

# More

#IDPE17

## Excellent fundraising for sustainable futures: ethics, compliance and good practice

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# **Excellent fundraising for sustainable futures: ethics, compliance, and good practice**

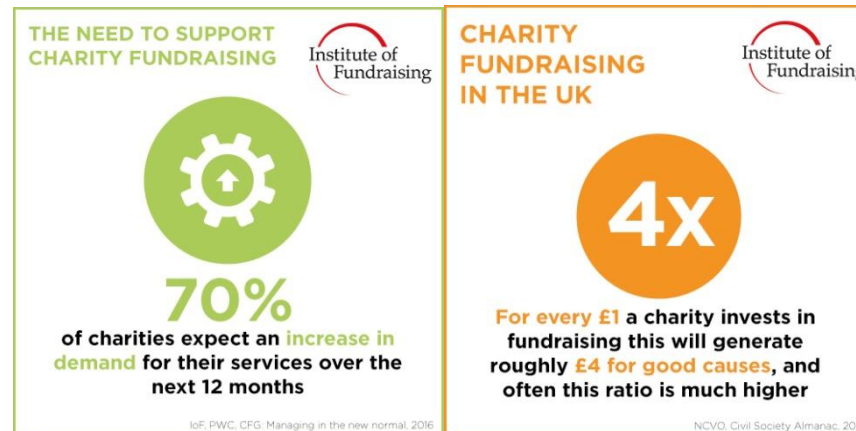
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# Start with why

1. 8 out of 10 people agree that charities play a vital role in their local community.
2. The charity sector spends £1,578 **every second** improving lives in the UK and abroad
3. 2.9bn hours are given by volunteers and over £9.6bn was donated by the British public in 2015



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## **...this wouldn't happen without fundraising**

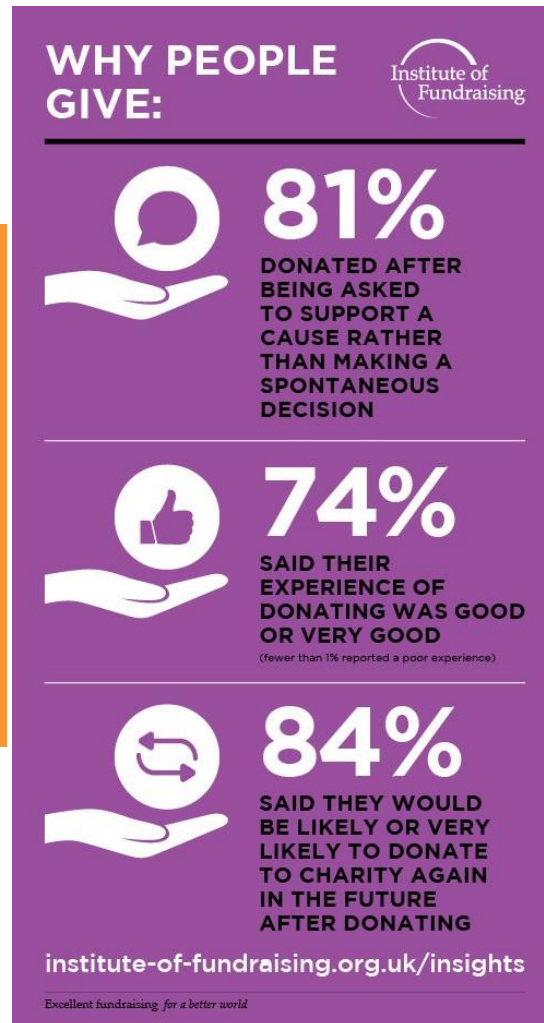
Fundraisers are saving lives

Fundraisers are making the world a safer, cleaner, and more healthy place

Fundraisers bring us art & culture and a sense of community, history, and heritage

Fundraisers are caring for the most vulnerable communities and individuals

# Fundraising is good....for the donor!



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## **Which means how we raise that money, is as important as what we do with it**

Need an effective regulatory framework which builds public trust and confidence and holds

High standards for fundraising practice that supports raising money in a safe way to deliver long-term sustainable income

Each and every organisation and fundraiser taking responsibility

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## **But the rules and regulations can't do everything for you**

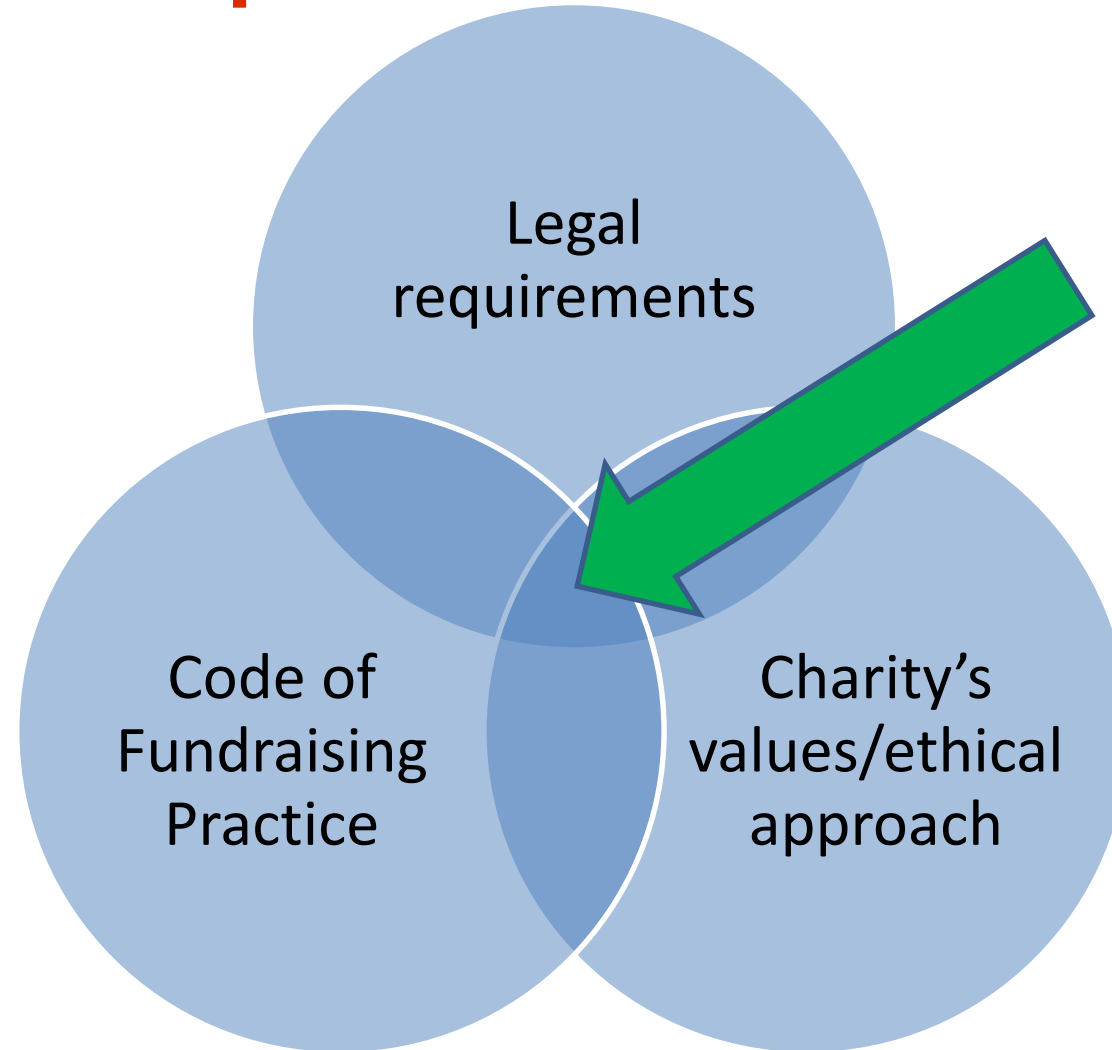
...there are some areas which Regulation can't reach- can minimise some risks, but can't eliminate risk.

The 'rules' won't always give you an answer for every situation. You will have to use your judgment and make a decision.

Values and ethics of your charity have to be part of this

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## The sweet spot...





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## What the rules can't tell you...

- How often to contact a supporter?
- The images to use or the way you make your case
- How much to spend on fundraising materials and activities?
- What fundraising activities to do (face to face, lotteries)?
- Who to partner with? (Companies, agencies. What commission is ok?)
- How long 'consent' lasts (or your legitimate interest)?
- Scary? Sometimes! That's why it's so important to think it through. Fitting action with principles/values

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## 3 questions...

1. Your CEO comes back from a meeting and says that because of Data Protection law changes you will need to go 'opt in' for all communication next year and for you to start working on it.

What do you do?

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## 3 questions...

1. First off, check the rules and review the guidance.

Consent is required for email and SMS.

Consent or legitimate interest can be used for post or telephone (non-TPS).

Do you know what each requires and how to do them fairly and lawfully?

2. Understand your options, scenario plan, budget and assess

Should be a strategic and informed decision – not just fundraising

Decide what's right for your charity – a fully 'opt in' approach might not be best for all

3. Whichever way you go, make sure you do it right!

And don't just think about it as a 'compliance' question, what's going to raise you money and give supporters a great experience?

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# Some resources to help....

Three things to remember:

1. Not just about fundraising, it's about all processing of individual data
2. It is about legal compliance. But it isn't **only** about legal compliance
3. Consent is one lawful way of processing personal data, but not the only one
  - remember legitimate interest!



Guidance GDPR and processing data

<http://www.institute-of-fundraising.org.uk/guidance/research/gdpressentials/>

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## 3 questions...

2. Should fundraisers have to follow the same rules/standards as other sectors/companies?

Or...

Should fundraisers have to follow different/higher standards in how they fundraise?

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## 3 questions...

Fundraisers **ARE** held to a higher standard. And....rightly so.

Because 'it's legal' isn't a good enough answer.

Are we giving people the best experience of fundraising that will lead to long-term support?

There are some things where we should go further. But not on everything.

Engagement with Fundraising Regulator is essential

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## 3 questions...

3. There's so much going on, what should I be doing now?

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## What can you be doing now...

- Talk to your trustees and colleagues. What plans do you have in place? Who's leading?
- Get ready for GDPR - check your direct marketing and privacy statements – do you have consent or are you relying on legitimate interest?
- Get the right policies in place – internally and with any partners
- Training and support for staff and volunteers (not just fundraisers)
- Seek external help if and when you need it
- Take responsibility and control
- Think like a regulator – ask yourselves the tough questions and show your working
- Involve your supporters: test materials and ask for feedback – how are you measuring experience and satisfaction, not just counting the money? Are you getting complaints?



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Don't let  
everything be  
about compliance!

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# Don't let everything be about compliance!

## Fundraising is fun and giving is good

- Almost 9 in 10 people (89%) did something charitable last year, a 10% increase on 2015's 79%
- More than half of the population donated money (61%) (CAF UK GIVING 2017)

Remember what inspires people:  
telling stories, making connections,  
connecting people with causes they care about

74% of people rate their experience of donating  
as good or very good (fewer than 1% say bad!)



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### **GOOD ASKING:** THE ROLE OF RESEARCH IN EFFICIENT, EFFECTIVE & ENJOYABLE FUNDRAISING

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A report by Dr. Beth Breeze

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Excellent fundraising for a better world

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# Some resources to help

- Fundraising Regulator - <https://www.fundraisingregulator.org.uk/code-of-fundraising-practice/code-of-fundraising-practice/>

