



Institute for
Advanced Learning
& Metacognition

INSTITUTE FOR ADVANCED LEARNING AND METACOGNITION

Advancing the Science of Learning

Ethical Fundraising Policy

Policy and Principles

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Approval and Review

Approved by	Role	Date	Signature
Fabian Lord	Chair of the Board of Trustees	24 th June 2026	

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1. Purpose

The Institute for Advanced Learning and Metacognition (IALM) relies on the generosity of donors, funders and partners to advance its charitable work. We recognise that ethical fundraising is essential to maintaining public and donor trust. This policy sets out the principles and standards that govern how IALM raises funds.

2. Scope

This policy applies to all fundraising carried out by, or on behalf of, the Institute, including individual donations and legacies, grants from trusts and foundations, corporate support and sponsorship, fundraising events, and partnerships that involve funding. It applies to all trustees, employees, volunteers and any third-party fundraising on our behalf.

It does not govern the membership relationship, which is dealt with under the Membership Terms and Conditions and the Members' Charter.

3. Our commitment and standards

IALM is committed to fundraising that is legal, open, honest and respectful. In particular, we will:

- comply with all relevant legislation, including the Charities Act 2011 and data protection law, and with the standards set out in the Code of Fundraising Practice;
- act in accordance with the requirements of the Fundraising Regulator;
- be truthful in our fundraising, and never use misleading, deceptive or coercive practices;
- never place undue pressure on any person to donate, and take particular care to protect people who may be in vulnerable circumstances; and
- be clear about who we are, how donations will be used, and how supporters can stop hearing from us.

4. Accepting and refusing donations

IALM is grateful for the support it receives, but it is not obliged to accept every donation. We reserve the right to decline, or to return, a donation where:

- accepting it would be unlawful, or would breach this policy or our values;
- the source of the funds is questionable, or cannot be satisfactorily established;
- acceptance could damage the Institute's reputation, independence or relationships; or
- the conditions attached to it are incompatible with our charitable objects.

We will carry out due diligence proportionate to the size and nature of the gift or relationship: a small, unconditional donation requires little scrutiny, whereas a major gift, a corporate partnership or a gift with conditions attached requires more. Decisions to accept significant, conditional or potentially sensitive donations are referred to the Board of Trustees, and appropriate professional advice will be sought for substantial non-cash gifts or legacies.

5. Donor care, wishes and data

We will treat all donors and funders with respect, and foster open, honest and long-term relationships. We will honour the intentions of donors and, where a gift is given for a restricted purpose, use it accordingly, unless that becomes impossible or impractical, in which case we will consult the donor. We will respect donors' communication preferences and their right to remain anonymous. Personal data is handled confidentially and processed in accordance with the IALM Privacy Policy and data protection law, and we will only send marketing communications where we are permitted to do so.

6. Independence and research integrity

As a research and educational institute, our credibility depends on our independence. Funding or partnership will never be allowed to influence the conclusions of our research, the content of our educational work, or the positions we take. Funders and sponsors have no control over our analysis, findings or recommendations, and we will be transparent about who funds our work. We will withdraw from any arrangement that threatens our independence or integrity.

7. Partnerships and sponsorship

We seek partners and sponsors whose values and conduct are consistent with our mission. All significant partnerships are subject to due diligence and to the principles in this policy, and the basis of each partnership — what each party brings and gains — will be transparent. We will not allow a partner direct access to our members or contacts other than as expressly agreed.

8. Third-party fundraisers

Where we engage a third party to fundraise on our behalf, we will ensure they are required, in a written agreement, to comply with this policy, the Code of Fundraising Practice and all relevant legislation.

9. Conflicts of interest

Anyone involved in fundraising must avoid, and declare, any actual or perceived conflict of interest, in accordance with the IALM Conflicts of Interest Policy.

10. Concerns, complaints and compliance

All those who fundraise for IALM are expected to comply with this policy; breaches may be dealt with under the Institute's disciplinary arrangements or by ending a partnership. Anyone wishing to raise a concern or complaint about our fundraising may do so under the IALM Complaints Policy, and may also contact the Fundraising Regulator.

11. Responsibilities and review

The Board of Trustees holds overall responsibility for this policy and for the Institute's fundraising. This policy will be reviewed by the Board at least every two years, or sooner if required by changes in law or the Code of Fundraising Practice.