Charity Payroll Giving Forum – PFO Code of Practice

The purpose of this code of practice is to ensure that all Professional Fundraising Organisations (PFOs) have clear guidance on the conduct expected by the charities they are working on behalf of. This code does not replace any contractual service user agreements. Below is a non-exhaustive list of best practice recommendations.

FOR FUNDRAISERS:

1) PFOs will not act in any way that will bring the charities they are representing into disrepute.
2) PFOs will agree conditions of access with the relevant employer prior to making an approach to solicit donations to an individual, or a group of, employees and ensure appropriate identification showing the PFO name, such as a photo identity badge, is visibly worn by representatives at all times.
3) If representing multiple charities, PFOs will ensure all charities are represented in a neutral manner. In instances in which an employer has a corporate partnership in place with a particular charity, the PFO may wish to make the employee aware of this (if an incentive such as matched giving is available) but the employee should remain free to donate to the charity of their choice.
4) Donors will be provided with information about their right to terminate an agreement to donate to a charity.
5) A clear and transparent consent statement will be used by PFOs to inform donors about how their information is being processed and when and with whom information will be shared.
6) PFOs will use a clear and transparent solicitation statement when seeking and obtaining donations from donors.
7) Every effort will be made to ensure that PFOs have processes and practices in place to manage vulnerable donors. For further guidance on this please refer to "The Institute of Fundraising's Treating Donors Fairly" paper.
8) The PFO fundraiser should inform the donor of what will happen next to their pledge.
9) PFOs will ensure that donors are aware that they are free to elect to give to any UK charity of their choice and commit to not overruling an individual employee's decision as to where their donation goes.
10) Charity communications:
    a. Without making statements about how or if the donor will definitely be contacted by the charity, the fundraiser will generally present charity communications in a positive light. **Example**: "Your charity may like to get in contact to update you on how your gift is making a difference. Would you be happy to receive that kind of information?"
    b. If a donor wished to amend their communication preferences, PFOs should advise the donor to contact the relevant charity.
    c. If a donor has selected to hear from their chosen charity, they may receive carefully selected communications from their chosen charity however this is depended on varying criteria and changes from charity to charity.

d. Where appropriate a charity will send a service communication to a new donor in recognition of their gift.
e. Therefore, the PFO fundraiser should refrain from providing information about communications that could be misleading. Here are some scenario examples:

Example 1: Donor has not heard from the charity

Donor: I have not heard from my charity.
Fundraiser: You can contact your charity to update the way you would like to hear from them.

Example 2: Welcome communications

Donor: Will I receive a welcome letter?
Fundraiser: Some charities send a welcome communication to notify you that they have received information about your gift.

Example 3: Charity Contact

Donor: Will my charity contact me?
Fundraiser: You can select the way you would like your charity to communicate with you. Please read this statement and choose your preferences. You can contact your charity to amend them in future.

OTHER:

11) All parties agree that they will fully adhere to legislation, best practice and guidance on, or relevant to, Payroll Giving, including but not limited to The Charitable Deductions (Approved Schemes) Regulations 1986, the Data Protection Act 1998, the Institute of Fundraising Code of Practice and guidance from the Association of Payroll Giving Organisations and for tax relief from HMRC.
12) The use of a Charity logo, branded fundraising material and/or trademark can only be used by a PFO when an agreed contract is in place and the PFO must only use any Charity logo, branded fundraising material and/or trademark in accordance with charity instructions this includes keeping materials updated and using materials provided by the charity for the sole purpose of Payroll Giving fundraising.
13) PFOs will ensure that complaints are dealt with in a timely manner and that any complaint that relates to a named charity is provided to the Charity per the terms of contractual agreements.
14) PFOs will ensure that all information about donors is processed as soon as possible and that materials, especially completed donor forms whether paper or digital, are held securely. Appropriate measures will be taken to ensure that donor data is protected from unauthorised access or loss and that if a PFO suffers a data loss that all charities working with this organisation are promptly informed of the Data Breach.
15) When a Payroll Giving contract is terminated, the Payroll Giving organisation will return any Charity branded material and will not represent the Charity or use its logo and/or trademark from that point onwards.
16) The Charity Payroll Giving Forum will work with the PFOs and vice versa to ensure quality standards are maintained and best practice learnings are shared. Activities

such as regular mystery shopping style activities and routine monitoring will help to achieve this.

Hands on Payroll Giving

Payroll Giving in Action

STC Payroll Giving