

Fundraising or Gift Acceptance Policy Template for smaller-scale and grassroots cultural organisations or non-registered charities

For smaller-scale and grassroots cultural organisations or non-registered charities, the following framework to create a fundraising or gift acceptance policy is suggested.

Small-scale and grassroots cultural organisations will usually adopt a risk-based approach to fundraising which will be overseen by trustees or leadership committees.

This template can be adapted for your organisational context, including the likely risks related to fundraising and to cover different scenarios as they may occur.

1. Introduction

Outline details about your organisation, its work and purpose and explain how this policy supports your organisation to fundraise.

2. Purpose

Detail the purpose of the policy, for example, to ensure that funds are raised legally, responsibly, and in line with trustee responsibilities.

3. Due Diligence

Make it clear how you will conduct due diligence checks and that your approach will depend on the size of funding, source and individual circumstances. Detail your approach here.

Explain any red lines and your decision method/s for accepting or declining funding.

If appropriate, outline how the organisation protects artistic / curatorial independence.

4. Donor Checks

Outline your approach to due diligence and any additional due diligence that you will undertake on funding sources when needed, for example, when:

- A donation is unusually large
- A donor requests anonymity
- Funds originate from overseas
- Conditions are attached

Such checks could include:

- Confirming donor identity
- Understanding the source of funds
- Checking for sanctions
- Recording decisions

Be clear that you may pause or decline a partnership or funding whilst your organisation reviews the associated risks involved.

5. Reputational Alignment

Make it clear that the organisation will accept support only from donors whose activities align with its organisational purpose and stated public commitments.

Outline here what best practice means for your organisation against the different income streams that you are seeking, including how you will treat donors and respond to their wishes.

6. Refusing Donations

Detail that refusals of funding are exceptional and will be clearly documented with reasons given.

7. Trustee or Leadership Team Oversight

Be clear that trustees (for charities) remain legally responsible for fundraising and will ensure they can justify their approach to good practice.

Outline your structure for leadership oversight of the policy if your organisation is not a charity.

8. Communication

The policy will be shared with staff, freelancers and visiting artists (adapt accordingly).

Concerns about how this policy has been applied can be raised via (complaints email / process). We will respond within (x) working days.

9. Review

This policy will be reviewed annually by the trustees and after any major funding decision and will be updated as required to remain effective and relevant.

10. Approval and Implementation

This policy has been approved by the Board of trustees of (Organisation Name) and is effective from (Date). All staff, volunteers, and trustees are expected to adhere to this policy.

Signed: (Chair of the Board of trustees or designated leadership member)

Date:

Revised and Updated: