



Fundraising Policy

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1. About Mental Health Reform

Mental Health Reform (MHR) is the national coalition on mental health in Ireland. MHR's membership represents a broad range of interests, including housing, disability, children's rights, human rights and ethnic minorities. MHR provides a unified voice to drive progressive reform of mental health services and supports in Ireland.

The Board of Directors are responsible for approving this policy and ensuring that it is adhered to.

2. Policy Statement

The work of MHR would not be possible without the generosity of its donors and supporters.

It is through this generosity that MHR can continue to pursue its mission to be a unifying voice that drives progressive reform of mental health services and supports in Ireland.

MHR is committed to treating all donors with respect, honesty, fairness and transparency. MHR will follow best practice in how it deals with all donations.

MHR will ensure accountability and transparency in all areas of its work so that donors and supporters have full confidence and trust in the way in which MHR operates.

3. Purpose

The purpose of this policy is to have a transparent, clear and consistent policy in relation to donations and fundraised income.

4. Scope

This policy applies to MHR Board of Directors, employees, and volunteers.

All individuals or groups who raise or accept funds on behalf of MHR have a responsibility to follow this policy.

5. Donor Charter

MHR is dedicated to best practice in fundraising and is committed to implementing the Statement of Guiding Principles for Fundraising, published by The Wheel and the Guidelines for Charitable Organisations on Fundraising from the Public published by the Charities Regulator.

6. Donation Criteria

MHR recognises the important role of donations to realising its vision and mission and achieving its goals.

MHR has clear acceptance and refusal criteria in place for donations. This approach is in keeping with best practice for charitable organisations in Ireland.

When deciding on whether to accept a donation MHR will:

- Comply with any legal or regulatory requirement;
- Have a clear pathway for persons with the authority to make decisions about donations;
- Ensure that decisions around donations accord with the vision, mission, and values of MHR;
- Provide a clear objective standard against which external regulatory bodies can judge the actions of MHR in cases of potential or actual dispute; and
- Provide a clear policy statement outlining the processes related to donation acceptance or refusal.

MHR may refuse a donation in circumstances where:

- the donation is suspected or known to be derived from the proceeds of illegal activity;
- the values of the donor, in particular for corporate donors, are not aligned with the values of MHR;
- accepting the donation might contribute to a decline in other support;
- accepting the donation risks damaging the reputation of MHR;
- accepting the donation risks damaging MHR's charitable or company status and/or membership of other organisations;
- the costs incurred in accepting the donation are greater than the value of the donation itself;
- accepting the donation is dependent upon the fulfilment of certain criteria or conditions placed upon MHR such as but not limited to:
 - a condition linked to the donation that is contrary to the objectives of MHR;
 - a condition linked to the donation that is regarded as unreasonable in relation to the resources required to fulfil same;

- a condition linked to the donation that is regarded as unreasonable or unsuitable as regards public recognition of that support;
- a condition linked to the donation will divert MHR from pursuing its current objectives, policies or work priorities;
- where the donation is dependent upon MHR first spending its own funds or resources in order to facilitate the execution of the original offer of support;
- where the donation requires complex processes to process the monies which would incur a cost that exceeds the value of the donation to MHR;
- where the donation consists of goods and services which do not align with, or fulfil, current or future organisational objectives;
- If the donation is goods, services or property which MHR cannot lawfully use, convert, exchange or sell to directly support its vision, mission, values and organisational objectives.

Donations are subject to consideration, approval and refusal, on a case-by-case basis by the Executive Director.

In the case of a donation which is, or is likely to be, in excess of €25,000, the Executive Director will be informed as soon as possible.

Any requests by a donor for the return of part of all of their donation, should be made in writing to the Executive Director.

It is the policy of MHR to issue receipts for all donations. MHR will send a receipt and, where appropriate thank you letter to the donor within five working days. Where donations are received using an online facility, donations will be acknowledged by a thank you page displayed after completion of the donation.

7. Use of Donations

Unrestricted donations are donations without any specific conditions attached. The majority of donations are unrestricted. Unrestricted donations give greater flexibility to the organisation. This income is used by MHR, for the most part, to fund its campaigning work. All donations received by MHR are treated as unrestricted income unless otherwise agreed with the donor.

Restricted donations are those donations that come with conditions. These conditions are usually that the donation is used for a specific purpose. All restricted donations will be subject to a written agreement between the donor and MHR. There are occasions where the use of a restricted donation might not be possible. For example, the ending of a project or campaign. In these circumstances, MHR will obtain the consent of the donor to use the remaining income for another purpose.

8. MHR Fundraising Committee

The Fundraising Committee is a committee established by the Board of Directors.

Membership

The Fundraising Committee consists of a minimum of four members.

Current membership are three Directors, the Executive Director, Communications and Campaigns Officer and Digital Communications & Development Officer. The Administrative and Information Assistant provides secretarial support to the committee.

The Board appoints the Chairperson and Director members. On the recommendation of the Chairperson, the Board may approve individuals with fundraising expertise to join the committee.

Committee members are appointed for a fixed term of no more than three years and no individual shall usually be eligible to serve as a committee member for more than two consecutive full terms.

The committee chairperson reports to the Board of Directors.

Responsibilities

- Identify MHR's funding requirements and develop a sustainability strategy for MHR in cooperation with the Finance and Audit Committee;
- Support the Chairman of MHR in targeting individual donors;
- Identify suitable funding opportunities through statutory bodies, grant bodies, foundations and philanthropic organisations;
- Oversee the implementation of an annual funding action plan (including activity targets) by the Executive Director;
- Monitor the funding activities and relationships with, and reporting to, funders.
- Report to the Board on fundraising performance;
- In cooperation with the MHR Finance and Audit Committee advise the Board on financial and fundraising risk.

9. Donations

Any donation perceived by a Director, employee or agent of MHR, should be presented, as soon as possible, to the Information and Administrative Assistant.

Donations and gifts to MHR directors, employees and volunteers are prohibited and will not be accepted. In addition, any person working with, for, or on behalf of MHR cannot directly and personally benefit from a benefit in kind.

MHR recognises that on occasion Directors, employees and volunteers may receive on occasion a small gift from the organisation as a recognition of work done. Examples of this include, but are not limited to, a bouquet of flowers or a box of chocolates for retiring staff or directors.

10. Gifts in Kind

A gift in kind is described as an asset that has a financial value and examples include, but are not limited to, office equipment, furniture, and clothing. The Executive Director is to be notified of the offer of gifts in kind. MHR will keep a record of any gifts in kind received.

11. Relationships with Businesses

Creating, building and maintaining working relationships and partnerships with those in the business and corporate sectors is an important part of fundraising. As such, this section should enable the Board of Directors and staff of MHR to make clear and consistent decisions regarding the creation, building and maintenance of such relationships.

MHR recognises the need to partner with such organisations that are aligned with MHR's vision, mission and values and goals. While recognising the value of business and corporate partnerships, MHR also recognises the need for transparency with such partnerships.

Creating, building and maintaining relationships with business and corporate partners is an important part of fundraising, and the fundraising strategy of MHR. These relationships may be formed through the pro-active approach by MHR or by the business or corporate approaching MHR.

For the purpose of clarity, MHR will categorise a business or corporate partnership as one which is an active, on-going and public association with an organisation which qualifies as a business, where an approach has been made by MHR or by the business to create such a partnership.

Any relationship which may exist at present, or in future, between MHR and a business which is not active, on-going or public will not be deemed to be a business or corporate partnership.

Where a business or corporate partnership is (or is likely to be) greater than €5,000 in value, this must be brought to the attention of the Executive Director as soon as possible.

Responsibility for business and corporate partnerships and all related activity rests with the Executive Director of MHR. Responsibility for elements of the partnership may be delegated to staff.

The Board of Directors will make the final decision regarding business and corporate partnerships

Business and corporate partnerships may involve, but are not limited to, activities below:

- Sponsorship of a programme/project or purpose of MHR
- Employee fundraising which is donated to MHR
- Matching employee fundraising initiatives (e.g. where employees raise €5,000 and the business matches the donation with another €5,000)
- Promotion of MHR as an organisation or a MHR campaign;
- MHR promoted by internal communications within the business;
- MHR promoted by external communications outside the business;
- Gifts in kind (e.g. office equipment, furniture, clothing, use of premises);
- Volunteering of business employees;
- Promoting the partnership by internal communications within MHR;
- Promoting the partnership by external communications outside MHR;
- Inclusion of the partnership in digital, print and traditional media; and
- Other requests which are deemed to be reasonable by both parties, and not incur expenditure by MHR which would be more than the income generated.

Assessment

An assessment will be conducted by MHR of any potential partnerships. The assessment will include the potential benefits and risks which are, or could be, associated with a partnership. The assessment may include, but not limited to, the following points:

- The financial standing and stability of the business. This may include assessing the businesses accounts;
- The past, current and projected reputation of the business. Any issues, either positive or negative, related to the public image of the business

should be considered. This should especially be considered in light of potential impact to MHR and having an association

There are some types of business which MHR does not consider for partnerships. However, exclusion of the business type is for the purpose of a business or corporate partnership. Such exclusions do not inhibit individual members of staff of such business types from making a donation to MHR.

The types of business listed below:

- Producers of alcohol;
- Producers of pharmaceuticals;
- Producers of materials or services which may be judged to be abusive of individuals or groups; be discriminatory or prejudicial, or knowingly deny or block a person's human rights;
- Producers of materials or services which may be judged to block, obstruct or contradict the work of MHR;
- Producers of pornographic content and material; producers of health related products with unsubstantiated findings or unregulated production; producers of tobacco; producers of electronic cigarettes, vaping, or producers of nicotine alternative products; producers or suppliers of materials and services which have substantial evidence of negative health impacts of such; unsubstantiated health claims, in particular mental health related claims; business operating in ways or with outputs which may be deemed to obstruct a person's health and wellbeing and access to appropriate supports.

The assessment will be completed in a timely manner as to not impede the development and progression of a potential partnerships. A timeline for the completion of the assessment should be outlined by the Board of Directors of MHR, the Fundraising Committee, or the Executive Director of MHR as applicable.

In cases where the assessment does not recommend pursuing a partnership with the organisation, or where the Board of Directors of MHR, the Fundraising Committee or the Executive Director of MHR, does not recommend pursuing a partnership, the decision should be included as a note in the assessment. The decision must be agreed upon by the relevant parties within MHR.

In cases where the assessment does recommend pursuing a partnership with the organisation, or where the Board of Directors of MHR, the Fundraising Committee or the Executive Director of MHR, does recommend pursuing a partnership, the decision should be included as a note in the assessment. The decision must be agreed upon by the relevant parties within MHR.

In the cases where the assessment has an unclear outcome about the potential partnership, the information collected should be presented to the Executive

Director, Fundraising Committee or Board of Directors of MHR as applicable for a decision to be made. The assessment should include a note about an inconclusive assessment of the business suitability for partnership, and the decision made by the relevant party.

Once a decision to not proceed with a partnership has been reached, it is the responsibility of the Executive Director to manage notifying the business, as applicable in the case where the business approaches MHR for a partnership.

Once a decision to process with the partnership has been reached, it is the responsibility of the Executive Director to manage notifying the business. There will also be a need to devise the action plan for moving forward in the creation, building and maintenance of the partnership, and outlining the applicable elements of the partnership.

Memorandum of Understanding

In all instances of a business or corporate partnership, MHR will prepare a Memorandum of Understanding (MOU) or Partnership Agreement which is to be signed by both parties. The MOU will incorporate the core elements of this policy and the agreed terms of the partnership. Items to include in the MOU should include, but is not limited to:

- The key contacts in both organisations;
- The best communication pathway for partnership related communications;
- The Board of Directors of MHR (and relevant contact information);
- What the business will offer MHR;
- What MHR will offer the business;
- The expected start date, duration, and end date of the partnership;
- The core principles of business or corporate partnerships (included below);
- Terms & Conditions by either party;
- Notice period for the review, termination or renewal of the partnership;
- Signatures by appropriate persons from both organisations;
- The signing date of the document; and
- Other information as deemed relevant by either parties.

12. Principles for Business or Corporate Partnerships

MHR will minimise the risk that a business or corporate partnership will have a negative impact on the reputation of MHR.

MHR will not allow a business or corporate partnership to influence strategic direction, programmes, projects or purposes of work. The MHR will not allow any intention of a business or corporate partner to the same.

MHR will not allow a business or corporate partnership to influence the procurement or tendering process in place, or offer any competitive advantage to the business or corporate for any procurement or tendering process.

MHR will make business and corporate partnerships known to the public through the MHR website, digital communications, social media platforms, in the MHR Annual Report, and relevant traditional media.

MHR will not create, build or maintain partnerships with a business which falls within the exclusion criteria for partnerships (as outlined above).

MHR will not create, build or maintain partnerships with a business which is not deemed be aligned with MHR's vision, mission and values or organisational goals.

MHR will undertake an on-going evaluation of the partnership and development. This is a process MHR very much welcomes the partner business to be a part of to ensure the success of the partnership.

Communications

MHR's name and or/logo must not be used without prior consultation and written agreement between MHR and the partner.

Inclusion of information related to the partnership between MHR and the business must not be used without prior consultation and written agreement between MHR and the partner.

All communications being used for traditional media, digital media, media releases (including media interviews) which refer, or may refer, to the partnership or to MHR will require prior consultation and written agreement from MHR.

In all circumstances where the partner intends to refer to the MHR in their internal or external communications, they must seek consultation and written agreement from MHR. This also includes ensuring the Brand Guidelines of MHR are being realised in any internal or external communications.

MHR is happy to work directly with the business or with their third party communications company/companies on all internal and external communications which relate to the partnership or MHR.

13. Legacy/Bequests

MHR recognises that benefactors may wish to leave a legacy to MHR. Legacy donations and bequests are a very important element of fundraising for charitable organisations. Such a gift, small or large, helps MHR plan into the future and leaves a lasting legacy of the donor.

14. References

15. Revisions