorship to influence the policy or activities of Icon either explicitly or implicitly.

	<ul style="list-style-type: none"> • The independent status of Icon will not be compromised by fundraising activities in any way. <p>Our approach to fundraising reflects our organisational values which are to:</p> <ul style="list-style-type: none"> • Work with integrity. We are open and honest and do what we believe is best for our shared cultural heritage, the public and our members. • Be inclusive. We value diversity and ensure that opportunities are open to all those who want to care for our heritage. • Be forward-looking and outward-looking. We keep our eyes on the horizon and on the world around us. • Be ambitious. Both for our organisation and the things we believe in. • Be collaborative and generous. We work with our members and partners to share learning and achieve the best results together. • Uphold high standards. We value, support and promote the expertise and professionalism of our members and partners.
3	Avoidance Criteria
	<p>Icon will not accept financial support from, or enter into a partnership with, any third party involved with activities which might damage the reputation of Icon. Icon will not accept donations or sponsorship where:</p> <ul style="list-style-type: none"> • The donor or sponsor is known to be associated with criminal sources and/or illegal activity. • The donor or sponsor’s objectives conflict with those of Icon. • Accepting a donation or sponsorship might impact adversely on Icon’s reputation. • Accepting a donation or sponsorship could damage Icon’s longer-term fundraising prospects.
4	Acceptance Criteria
	<p>Icon will ensure that all marketing and fundraising activities carried out on its behalf are consistent both with this policy and with best practice in the charitable sector. We will also ensure that any donation or sponsorship from, or relationship with, a third party does not in any way compromise this policy, damage Icon’s reputation or jeopardise future fundraising opportunities.</p> <p>Icon will always also ensure that it complies with relevant legislation, including legislation on data protection, money laundering and bribery. We will also follow Government guidance in relation to acts of terrorism and political activity.</p> <p>Icon will encourage all supporters to give financial support as general, unrestricted funds. This provides the freedom to use funds where and when they are needed most. Occasionally, Icon may ask its supporters to fund specific projects, campaigns or areas of work. Any donations raised in this way will be used for the designated purpose for which they were provided. Should excess funds for such initiatives be collected, the supporter’s agreement will be sought for transferring the gift to other specific projects or to general activities.</p>

5	Summary
	<p>This Ethical Fundraising Policy has been drawn up to provide guidance to all those engaged in fundraising activity on behalf of Icon. It should be employed consistently and rigorously to ensure all fundraising activity is consistent with the principles outlined above. Should there be any doubt, the advice of the Chief Executive should be sought.</p>
6	Responsibility
	<p>The Chief Executive is responsible for compliance with this policy, with the support of the Senior Management Team.</p> <p>The responsibility for making judgements on whether Icon should refuse a donation or seek/decline a sponsorship opportunity resides with the Chief Executive, who will be advised by the Senior Management Team. Judgements will be made using the criteria outlined above after a process of due diligence has been carried out. If Icon does enter into a funding or sponsorship agreement with a commercial organisation then the Chief Executive will continue to monitor that relationship and will ensure that Icon has the right to review or cancel the agreement, or return funds if concerns arise.</p> <p>The importance of safeguarding Icon’s reputation and standing in the cultural heritage sector is fundamental in this regard in order to allow us to continue to champion high professional standards in conservation. If appropriate, the Chief Executive may seek additional advice from the Chair of the Board of Trustees, who may consult the Board of Trustees.</p>