Charlton Park Academy
Fundraising Policy and Procedure

Date ratified: September 2026
Next Review Date: September 2027

1. Introduction

All staff members of Charlton Park Academy (CPA) are affected by and are expected to adhere to this policy.

As part of our commitment to meet the Public Sector Equality Duty (PSED) requirement to have due regard to the need to eliminate discrimination, advance equality of opportunity and foster good relations, we have carefully considered the impact of this policy on equality.

The Trust will ensure that this policy is applied fairly to all employees and does not have a negative impact on students or staff with protected characteristics; race, sex, religion and belief, sexual orientation, age, disability, gender reassignment, marriage and civil partnership and pregnancy and maternity.

This policy takes account of the 'Nolan Principles' the seven principles of public life which are the basis of ethical standards expected of public office holders:

- Selflessness
- Integrity
- Objectivity
- Accountability
- Openness
- Honesty
- Leadership

This policy is founded in the Trust's commitment to the development and maintenance of good behaviour and a positive and inclusive ethos for all members of the CPA community. It reflects our commitment to safeguard children, as well to encourage diversity in all aspects of school life.

This policy is monitored by the Audit Committee. The policy is subject to review every three years and is subject to approval by the Governing Body. It reflects the Trust's commitment to encourage and reflect diversity across all aspects of the Trust.

2. Fundraising

Fundraising is seen by CPA as a legitimate means of improving the Trust's ability to purchase goods, equipment or services.

For the public donating cash or equipment, or actively raising funds is seen as a positive way of supporting CPA.

The Governing Body is responsible for ensuring that:

- Correct procedures are in place and followed for fundraising activities
- Expenditure is properly validated
- All funds raised are properly accounted for and audited
- The money is expended in accordance with the objectives agreed with the fundraisers.

3. Permitted Use and Destination of Raised Funds

All funds raised through class-based or academy-wide initiatives must have a pre-defined, specific purpose that directly benefits the pupils or supports a registered charity. Fundraisers must never be launched to cover general, unspecified academy deficits.

3.1 Approved Destinations for Funds

Fundraising activities must fall into one of the following three categories:

- **Academy Enrichment (The 'Extras'):** Funds raised to provide resources, experiences, or equipment that sit outside the state-funded budget. Examples include:
    - Subsidizing the cost of optional residential trips to lower the barrier for disadvantaged pupils.
    - Purchasing non-essential playground equipment, extracurricular sports kits, or specialized lunchtime club resources.
    - Funding class rewards, end-of-year leavers' events, or minor classroom enhancements (e.g., a class aquarium or comfort seating).
- **External Registered Charities:** Funds collected on behalf of local, national, or international disaster relief funds and registered charities (e.g., Children in Need, local food banks). The charity's registration number must be verified by the Finance Office before the event.

3.2 Prohibited Uses of Funds

Academy trusts are publicly funded institutions. To maintain strict financial regularity, fundraising revenue **cannot** be used for:

- **Statutory Core Provision:** Essential classroom furniture, mandatory teacher resources, standard IT hardware required for the curriculum, or essential building maintenance.
- **Staff Remuneration:** Salaries, overtime, bonuses, or staff gifts.
- **Political or Non-Charitable Causes:** Campaigns, organizations, or pressure groups that do not hold active registered charity status or align with the trust's objective educational values.

4. Approval of Fundraising

Fundraising activities will be recognised as long as they are generally within the strategic direction of the Trust's. Fundraising by staff must be approved in advance. Other fundraising by external bodies will be recognised, although such bodies will be encouraged to advise the Trust of their intentions and be guided by the Trust.

In the event that funds are raised or donated to the Trust for purposes outside the improvement plan, the Trust may decline to accept the donation, but would encourage the donor/organiser to allow the donation to be used for more appropriate purposes.

5. Approval for Funding

All fundraising by Trust staff (including student based activities) must be approved before it commences, according to the following criteria:

All fundraising inside (e.g. sale of donated goods) or outside the school, (e.g. collections outside school premises, appeals to the media or industry), must be approved by the Accounting Officer regardless of the sum involved. The Accounting

Officer will report such approvals to the Governing Body.

In the event a member of Trust staff becomes aware of an external body fundraising on behalf of the Trust, they should notify the Accounting Officer so that the fundraising can be approved (if this has not already occurred) and the Trust can formally accept the donation.

Submissions for approval of fundraising (whether by members of staff or external bodies) should include the following detail:

- Scheme for which funds are to be raised
- How the funds will be raised (collections, raffles, appeal, etc.)
- Cost of the scheme
- Proposed source of funding if any cost additional to that covered by fundraising
- For equipment; proposed source of eventual replacement and timescale
- Any necessary Risk Assessments carried out
- Timescale
- Insurance

Class enterprise projects linked to curriculum objectives may fall outside the remit of this policy, however staff should talk to the Accounting Officer to ensure Trust financial procedures are maintained. This will apply to small scale fundraising ventures, e.g. Support for an external charity (see Donations to Charity Policy).

6. Funds

- All staff or volunteers carrying out fundraising activities are expected to act with fairness, honesty, integrity and openness.
- All funds received must be given to the Finance Office to be recorded, counted and banked in line with the Trust's financial regulations
- Fundraisers must not exploit their position for personal gain.
- Fundraisers shall adhere to all policies and procedures adopted by the Governing Body. Donors have the right to obtain complete and timely information on how their funds are used.
- All funds raised will be used for the purpose for which they were raised and within a set timeframe.
- In case of a cancellation of event; donors will be informed and they must agree to a change of use of funds or change of timescale or return to donor.
- Publicity and promotional activities are to be truthful and non-deceptive with a clear statement of use.

This Fundraising Policy represents a commitment to the highest standards of good practice and ensures that all fundraising activities are open, legal and fair.

Anyone having concerns regarding the Trust's fundraising schemes should discuss these initially with the Chief Financial Officer. The Chief Financial Officer will report regularly to the Accounting Officer and the Governing Body regarding all fundraising issues.

7. Related Policy

- CPA Financial Policy and Procedures