

**CORPORATE CHARITY POLICY**

Education Authority (EA) staff wishing to coordinate a charity activity affiliated to EA must read EA’s Corporate Charity Policy before completing a Corporate Charity Activity Request Form and submit to the EA Charity Sub-Committee for consideration. This policy does not cover any individual school based charity activity, as this should be managed by schools on an individual basis.

**1.0 Introduction**

* 1. EA has a long history of charitable giving amongst staff. Research suggests that acts of giving and kindness, small and large, are associated with positive mental wellbeing. Giving to others and co-operating with them can stimulate the reward areas in the brain, creating positive feelings. Helping and working with others can also give us a sense of purpose and feelings of self-worth.
	2. Giving Back is an integral theme with EAs Health and Wellbeing strategy and continues to be endorsed by senior management.
	3. Staff are encouraged to give back as part of EA wide charity campaigns and other more localised appeals.
	4. EA has a dedicated Charity sub-committee in place to consider all corporate charity requests at defined frequency and laid out within the Policy and Protocol.
	5. The Charity sub-committee will act as a link between EA Staff and the Health and Wellbeing Champion Committee. The Health and Wellbeing Champions Committee will oversee the activity of the sub-committee.
1. **Purpose**
	1. The **high level purpose** of this policy is as follows:
		1. To empower and staff to give back effectively to charity initiatives in line with EA values. This policy will enhance EA’s corporate social responsibility activity by supporting all staff to “Give Back” for the benefit of all in the Education community and beyond.
		2. To outline the Key Governance Requirements, Assurances and Actions to be attached to all authorised charitable activities undertaken by EA staff either within EA or on behalf of EA with the aim of reducing an individual’s or the EA’s exposure to unnecessary risk.
2. **Policy Aims**

3.1 This Corporate Charity Policy aims to support staff prior to submitting a Corporate Charity Activity Request to EA’s Charity Sub-Committee for consideration.

* 1. This policy highlights EA-wide considerations, processes and controls that will be employed to ensure charitable actions are carried out with fairness and due diligence and are reflective of EA’s core values.
	2. EA Staff are invited to forward a Corporate Charity Activity Request Form to the Charity sub-committee at any stage of the year.

Please note, the Charity sub-committee aim to meet once per month to review requests.

1. **Policy Scope**

This Corporate Charity Policy and provisions within apply to all EA staff seeking to undertake charitable work, campaigns or promotions during the course of their employment. No activity should occur in work time and or on work premises without the approvals laid out in this policy.

Please note school based staff seeking to undertake charity activities within a school setting, should refer to the relevant schools existing contacts and processes.

1. **Guidelines**

The guidelines set out below by the Charity Sub-Committee are not exhaustive but aim to provide a framework in which to review and respond to all requests from staff on a case-by-case basis.

**5.1 Documentation:** All requests should be made to the Sub-Committee, using the official Corporate Charity Request Form.

**5.2 Timescales/notice:** The request to hold a charity initiative should be forwarded to

charity@eani.org.uk, normally 6 weeks before the proposed activity. This is to allow the sub-committee time to review, consider and reply to notify of the outcome of all requests within 2-4 weeks. There may at times be exceptions to this timeframe. The sub-committee may review submissions outside of this timeframe where possible.

**5.3 Governance:** All request forms must be fully completed and should include full details of the proposed beneficiary.

**5.4 Acceptable charitable organisations beneficiary / requirements**

**All charitable organisations must:**

* Be registered as an official charity <https://www.charitycommissionni.org.uk/>
* Be non-political
* Not be involved in any controversial activities or in any activity which is likely

to expose EA to criticism or cause EA reputational damage

* Not engage in any activity which contradicts anything we promote or teach in

Schools

**Any charity activity must:**

* Not contradict the NI curriculum or the EA values
* Be respectful of its audience and appeal in terms of appropriate language level, attitudes and values, maturity, contexts, and situations
* Be free from bias or other forms of stereotyping, for example, commercial, cultural, racist and sexist

The Sub-Committee may, at times, feel the requirement to liaise with other services in EA e.g. Catering, Facilities, Health and Safety or any other relevant service areas if required when considering approving a corporate charity activity request form to ensure what is being proposed is viable.

**5.5** **Risk Assessment**

* Appropriate risk assessments should be carried out in advance of any charity fundraising event/s and accompany the application for consideration by the Charity Sub-Committee. The Sub-Committee reserve the right to approve a request subject to risk assessment clearance.
* EA templates for various risks are available [here](https://www.eani.org.uk/school-management/health-safety) on the Health and Safety Section of the EA website and should be amended as appropriate. EA Health and Safety Service staff will advise on the risk assessment on request.
* The person making the risk assessment should be trained in risk assessment (EA risk assessment course or equivalent). If you wish to speak with someone in Health and Safety they can be contacted via email at EASafetyTeam@eani.org.uk or by telephoning 028 3751 2504

**5.6 Food at events:**

Fundraising events involving the distribution of foodstuffs, such as coffee mornings, in the first instance you should request the support of your local EA catering facility to assist with provision of food. We recognise on some occasion that this may not be possible. If shop bought food has to be provided, this should involve clearly labelled, with the allergens displayed, in order to minimise risks to the health and safety of participants. For further information on what to look out for on food packing and labelling please visit the [Food Standards Agency](https://www.food.gov.uk/business-guidance/packaging-and-labelling#labelling-of-prepacked-food). Information on food allergy and intolerance can be found[here](https://www.food.gov.uk/safety-hygiene/food-allergy-and-intolerance).

**5.7 Insurance Considerations:**

There is a requirement in the policy for those organising any charity activity to consult with EA Claims and Insurance on the issue of insurance who can provide advice on a case by case basis depending on the nature of the proposed activity. Please contact Margaret Doherty: margaret.doherty@eani.org.

**5.8** **Cash Handling and Recording Arrangements**

If cash donations are being received as part of a charitable activity, a record of all monies received must recorded once the final collection amount has been counted.

All monies collected as a result of charitable activity, must be counted by two EA staff and a receipt document completed and signed for records. See template at Appendix A.

All cash collected relating to charitable events, should be forwarded to the charity in which the funds are being raised, for safe retention and lodgement.

A copy the receipt should also be forwarded to EA Charity Sub-Committee via email charity@eani.org.uk for oversight and central recording.

It is important all of the above points are followed from an audit perspective.

**5.9** **Line Manager Approvals:**

Before submitting a Corporate Charity Activity Request Form to EA’s Charity Sub-Committee, EA staff are required to notify their Line Manager that they plan to submit a request to ensure any time required to facilitate the charity activity during working hours can be facilitated in line with business needs.

**5.10 Publicity Assurances:**

Requests should also include examples of any advance publicity, which should adhere to the [EA's Brand and Style Guidelines](https://sharepoint.eani.org.uk/resources/branding/Pages/default.aspx)

**5.11 Anti-Fraud**

Anyone raising or controlling EA charity funds must take appropriate action to meet their responsibility to prevent fraud as outlined in the EA fraud policy, a copy of which is available [here](https://sharepoint.eani.org.uk/pp/fraud/Pages/default.aspx)

1. **Reporting and updating requirements**
	1. Following approval relevant staff are required to report back to the Sub-Committee with an update after the event, and details of funds raised for the chosen charity. This will enable the Sub-Committee to report annually on overall charitable activity conducted across EA.

**6.2** A brief summary of the event could then be published on EA [HealthWell](https://healthwell.eani.org.uk/) and via other EA communications channels so participants and colleagues are aware of the success of the event. Written consent will be required from individuals if photographs are being used.

**6.3** Records should be kept of each fundraising event by the staff member organising – this should include date/location/title of event/organisers/amount of money raised/gifts received

**6.4** Two people should be involved in counting and recording of any income from the

fundraising event - they should sign off on the final amount raised and all cash/cheques should be banked as soon as possible after the event. For details about the process around making a deposit to a charity please contact Income@eani.org.uk

1. **Media Activity**:

EA Charity Sub-Committee should be made aware of any potential media activity associated with any planned charity activity in the Corporate Charity Request Form. If your charity activity is approved by the Sub-Committee, the EA Communications Team will then need to be notified directly of any planned media activity by emailing: comms@eani.org.uk

1. **Sub-Committee support:**

The Sub-Committee will be available to provide advice, support and guidance on queries relating to a request and can be contacted on email at charity@eani.org.uk

1. **Governance:**

Charitable activity organisers should keep the status of any affiliated charity under review and inform the Sub-Committee immediately if a charity comes under investigation by organisations such as the Charity Commissions or negative public/media scrutiny. EA retains the right to withdraw involvement and support to any affiliated charity at any given time.

**10.0 Policy and Guidelines Review**

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| **VERSION CONTROL**  |
| **DATE** | **VERSION** | **AUTHOR** | **CHANGE TYPE** |
| 15 March 2023 | 1.0 | Victoria Poole/ Aoife O’Neill  | n/a new Policy  |

**Appendix A**

**EA Charitable Activity Receipt**

**Charitable Activity:**

**Amount Raised:**

**Charity donated to:**

**Date money donated to charity:**

**EA Staff Signature 1:**

**EA Staff Signature 2:**