



THE
PORTSMOUTH
GRAMMAR
SCHOOL

The PGS Donor Recognition Policy

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Introduction

This Donor Management Policy covers the following areas of activity:

1. Gift acceptance and management
2. Acknowledgment
3. Donor recognition and naming opportunities
4. Reporting
5. Stewardship (including the 1732 Society)

A grid, summarising the recognition, reporting and stewardship activities for different levels of donor, can be found at Appendix 1. This policy should be read in conjunction with the school's Ethical Fundraising and Gift Acceptance policy.

1. Gift Acceptance and Management

The Governing Body of The Portsmouth Grammar School welcomes offers of donations of all sizes, whether in connection with specific projects or to add to the school's endowment, thus enabling continuing development over the longer term.

On receipt of a gift, the details recorded in the donor's record on the PGS Development Office database will include, but are not restricted to: amount of gift, date, whether or not it is eligible for Gift Aid, purpose for which it has been given, the mechanism by which it was given, and whether or not the donor wishes to remain anonymous.

The Development Office will work with the Bursar, the Senior Management Team and the Governors to ensure the gift is used according to the reasonable wishes of the donor, subject to any unforeseen changes in circumstances, policies or needs since the gift was made.

2. Acknowledgment

The Development Office will normally acknowledge the gift by email within two working days of receipt of the gift. Where no email address is available, a letter will be sent. For gifts of £10,000 or more, the donor will receive a further communication from the Head, normally within 15 days.

3. Donor Recognition and Naming Opportunities

3.1 Bursaries

A donor will normally be given the opportunity to name a bursary if their gift is equivalent to at least 50% of full fees for the entirety of the pupil's PGS education, e.g. two years for Year 12 entry or seven years for Year 7 entry.

A gift of at least £250,000 will endow a named bursary in perpetuity.

The donor will receive a report on the sponsored pupil's progress at the end of each academic year. In these reports the bursary recipients will normally be referred to by their initials only.

3.2 Capital projects

In the case of capital projects, naming rights for the entire building should normally only be offered to donors giving at least 50% of the fundraising target. There will often be additional naming rights for lower level giving, attached to rooms or other aspects of the building. The relevant giving levels will be agreed before the start of any capital campaign.

A list of all significant donors will be displayed prominently in or close by the building for as long as the building exists. The qualifying level of donation will be agreed at the start of the fundraising campaign.

Reputational considerations

The Governing Body reserves the right to remove a donor's chosen name from any aspect of school activities should it be found to have a controversial dimension or risk damaging the reputation of the school.

4. Reporting

A list of all donors who have given to the school within the past year will be published in the annual Donor Report, excluding any donors who have requested anonymity. They may also be published on the school website, www.pgs.org.uk, and the alumni website, www.connect.pgs.org.uk

The Donor Report will provide information on projects funded or part-funded by voluntary giving in the preceding year. It will always include at least one case study of a bursary recipient or a general report on how the cohort of bursary recipients is progressing. It may also include profiles of selected donors.

The school will, from time to time, and in agreement with the donor, issue press releases detailing particular gifts to local, specialist and even national media. Such stories may also be published on the school's websites and via social media.

5. Stewardship

A comprehensive stewardship grid can be found at Annex A.

All donors will be included on the mailing list for OPUS magazine, event notifications and the annual Donor Report.

New donors will receive a Christmas card from the Development Office. These will normally be e-cards where email addresses are available. Those who have donated £10,000 or more will receive a Christmas card from the Head.

Donors who support school prizes will receive an invitation to the prizegiving celebration and a copy of the prizegiving report in the autumn term. They will also normally be invited to present the prize that they support in its inaugural year.

The 1732 Society

The 1732 Society exists to recognise and encourage both pledges to include a gift to the school in an individual's will and generous regular gifts. It has four categories of membership:

(i) Member

For those whose cumulative giving is between £1,732 and £4,999

(ii) Patron

For those whose cumulative giving is between £5,000 and £9,999

(iii) Benefactor

For those whose cumulative giving is at least £10,000

(iv) Legator

For those who have indicated they intend leaving a gift of any size to the school in their will.

There are additional categories of membership for donors whose cumulative giving exceeds £250,000 (exceptional donors) and £1,000,000. Such donors will be honoured each year during the Founder's Day service.

Individuals will automatically become members of the 1732 Society, either:

- (i) when they inform the Development Office of their intention to leave the school a gift in their will; or
- (ii) when their cumulative lifetime giving reaches £1,732. Membership may lapse after a number of years if no further gifts are received. The duration of an individual's membership will be appropriate to their previous levels of giving.

All members will be invited to at least one 1732 Society event per annum. Donors may also be invited to other events at the Head's discretion.

Appendix 1 – Summary of the recognition, reporting and stewardship activities for different levels of donor

Stewardship category	Action	First-time donors	In-year donors	Donors who support prizes	Regular donors	Members of the 1732 Society	Patrons of the 1732 Society	Benefactors of the 1732 Society	Legator members of the 1732 Society	Exceptional donors (£250,000+)	£1M+ donors
Thank you emails or letters	DD	●									
	Head							●		●	●
Christmas e-cards or cards	DD	●	●	●	●	●	●				
	Head							●	●	●	●
Donation anniversary	E-card from Development Office	●			●						
Other communication	OPUS magazine	●	●	●	●	●	●	●	●	●	●
	e-OPUS newsletter	●	●	●	●	●	●	●	●	●	●
	Event notifications	●	●	●	●	●	●	●	●	●	●
	Annual impact report	●	●	●	●	●	●	●	●	●	●
	Portmuthian						●	●	●	●	●
	Prizegiving programme			●							
Reporting and recognition	Listed in impact report		●								
	Listed on school websites		●								
	Honoured at Founder's Day service									●	●
Event invitations	1732 Society event					●	●	●	●	●	●
	Founder's Day service									●	●
	Prizegiving			●							

Appendix 2 - Safeguarding Addendum to the PGS Donor Recognition Policy

This is an addendum to the School's Safeguarding and Child Protection Policy to cover the specific safeguarding concerns relating to donors and their contact with pupils.

This addendum sets out that the school has a specific, statutory duty to protect children from coming to harm. This addendum further seeks to ensure that both donors and pupils are protected from harm, or accusations of wrongdoing.

Context

The School welcomes donations of all sizes which enable its continuing development and bursary funding and wishes to maintain and further develop its relationship with all donors.

Most donors welcome regular anonymised updates and opportunities to visit the School, attend School events, and participate in School-related activities. This policy recognises that the privacy and security of all parties should never be compromised.

It further recognises that in the case of donors who are supporting specific individual pupils, there is heightened potential for a power imbalance. Such a position of trust has the potential to create a position of power or influence over the pupil and is therefore not a relationship between equals. This position must never be abused.

Reporting a concern

Any pupil or OP who has a concern about any individual they have met through the School at any time is urged to report those concerns to the School as soon as they feel able. The School recognises that for some individuals it might be several years before they feel comfortable reporting a concern. Any concerns shared with the School will be discussed with the Designated Safeguarding Lead.

Contact between donors and pupils

The following principles guide all contact between donors and pupils within the School.

1. Donor recognition

The School's internal donor recognition policy states that any donor contributing at least 50% of school fees annually towards the School's bursary programme for at least two years will normally be given the opportunity to name their bursary. The bursary will be allocated to a specific pupil and the donor will receive at least one report per year on that pupil's progress.

The pupil will normally be referred to by their first name or initial only in these reports and care will be taken to ensure no details are included which could compromise the pupil's privacy or otherwise enable the donor to identify the individual pupil.

Donors will not be given the contact details of any current pupil.

Should any donor request additional information on any pupil, the Development Director will refer the request to the Designated Safeguarding Lead.

2. **Visiting the school site during normal school hours**

The following arrangements apply to all visitors, including donors:

- i. Where possible, donors must discuss visits to the school in advance, so that appropriate arrangements can be made.
- ii. Visitors must sign in on arrival at Reception and read the safeguarding notice.
- iii. They are required to always wear a visitor badge, clearly identifying them as a visitor.
- iv. All contact with pupils takes place in the presence and under the supervision of school staff.
- v. Adults and pupils use separate toilet facilities.

3. **Attending events outside normal school hours or on other premises used by the School**

For events taking place outside normal school hours or in other venues used by the School, some of the above protocols are harder to apply. In these situations, the following guidelines apply:

- i. All staff in attendance will be especially vigilant in observing any face-to-face contact between pupils and guests.
- ii. Separate toilets for adult guests and pupils will be made available wherever possible.
- iii. In venues where only a shared toilet space is available, action must be taken to ensure pupils and adults (including staff) do not access the facility at the same time. That is to say, a member of staff will monitor the area throughout the event and ensure:
 - a. it is free of pupils before being used by adults; and
 - b. pupils are prevented from accessing the space whilst adults are using the facility.
- iv. At events where alcohol is served, in accordance with the School's Smoking, Alcohol, Drugs and Substances Policy, staff will:
 - a. ensure pupils are not served alcohol, unless they are in the Sixth Form, it is in conjunction with a meal, and they have the express permission of a member of staff; and
 - b. refuse to serve any guest who appears inebriated.

4. **Volunteer and donor involvement in online events**

More events and networking opportunities are now being provided online and via video calls.

- i. Where such events involve pupils, a member of PGS staff will always be present.
- ii. Where virtual breakout rooms are used, all staff will have access to all breakout rooms and will move between them as appropriate, providing the 'glass in the door' as per safeguarding best practice.
- iii. Staff will make clear to pupils in advance that they should not give their contact details or other personal information to adults they do not know.
- iv. Should any volunteer offer to provide follow-up information to any pupil, this must be sent to PGS staff who will pass the information to the relevant pupil(s).

5. **The Wilkie Scholarships**

Additional arrangements are in place for recipients of the Wilkie Scholarships.

Each year Brian Wilkie, a former pupil of Mayfield School, match funds two places in Year 12 for pupils from Mayfield School via the Wilkie Scholarship scheme.

The assessment and selection process is managed by PGS staff, with the exception of a Year 10 scholarship launch assembly delivered at Mayfield School by Brian Wilkie. Scholars do have limited contact with Brian Wilkie and this is managed by PGS with the following protocols in place. Actions in paragraphs 2-4 are also applied.

- i. Scholars' parents are asked whether they consent to the identity of their child being shared with the donor.
- ii. Current scholars do not communicate with the donor via social media or email.
- iii. OP scholars have the facility to communicate with the donor via a scholars' WhatsApp group which is monitored by the Head of Mayfield School.
- iv. All meetings between the donor and the scholars are managed and attended by staff at Mayfield School or PGS.
- v. Any concern regarding this contact must be reported to the Head and/or to the Designated Safeguarding Lead of the relevant school as appropriate.

Allocation of Tasks

Task	Allocated to	When / frequency of review
Keeping the policy up to date and compliant with the law and best practice	Development Director	As required, and at least annually
Monitoring the implementation of the policy, relevant risk assessments and any action taken in response and evaluating effectiveness	Development Office	As required, and at least annually
Maintaining up to date records of all information created in relation to the policy and its implementation as required by the GDPR	Development Office	As required, and at least annually
Reviewing / receiving input from interested groups (such as pupils, staff, Parents) to consider improvements to the School's processes under the policy	Development Director	As required, and at least annually
Formal review	Development Director	Every 3 years

Version Control

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