

Introduction

1. This policy is to give guidance regarding raising funds for other charities and also for Bu3a. Many of our members/groups have the ability and skills to perform in public or to display their crafted goods for sale. Because of these skills they may be asked to support other charity raising events. 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.
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 group or members within that u3a, want to raise money for another charity, the Charitable Purpose of both charities must match, in all aspects, in order 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 fulltime 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 has to be without the use of Bu3a's name being involved.
 - 3.2. Fund raising activity can be done by a Bu3a group/member if there is no reference to Barnsley u3a.
 - 3.3. Groups may choose to perform, offer their services or sell their hand made 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.
 - 3.5. 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.

- 3.6. Donations are therefore given voluntarily without any pressure from Bu3a and it is clear for whom the monies are being raised.
- 3.7. 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 at a later date.
- 3.8. 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 speaker's expenses.
- 3.9. 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, in regard to knowing which charity was being supported.
- 3.10. Having the Bu3a banner on view, or distributing Bu3a literature while fundraising 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.
- 3.11. 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 the Bu3a general funds).

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 are in agreement that their charitable purpose/object matches exactly. Only the committee (trustees) of Bu3a are in a position 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 join another charity to raise funds for that charity providing the event does not display the name or logo of Bu3a.
- 5.2 Barnsley u3a groups/members with the ability to participate in fundraising do so under their own auspices without displaying a Barnsley u3a banner or logo and possible photographic material, and with no reference to Barnsley u3a.

Barnsley u3a	
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