DONOR CHARTER

It is with your support that the University is able to continue to provide an outstanding education to students and to undertake world-leading research. As a valued partner in our work, we are committed to treating you with the highest level of care and respect.

This charter underpins our commitment to you and the professional standards you can expect from University of Reading staff. It also explains how you can provide us with feedback so that we may identify ways in which we can continually improve the services we offer.

Donor rights

All fundraising solicitations by, or on behalf of, the University of Reading will disclose the University's name and purpose for which the funds are requested. Printed solicitations (however transmitted) will also include its address or other contact information.

Donor entitlements

All donors and prospective donors are entitled to the following, promptly, upon request:

- The most recent University annual report and financial statements
- Confirmation of the exempt educational charitable status of the University of Reading
- A copy of our Ethical Fundraising Policy;
- Confirmation of whether an individual soliciting funds on behalf of the University is a volunteer, an employee or a hired fundraiser.

Donors and prospective donors will be treated with respect. If we have been so informed, we will honour requests to:

- Limit the frequency of solicitations
- Not to be solicited in a particular way, such as by telephone or post
- Receive other printed materials concerning the University.

Anonymity

The University will be transparent about gifts received, their sources and purposes. In cases where a donor wishes to remain anonymous, such anonymity will be respected for all public
purposes. The University may disclose details of any donor where it is required to do so by law, by any governmental or other regulatory authority, or by court order.

**Privacy**

The privacy of donors will be respected. Any donor records that are maintained by the University will be held in accordance with the law and as such kept confidential to the greatest extent possible. Donors have the right to see their own donor record and to challenge its accuracy.

**Donor details**

We do not sell supporter details on to third parties.

**Reasonable persuasion**

The University will not put individuals under undue pressure to give, although in carrying out fundraising activity in accordance with this policy it may use reasonable persuasion to encourage prospective donors or legators to donate to support its work.

**Third parties**

If the University is working with an independent third party organisation or individual as a “professional fundraiser” to solicit philanthropic gifts on its behalf, the arrangement will be subject to the relevant legal requirements and a ‘written agreement’.

They will be required to disclose their status as a third party fundraiser to prospective donors before soliciting donations. Third party fundraisers will be required to operate in accordance with this donor charter.

Third party fundraisers will not be paid by commission other than in exceptional circumstances and where the conditions set out in the Institute of Fundraising Code of Practice have been met.

**Legal advice**

Donors are encouraged to seek independent legal and/or financial advice if the University has any reason to believe that the proposed gift might significantly affect the donor’s financial position, taxable income or relationship with other family members. The University is unable to, and will not, give legal or financial advice.

**Data protection**

The University of Reading is committed to protecting the rights and privacy of individuals in accordance with the Data Protection Act 1998 (DPA). The University needs to process certain personal data about staff, students and supporters in order to fulfil its purpose and to meet its legal obligations to funding bodies and the government. The University will process such information according to the Data Protection Principles that are set out in the DPA. To ensure that all staff, students, and others who process personal data on behalf of the University are doing so in accordance with these principles at all times, the University has developed a Data Protection policy together with a series of detailed guidelines, the Data Protection Policy Guidelines. For
more information please visit The Information Management and Policy Services webpages. Click to view the Alumni and Supporter Engagement Office’s privacy policy.

Reputation
The legal and reputational rights of potential donors will always be considered as part of the due diligence process applied to potential gifts to the University of Reading. A clear distinction will be drawn between what is rumour or speculation, and what is confirmed fact or legal finding. However, potential donors must be aware that the University has the right to consider any potential reputational risks that may result from the current or past public perception of said donor. The University ultimately has the absolute right to determine a potential gift as unacceptable according to this consideration and to refuse or return it.

Copyright or intellectual property issues
Where donors wish to place conditions on gifts, for example relating to copyright or intellectual property issues, it must be ensured that the conditions are appropriate, clear and that the University can comply with any associated requirements. In some circumstances, we may not be able to accept a gift as a philanthropic donation and it may be more appropriate to refer the donor to the University’s Research & Enterprise Services.

Conditions on a gift
Where a donor offers to make a donation with conditions attached, the University reserves the right to make the final decision on acceptance or refusal of the gift. Any gift with attached conditions that contravene the University’s vision and strategic aims, or which the University cannot otherwise meet, will not be accepted.

Additional costs
Any additional costs associated with the acceptance of a gift need to be clearly identified and agreed with the donor. The University reserves the right to not accept a gift if the additional costs to the University outweigh the potential benefit of the gift.

Gift Administration Document
For a major gift to be accepted by the University, the donor may be required to sign a document which sets out the administration of the gift. A copy will be held by both the University and the donor. This document should detail how the gift will be used and the payment schedule.

The University's right over the gift
The University has the right to use the gift in the way stipulated by the document signed at the time the gift is made. If necessary, alternative uses of restricted/designated philanthropic donations due to programme, organisational, legal or regulatory changes will be discussed with the donor or their legal designate(s). If the donor is deceased or legally incompetent and the University is unable to contact a legal designate, the donation will be used in a manner that is as consistent as possible with the donor’s original intent. If necessary, the matter will be referred to the University’s Fundraising Ethics Committee.
The University has the right to review and reconsider any previous decisions made by the Fundraising Ethics Committee upon the availability of new information concerning the donor or the gift.

**Vulnerable donors**

Fundraisers will take all reasonable steps to treat a donor 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.

If a fundraiser believes the person they are working with to be in a vulnerable circumstance or that they may require additional care and support to make an informed decision, they should inform their line manager who will then follow up with the appropriate body of the University to make a decision on whether this person should or should not be solicited.

**Stewardship and reporting**

Donors can expect to be thanked and recognised for their gift. Where appropriate, donors will be offered opportunities for continuing engagement with the activities they have funded. However, donors will not receive any preferential treatment in respect of the University’s academic activities or business affairs. In particular, no donation shall lead to any departure from standard policies and procedures in respect of the recruitment and admission of students, the appointment or promotion of staff, procurement, or governance and management (including the governance and management of any activity or facility funded by a donation).

The University will provide all donors with a general report on their contribution to the institution’s goals. It will also comply with any specified reporting requirements in a timely and honest manner.

**Complaints**

The University will acknowledge complaints by a donor or prospective donor about any matter that is addressed in this document within 5 working days, and will aim to resolve a complaint within 21 working days. A designated member of the Alumni and Supporter Engagement Office will consider and attempt to satisfy the complainant’s concerns in the first instance. A complainant who remains dissatisfied will be informed that s/he may appeal in writing to the Secretary of the University of Reading, and will be advised of the disposition of the appeal.