EFG Fundraising Policy

Version 1: Last reviewed and adopted by the Trustees on 1 November 2026.

The current version of this policy is available at https://exoticferngroup.org/values.

1. Purpose

The Exotic Fern Group (EFG) may undertake fundraising to generate income to support its charitable objects.

Fundraising is a means of supporting the EFG's charitable work and is not an end in itself. All funds raised by or on behalf of the EFG must be used to further the charity's objects, subject to any specific restriction properly placed on a donation or fundraising appeal.

The EFG's Constitution requires the income and property of the CIO to be applied solely towards the promotion of its objects.

2. Principles

The EFG will conduct its fundraising in a way that is:

- legal, open, honest and respectful;
- consistent with the EFG's Constitution, Code of Conduct and values;
- in the best interests of the charity;
- clear about the purpose for which money is being raised;
- respectful of donors and members of the public; and
- subject to appropriate financial controls and Trustee oversight.

The EFG will follow the Code of Fundraising Practice and have regard to relevant Charity Commission guidance.

No person should be placed under undue pressure to donate or otherwise support the EFG.

3. Responsibility and approval

The Trustees have overall responsibility for the EFG's fundraising. This is consistent with their responsibility under the Constitution to manage the affairs of the charity and exercise its powers in furtherance of its purposes.

Under authority delegated by the Trustees, the Development Team develops the EFG's fundraising strategy and identifies opportunities for grants, sponsorship, donations and other support. Proposals that require Trustee approval are referred to the Trustees in accordance with the Development Team's terms of reference.

Fundraising using the EFG name, identity, logo, website, online accounts or other resources must be approved by the Trustees or undertaken under arrangements authorised by them.

Volunteers may undertake fundraising on behalf of the EFG where authorised to do so. They must comply with this policy, the EFG Code of Conduct and any reasonable instructions given by the Trustees.

An individual undertaking an activity in a personal capacity must not represent it as EFG fundraising unless the EFG has authorised the activity.

4. Fundraising activities

The EFG may raise funds through appropriate activities including:

- voluntary donations;
- donations through the EFG's website or other approved platforms;

- donations made for paid tiers of associate membership, on the terms set out in the EFG Terms & Conditions;
- plant sales and other fundraising at shows, plant fairs and events;
- appeals for particular projects or purposes;
- grants;
- legacies;
- sponsorship or other appropriate support from organisations; and
- other fundraising methods approved by the Trustees.

Fundraising activities should be proportionate to the likely benefit, taking account of costs, volunteer resources and any financial, legal, ethical or reputational risks.

Where fundraising takes place alongside EFG's educational or public-engagement activities, the wider charitable benefit of the activity may also be taken into account.

Participation in shows, plant fairs and other events is governed by the EFG Trips, Visits and Events Policy.

5. Donations and restricted funds

Where donations are made or sought for the EFG's charitable work generally, the Trustees may apply those funds to any activity which furthers the EFG's objects.

Where the EFG raises funds specifically for a particular purpose or project, any resulting restricted funds must be identified, recorded and used for that purpose.

Care should therefore be taken when describing the purpose of an appeal or requesting donations for a particular activity, so that the EFG does not unintentionally restrict how funds may be used.

The Trustees may refuse or return a donation where accepting or retaining it would be unlawful, contrary to the EFG's objects or policies, or otherwise not in the charity's best interests. Where appropriate, the Trustees will seek advice before making a decision about a significant or potentially problematic donation.

Where a donor is a UK taxpayer and makes a valid Gift Aid declaration, the EFG may claim Gift Aid on their donation. Declarations and claims will be handled in accordance with HMRC rules, including the rules on benefits received by donors, the EFG Terms & Conditions and the EFG Data Privacy Policy.

6. Plant sales and donated plants

Plants or other plant material may be donated to the EFG for fundraising purposes and may be sold in person at approved events, in accordance with the EFG Terms & Conditions.

Plant material offered or sold in the EFG's name must be consistent with the ethical and sustainability principles in the EFG Code of Conduct and *Towards Ethical Collections*.

The Code of Conduct requires compliance with applicable laws relating to the cultivation, transport and exchange of plant material and requires the EFG's ethical collection guidance to be followed when acquiring, exchanging, importing or exporting plant material.

Where plants or other items are donated to the EFG for fundraising, they become EFG fundraising resources and the proceeds of their sale belong to the charity.

Trustees and their connected persons may donate plants to the EFG and may buy plants at EFG sales on the same terms as members of the public. They may not sell plants or other goods to the EFG, including through an arrangement to share the proceeds of a sale, except as permitted by clause 6 of the Constitution.

7. Fundraising income, expenditure and expenses

All money raised on behalf of the EFG belongs to the charity and must be handled securely and recorded accurately.

Fundraising income must be paid into an account controlled by the EFG as soon as reasonably practicable.

Appropriate controls must be maintained over the receipt, recording and expenditure of charity funds, proportionate to the EFG's size and activities.

Fundraising expenditure must be reasonable, properly authorised and in the charity's interests.

Unless a cost falls within a budget agreed by the Trustees, volunteers are responsible for their own expenses associated with fundraising activities.

EFG may meet costs necessary for an approved fundraising activity, including event fees, payment processing charges, promotional or educational materials, or other expenditure authorised by the Trustees.

No person may deduct or reimburse their own expenses directly from fundraising income.

Detailed arrangements for financial controls, expenditure and expenses are set out in the EFG Financial Controls and Expenses Policy.

8. Donors and the public

The EFG will treat donors and potential donors fairly and respectfully.

Fundraising communications must be clear and must not deliberately mislead, exaggerate the need for funds or place unreasonable pressure on anyone to donate.

The EFG will take reasonable steps to protect people who may be in vulnerable circumstances from inappropriate fundraising approaches.

Personal information obtained through fundraising will be handled in accordance with the EFG Data Privacy Policy.

Donations, purchases and other transactions to which EFG's Terms & Conditions apply will be handled in accordance with those terms.

Any complaint or concern about EFG fundraising may be raised with the Trustees and will be considered appropriately.

9. Working with third parties

Any fundraising relationship with another organisation or person must be consistent with the EFG's charitable objects, values and interests.

The Trustees will undertake due diligence proportionate to the nature and significance of the relationship.

Where required by law or appropriate because of the nature of the arrangement, the EFG will use a written agreement and comply with requirements applying to professional fundraisers, commercial participators or other third parties.

10. Trustee oversight

The Trustees remain ultimately responsible for fundraising undertaken by or on behalf of the EFG, including fundraising carried out by volunteers or delegated to others.

Trustee oversight should be proportionate to the scale and nature of the EFG's fundraising.

The Trustees should have sufficient information to understand the charity's significant fundraising activities, income and expenditure and any material risks, problems or complaints.

Significant fundraising decisions and material issues arising from fundraising should be appropriately recorded.

11. Relationship with other EFG documents

This policy should be read alongside the current versions, where relevant, of:

- the EFG Constitution;
- the EFG Code of Conduct;
- Towards Ethical Collections;
- the EFG Trips, Visits and Events Policy;
- the EFG Financial Controls and Expenses Policy;
- the EFG Terms & Conditions; and
- the EFG Data Privacy Policy.

In the event of any inconsistency, the Constitution takes precedence.

12. Approval and review

The Trustees will review the policy at least once every two years, and following any significant change in EFG's fundraising activities, relevant law or regulatory guidance, or circumstances which indicate that the policy should be reconsidered.

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