



**Summer Fields School Trust Ltd (Charity Number 309683)
Maclaren Foundation (Charity Number 1112215)**

Donor Charter

Summer Fields values the generosity of its benefactors and supporters and wishes to clearly demonstrate this with integrity and accountability.

Funds are managed through our two principal charities: Summer Fields School Trust Ltd (Charity No. 309683) and The Maclaren Foundation (Charity No. 1112215) which makes provision for the school's needs, including scholarships and bursaries.

The Governors and Headmaster of the school, the Trustees of the Maclaren Foundation and the Development Director undertake to treat all donations, gifts and bequests with the highest level of care and respect in support of the charitable aims of Summer Fields.

The charities are immensely grateful to those who support their work and, as such, we will always:

- 1) Disclose how Summer Fields intends to use the donations it receives. The school is committed to using all donations effectively
- 2) Disclose the purpose for which funds are needed during all fundraising solicitations. Printed and digital solicitations will also include contact information and the registered charity number.
- 3) Take all reasonable steps to treat donors fairly, enabling them to make an informed decision about any donation. This must include taking into account the needs of any potential donor who may be in a vulnerable circumstance or require additional care and support to make an informed decision.
- 4) Respect the privacy of all donors. All gifts and data will be processed in accordance with the school's privacy notice and relevant legislation (e.g. GDPR). Donors have the right to see their own donor record and the school will never sell data from its donor or alumni list to third parties. All alumni and donor data is held securely on the school donor database.
- 5) Process and send a prompt acknowledgement and appropriate recognition of your donation in accordance with your wishes. Where appropriate we will provide a formal Gift Agreement detailing the purpose of the gift and the payment schedule for transparency and accurate record-keeping. A copy will be held by both the Development Office and the donor.
- 6) Reclaim Gift Aid on all gifts given by UK income tax payers where a valid Gift Aid declaration is signed or made digitally. Every acknowledgement letter, where a donor has Gift Aided their donation, serves as a receipt for tax purposes. The school seeks to provide tax efficient methods of giving to the school from other countries and we are pleased to receive donations from the British Schools and Universities Foundation (BSUF) for gifts from the USA.

- 7) Ensure that all gifts we receive are in line with our Gift Acceptance Policy and undertake due diligence where necessary. The school is committed to the highest standards of integrity and **no gift will be accepted if a condition of such acceptance would compromise these fundamental principles.**
- 8) Ensure that all donations given for a specific or restricted purpose will be used solely for the purpose stipulated by the donor. Should this no longer be feasible at a future date, every effort will be made to consult the donor (or their representatives) and their wishes taken into account as to any re-direction of funds.
- 9) The Trustees and senior management of Summer Fields and the Maclaren Foundation will always invest and use all donations wisely and appropriately, acting at all times in the long-term best interest of the school.
- 10) Send prompt and honest answers to any enquiries donors may make, whether before or after making a gift.
- 11) Send donors our Donor Report, update donors periodically on the impact of their gifts and invite them to any relevant events linked to their donation.
- 12) Recognise a donor(s) gift publicly in the Donor Report with donor names listed in the Donor Report (subject to donor(s) approval – see 13). The school does not explicitly advertise the particular value of gifts given by an individual, save in exceptional circumstances and only with the consent of the donor.
- 13) Respect all requests from a donor to remain anonymous, and in such cases, not recognise the donor(s)' gift publicly. However, the school may disclose details of any donor where it is required to do so by law, by any governmental or other regulatory authority, or by order of a court.
- 14) Honour all requests from an individual or organisation requesting the school to cease or limit approaches about fundraising and supporting the school.