

CODE OF CONDUCT

1. Mission.

The Association of Payroll Giving Organisations is committed to maintaining best practices within the Payroll Giving sector

2. Code of conduct

The member organisations of the Association who are the Payroll Giving Agencies (PGAs), the Professional Fundraising Organisations (PFOs) and the Payroll Donor Management Agencies (PDMAs) agree to adhere to the Code of Conduct, ensuring that all of their employees and contractors are fully conversant with its content and are committed to applying it in practice.

The Association will require its members to adhere to this Code of Conduct when engaging with all stakeholders involved in Payroll Giving, including the employer organisations and their employees, the charities and HM Revenue & Customs (HMRC).

All Members of the Association will:

- Adhere to the letter *and* spirit of this Code of Conduct.
- Adhere at all times to the legal requirements of the Charities Act 2011, and any amendments made to it from time to time, and any other regulations for Scotland and Northern Ireland in the same manner.
- Adhere at all times to the legal requirements of the Data Protection Act 1998 and any amendments made to it from time to time.
- Ensure that the Code of Conduct is fully understood by their employees and applied in practice.
- Do nothing which denigrates or brings into disrepute Payroll Giving in general or any of the members of the APGO.
- When required will cooperate with other members of the APGO in resolving any issues with employers, donors, charities or other organisations.
- Actively promote and support Payroll Giving, the Payroll Giving Quality Marks and The National Payroll Giving Excellence Awards.

PAYROLL GIVING AGENCIES

Payroll Giving Agencies (PGA's) are regulated by HMRC and they are solely responsible for ensuring that donations deducted from employee wages/salaries are paid to the nominated charities. Only the PGA's handle and manage the funds deducted. PGA's are registered charities and not-for-profit organisations and their charges are recouped either by deduction from the value of individual donations or by a charge to the employer.

Payroll Giving Agencies will:

- Pay donations to nominated charities within 35 days of receipt of the funds from the employer and the accompanying deduction information.
- Adhere at all times to the legal and statutory requirements applicable to Payroll Giving.
- Give full co-operation in transferring details of donors and charities in the event of a contract being 'switched' to another PGA.
- Work with employers, charities and other members of the APGO to increase the take up of Payroll Giving, the number of donors and the value of donations to charity.
- Exchange key statistics to enable the Association, Government, the media and charities to develop an accurate picture of Payroll Giving.
- On all single agreement companies, liaise with the relevant Professional Fundraising Organisation on any administration queries that may arise in the processing of donations.

PROFESSIONAL FUNDRAISING ORGANISATIONS

Professional Fundraising Organisations (PFO's) are funded by UK charities to promote Payroll Giving on their behalf. PFO's are paid a fee by their supporting charities only if new donors choose to give to those charities. They are engaged by employer organisations to promote and facilitate Payroll Giving donations to all charities. The PFOs do not handle or process any of the monies deducted.

Professional Fundraising Organisations will:

- Respect the Single PFO Agreement between a named PFO and an Employer.

Note – The Single Agreement is an agreement between an employer and a named PFO. This in general allows that PFO access to the employer's premises under arrangement made with local management, subject to all requirements required by the employer. All other members can request permission to promote within that company but the approach must be made at Head Office/National level.

- Ensure that their staff and any sub contracted employees, when promoting Payroll Giving:
 - Wear, at all times, in plain sight, the Identity Badge provided by the PFO which contains the statement required under the Charities Act 1992, Part 2 Section 60 (1), and, if asked, describe their role as 'representing' or 'working on behalf' of client charities

- Ensure that undue pressure is not placed upon potential donors to sign a pledge for Payroll Giving
- Not try to persuade existing donors to change their donation to another charity
- Act honestly and in a manner that does not mislead
- Not knowingly disseminate misleading or false information in the course of their professional duties
- Inform donors that payroll donations are a regular and ongoing contribution
- State that they represent their PFO and no other
- Make it clear that they are not volunteer fundraisers
- Allow donors to select ANY charity to support, even if the charity is not represented by that PFO
- Respect the wishes of a donor to remain anonymous and/or not to receive any literature or information.
- Work together willingly and respectfully to resolve any business misunderstandings or disagreements keeping conversations confidential between those involved.
- Each PFO and their fundraisers must make the solicitation statement as defined in the Charities Act 2006 before they sign any employee up to Payroll Giving (this includes online sign ups also)

PAYROLL DONOR MANAGEMENT AGENCIES

PDMA's will:

- Remain impartial and treat all commercially sensitive data, such as donor attrition rates as confidential from all third parties with the exception of the charity client.

3. The Constitution of the APGO

- To abide by the laws of England, Scotland, Wales and Northern Ireland
- To abide by the Association's formal Code of Conduct for operation of the business of Payroll Giving fundraising
- To abide by the Association's recognised standard of training for all staff employed in the operation of the business of Payroll Giving fundraising
- To adopt the procedures as laid down by the Association
- To abide by the Association's formal complaints and disciplinary procedure
- To abide by the Association's administration procedure



APGO

Association of Payroll Giving Organisations