

# Fundraising Policy

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## Purpose

This Fundraising Policy (**Policy**) sets out the guiding principles of SVA's fundraising activity. We care about the communities and people we work with and strongly believe it is important to be ethical, transparent, accountable and professional in our conduct of all fundraising activities. The purpose of this Policy is to ensure that SVA adopts and follows ethical fundraising practices.

## Principles

This Policy includes all fundraising activity undertaken by SVA.

### How we fundraise

SVA is committed to respectful relationships, ethical conduct, transparency regarding donated funds, data integrity and privacy. We hold current fundraising licences to fundraise across all Australian State and Territory jurisdictions and meet all reporting requirements for these licences.

Our fundraising team is comprised of skilled fundraisers, genuinely connected to SVA's work and impact. We seek to:

- Respect funders needs and preferences
- Create long term, impactful partnerships
- Clearly articulate funding needs and intended use of gifts, including, but not limited to donations, bequests or endowments of money, real estate, personal property, securities and (in-kind (pro-bono) services
- Avoid intimidation, harassment or pressure when conducting fundraising activities
- Keep philanthropic funders up to date on impact and SVA news
- Respect the privacy of beneficiaries and seek the appropriate permissions when sharing stories
- Ensure appropriate contracts are in place when working with third party fundraisers and consultants
- Be transparent about fundraising costs
- Provide timely responses to contact from donors
- Provide receipts for all donations in a timely manner
- Welcome and respond to feedback in an open and positive way
- Continue to evolve our activities in line with industry best practice
- Respect the privacy of our supporters

SVA may solicit gifts through conversations with supporters, applications and proposals, appeals (including email, direct mail and face to face fundraising), events, social media and through community and third-party fundraisers.

## **Gift Acceptance**

SVA accepts gifts from:

- Individuals
- Companies
- Corporate foundations
- Philanthropic trusts and foundations
- Estates
- Government

SVA's Gift Acceptance Policy is separately available. The latter policy should be read in conjunction with this Policy.

## **Gift Allocation**

SVA raises funds to support social impact activities and projects across our business. This includes work across our Consulting, Impact Investing, Policy and Advocacy and Programs teams. In addition, SVA fundraises for discretionary funding to support the costs associated with conducting business.

Gifts over \$50,000 and donations relating to a specific appeal may be allocated to a particular SVA program or activity, if requested by or agreed with the funder or specified by SVA. Subject to mutual agreement between the funder and SVA, or if specified by SVA in an appeal, gifts may be directed to multiple activities and may include a contribution towards discretionary funding.

On specific projects, SVA may fundraise as the intermediary in a multi-partner project. In these instances, some or all funding may be directed to other project partners. These partners will hold DGR (Deductible Gift Recipient) status and prior agreement regarding funding allocation will be reached with donors.

## **Gift Refusal**

SVA may refuse a gift. The decision to refuse a donation will be made by the Director, Philanthropy and Partnerships or the CEO. SVA may refuse a gift at our discretion. We will not accept gifts if:

- Expectations regarding the donation do not align with SVA values, purpose and conduct
- We assess that the funder is potentially vulnerable or is at risk of not being able to make an informed decision regarding the gift
- Conditions regarding the donation are not realistic or achievable
- It is believed or understood that the gift comes from illegal activity
- Accepting the donation places SVA at risk of adverse legal action and/or disrepute
- The gift will not cover the cost of the intended project or piece of work and SVA is unable to secure further funding to support the activity
  
- Specifically, SVA will not accept gifts from individuals, groups or organisations that are involved in:
  - Causing significant negative impact on disadvantaged communities in Australia, or significantly contributing to the challenges that SVA is working to address
  - Causing significant negative impact on climate

- Selling products or services that are recognised as significantly contributing towards disadvantage in Australia
- Sex, nudity or sexual imagery, tobacco, weapons, firearms, munitions, slavery, violence and discrimination, irresponsible use or sale of alcohol (and/or drugs)
- Risks to children and young people
- High safety risks

### **Sponsorship and Cause Related Marketing**

SVA may consider entering into a sponsorship or cause related marketing partnership as part of its fundraising activities. SVA will assess each opportunity and approval will be sought from both the Director, Philanthropy and Partnerships and the Director, Marketing before proceeding (with all contractual commitments also being reviewed by SVA's Director Legal, Risk & Compliance).

SVA will not enter into any sponsorship or cause related marketing activity which might adversely affect its brand or reputation or with any organisation not aligned to SVA's purpose and values.

### **Donor Charter**

SVA is committed to respectful relationships with all philanthropic funders. A copy of the SVA Donor Charter is attached as an Annexure to this Policy.

### **Affiliations**

#### *ACNC*

SVA is a registered charity and reports annually to the Australian Charities and Not-for-profit Commission (ACNC).

#### *Philanthropy Australia*

SVA is a member of Philanthropy Australia, the national peak body for Philanthropy.

#### *FIA*

SVA is a member of Fundraising Institute of Australia, the national peak body for fundraising. We are a voluntary subscriber to the FIA Code.

#### *Community Council of Australia*

SVA is a member of Community Council of Australia, the independent member based national charity peak body.

## **Responsibilities**

It is the responsibility of SVA's fundraising team to ensure that fundraising is conducted ethically, respectfully and transparently.

### **How are individuals responsible for the success of the policy?**

- Whether an employee, contractor or consultant of SVA, we all have responsibilities to adopt the principles contained within this policy.
- Treat SVA supporters with respect
- Provide transparency regarding gifts
- Protect supporters' data and privacy

- Maintain regular agreed communication with supporters
- Meet reporting requirements agreed with supporters
- Maintain a professional conduct whilst fundraising for SVA
- Escalate any potential issues relating to fundraising or SVA supporter relationships to the Director, Philanthropy and Partnerships
- Work within the framework of the SVA Fundraising Policy and Donor Charter

### **Who is responsible for the success of the policy?**

- The Director, Philanthropy and Partnerships owns this policy.
- SVA's employs a highly skilled team of fundraisers (the Partnerships Team) who have all completed the FIA Code online training. It is their responsibility to implement this policy as part of their practice.
- The Board is responsible for approving and authorising this policy for application. Any Board members involved in fundraising activity should complete the FIA Code online training.
- The SVA Leadership Team is responsible for implementing and communicating this policy.
- It is the responsibility of the SVA Leadership Team to understand the policy and communicate it to their respective teams as appropriate.

## ANNEXURE

### Donor Charter

SVA makes the following commitments to our Donors:

#### **To use gifts effectively and ethically in line with Donor intent**

We are committed to ensuring that philanthropic gifts are managed in an efficient, effective and ethical manner for their intended purposes

In an unlikely event when it becomes impractical or impossible to carry out the expressed purpose(s), or where we reasonably believe that the original expressed wishes of our Donors are no longer a suitable and effective means of using the gift, we will communicate with our Donor (or the Donor's nominated representative) about possible alternative uses for the Donor's gift and obtaining Donors' permission and approval to an agreed alternative use and application for the gift

Discretionary gifts will be used to support the highest benevolent priorities of SVA

#### **To respect the privacy of donors**

Donors' personal information details will be treated confidentially and will not be shared with any organisation or third party outside SVA for their own purposes without express consent/permission of the Donors

Requests for Donor anonymity will be respected, honoured and confidentially enacted

Donors' names will be publicly acknowledged (in SVA's annual reviews, website, brochure etc.) unless requested by Donors to do otherwise

We will honour any request to be removed from our Donor contact list or limit the number and types of contact

We will comply with the Privacy Act, 1988 (Commonwealth) and SVA's Privacy Policy

#### **To be transparent, informative and professional**

A Donor will be informed of SVA's mission, the way we intend to use the gift and the identity of key personnel involved in the management of gifts

We will always be transparent, informative and professional in our dealings with our Donors and supporters

We will identify ourselves as employees of SVA in our dealings with our Donors

We will not pursue programs or initiatives that will compromise our Donor's preferences, motivations and best interests

We will actively provide information on SVA that is relevant to our Donors in helping to decide to make a donation subject to that information not otherwise being commercial in confidence

#### **To acknowledge and recognise Donors**

Our Donors will receive appropriate thanks, acknowledgement and recognition for their generosity.



## Related Documents

This policy should be read in conjunction with SVA's:

Privacy Policy

Gift Acceptance Policy

Whistleblower Policy

Data Breach Response Plan

Conflict of Interest Policy



## Authorisation and Document Control

### Document Status

The current status of this document is shown below.

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