

# FUNDRAISING POLICY

## Barnsley and District u3a

### 1. Introduction

This policy is to give guidance regarding raising funds for other charities and for Bu3a. Many of our members/groups have the ability and skills to perform in public or to display their crafted goods for sale. Others may wish to support charities that have influenced their lives. Because of these skills and circumstances, they may wish to support other charities by fund raising from bu3a members. This brings them into conflict with the advice of the Third Age Trust and the statutory regulations set by the Charity Commission regarding this type of fundraising. We recognise that the restrictions may seem unreasonable in some circumstances, but the regulations are there to protect charities and their members.

### 2. The Charity Commission and Third Age Trust position regarding fundraising for other charities

- 2.1. The Charity Commission and the Third Age Trust are very clear that if a u3a (registered as a charity), or any members within that u3a, want to raise money for another charity, the Charitable Purpose of both charities must match, in all aspects, for this to happen.
- 2.2. Bu3a's charitable purpose (also called the charitable object) states: The advancement of education and, in particular, the education of older people and those retired from full-time work by all means including associated activities conducive to learning and personal development in Barnsley and the surrounding locality (Ref: Barnsley and District U3A Constitution 2020)
- 2.3. This means that to be acceptable to raise funds for another charity the two charitable purposes must match in all respects.

### 3. Principles of Acceptable Fundraising

- 3.1. Barnsley u3a does not want to prevent groups or members fundraising for other charities, but if it is done, it must be without the use of Bu3a's name or time being involved.
- 3.2. Fund raising activity can be done by a Bu3a group/member if there is no reference to Barnsley u3a or done in bu3a time.
- 3.3. Groups may choose to perform, offer their services or sell their handmade goods

but without having Bu3a banners or any indication that Bu3a is involved. Bu3a must

not be referenced in any publicity around the fundraising.

- 3.4 Bu3a has speakers from various charities on a regular basis to speak at the Monthly Members' Meetings.

These speakers can be paid expenses and allowed to display a donation bucket outside of the hall when the meeting is over.

The bucket must display clearly their charity's name without any reference to Bu3a.

- 3.5. Donations are therefore given voluntarily without any pressure from Bu3a, and it is clear for whom the monies are being raised.

- 3.6. If the donation bucket is left behind, the monies cannot be put into the Bu3a bank to be transferred later to the said charity. At no time should the monies be put through the Bu3a bank accounts. The cash must be left as it is for the charity to collect later.

- a. A speaker can ask for expenses but not for their expenses to be paid to another charity. Therefore, expenses are paid directly to the speaker or their organisation. Bu3a has a separate policy around the speaker's expenses.
- b. Expenses and fees for a speaker from another charity may be paid directly to that charity if the purpose of the speaker is the education of our members.
- c. Services obtained from another charity may be purchased directly from that charity at a commercial rate.
- d. If a speaker wishes to sell goods or otherwise raise money for their charity, the fundraising must take place outside the room in which the bu3a meeting is taking place, including during the setting up before and tidying up after the meeting.

- 3.7. At no time should photographs show the Bu3a logo when raising funds for other charities. This is confusing for the public who have donated money, considering which charity was being supported.

- 3.8. Having the Bu3a banner on view or distributing Bu3a literature while fundraising for another charity is not acceptable. Whilst it could be seen as a valuable promotion for Bu3a, it is contrary to the views expressed by the Charity Commission and the Third Age Trust.

- 3.9. Bu3a, a Bu3a group or Bu3a members can raise funds, and accept donations for the development of Bu3a. These monies should be passed to the treasurer for banking. Those raising the funds and the committee need to agree in advance how the money raised is to be used (e.g. to fund group expenditure or go into Bu3a general funds).

- 3.10. At no time should photographs show the Bu3a logo when raising funds for other charities. This is confusing for the public who have donated money, considering which charity was being supported.

- 3.11. Having the Bu3a banner on view or distributing Bu3a literature while fundraising for another charity is not acceptable. Whilst it could be seen as a valuable promotion for Bu3a, it is contrary to the views expressed by the Charity Commission and the Third Age Trust.

- 3.12. Bu3a, a Bu3a group or Bu3a members can raise funds, and accept donations for the development of Bu3a. These monies should be passed to the treasurer for banking. Those raising the funds and the committee need to agree in advance how the money raised is to be used (e.g. to fund group expenditure or go into Bu3a general funds).

- a. Many of our members, to their credit, are involved in other charitable

organisations. We advise members that Bu3a activities, meetings, and events should not be used to sell raffle tickets, admission tickets or otherwise raise money on behalf of other organisations, including charitable organisations.

- b. The reasons for this approach are:
- Some venues used by Bu3a prohibit gambling and raffle tickets are a form of gambling. We must respect this prohibition at all times.
  - Bu3a members may feel unduly obligated to buy something they would not otherwise want, when approached by another Group member. It is unfair and unreasonable for members to be potentially put in this position. This feeling of being obligated can be magnified if the person undertaking the promotion is a Group Coordinator, a Bu3a Trustee or has some formal or semi-formal role in a Group or the wider organisation.
  - In addition, it sets a precedent for an increase in fundraising which can have a negative effect on members
- c. Members who may still wish to raise money for personal charities must comply with 3.7 d above and do so outside the room where the activity is being held including during the setting up before and tidying up after the meeting.

**3.13.** Bu3a has been asked if craft groups can sell their work at Bu3a events. The answer is yes, provided any money made goes to Bu3a. Members may not make money personally out of sales at Bu3a events but can, obviously, recoup any expenses incurred on materials. Surplus monies would go to Bu3a. Claims for expenses can be made to the treasurer who will normally pay by bank transfer (the treasurer will also look after banking any surplus money). Original sales receipts for materials would be preferable, but it is understood this may not always be the case, so making a reasonable estimate is acceptable. Bu3a don't want to make this overly complicated.

Members selling crafts at non-u3a events is entirely independent of Bu3a and is between them and the tax man!

## 4. Constitution

- 4.1.** Fund raising by one charity cannot normally be done without written permission of the charity for which they are raising funds. This ensures that both charities agree that their charitable purpose/object matches exactly. Only the committee (trustees) of Bu3a are able to enter into such an agreement.
- 4.2.** Many charities focus on education as one of the objectives. The word "education" cannot exist without further clarity and must match Bu3a's charitable purpose recognising that the education provided by the charity must refer to being "...of older

people and those retired from fulltime work...” Education as a word cannot be taken out and used independently without reference to the whole object clause. The objects as an entity must match.

- 4.3. At all times when considering a charity event, the primary statement of the constitution is the charitable purpose. This cannot be overridden by any separate secondary clause.

## 5. Summary

- 5.1 Barnsley u3a groups/members can raise funds for another charity independently providing:

- the fundraising activity / event does not use or display the name or logo of bu3a
- does not express or imply any association or support by bu3a for sponsorship or fundraising
- the association with the charity has been agreed by the bu3a committee as having the same charitable purpose

- 5.2 Barnsley u3a groups/members with the ability to participate in sponsorship or fundraising for other charities:

- must do so under their own auspices
- away from bu3a activity
- including during setting up and closing of a meeting
- in venues occupied by bu3a, a neutral area may be considered to be a hallway, a separate room, a corridor or a car park as long as the fundraising does not encroach on the activities of the bu3a group
- without displaying a Barnsley u3a banner or logo and possible photographic material, and with no reference to Barnsley u3a.

Name of Policy			
Version	Description of Changes	Date	Review Date
2.0	Clarification of arrangements for fundraising for other charities.	July 2025	July 2028
2.1	Addition of Craft Groups selling at Bu3a events	October 2025	July 2028