



# Fundraising Policy – Version A.2

## 1. Purpose of the Policy

Our Dementia Choir is a registered charity and relies on income from fundraising and donations to sustain the Choir's performance, rehearsals and any other charity business activities.

We must ensure that by undertaking fundraising activities we uphold any legal, statutory, or regulatory requirements, and maintain our reputation and adherence to our company values.

This Policy provides guidance on how the fundraising at Our Dementia Choir will be managed to ensure that we maintain these standards and provide reassurance and transparency to our donors and sponsors of our processes.

We are registered with the Fundraising Regulator and are committed to maintaining good practice in fundraising.

This Policy will be reviewed every three years or more frequently as legislation, guidance from official bodies, or industry best practice changes.

## 2. Definitions

Our Dementia Choir fundraises through the following means:

“*Sponsorship*” is where a business provides money in order to secure the marketing and promotion of its business name, products, services, or image. Sponsorship may also include the giving of services or goods for the same in return.

A “*donation*” is a gift for which no direct benefit is sought. A donation may take various forms including cash, services, or goods, and can be from an individual or an organisation. A donor’s name or list of donors may be on display or included in publicity if Our Dementia Choir chooses to do so by way of thanks. It must be made clear to the donor that any decision to display or include the donor’s name is at the sole discretion of the Our Dementia Choir.

Our Dementia Choir is entitled to claim Gift Aid on donations from individuals where a Gift Aid Declaration is made that confirms that the individual is tax resident in the UK and has paid tax during the period in which the donation is made. Donations are not subject to VAT. (application for Gift Aid currently in process)

A “grant” is cash given to an individual or an organisation for a specific purpose. There is an obligation to fulfil any criteria the funding body may place upon the grant i.e., to ensure the project that is funded satisfies their aims and objectives and proceeds as outlined during the grant application process. Funding bodies usually require some level of profile in return for their grant and this should be in proportion to the size of the grant and agreed upon in writing before accepting the grant. This is usually in the form of a logo or line credit with agreed wording in publicity. Grants should always be documented in some form of written agreement between the parties. Grants are not subject to VAT unless we are providing goods or services in return.

### **3. Requirements**

Our Dementia Choir will only accept funds if they meet the following requirements:

**Benefit:** there are strong grounds for believing it will result in benefit to Our Dementia Choir. The benefit sought should be viewed as good value for the level of support given and the resource required to secure it.

**Integrity:** the company, organisation, partnership, or activity will not bring Our Dementia Choir into disrepute, damage our reputation or integrity, or be likely to result in loss of income.

**Strategic fit:** partnerships, activities, and the objectives of companies or organisations we work with, do not contradict Our Dementia Choir's mission, aims, and objectives.

**Independence:** donations, partnerships, or activities do not compromise our independent status.

**Influence:** there is no attempt on the part of the partner, donor, company, or organisation to influence our policy or actions either explicitly or implicitly.

**Legality:** partnerships, activities, and the wider business activities of partner companies or organisations must be, as far as we can ascertain, wholly legal under applicable law.

**Codes of Practice:** acceptance of donations, partnerships, and activities must comply with the Fundraising Regulator Code of Fundraising Practice.

**Standards:** the partnership, company, or organisation and activity must meet any appropriate and associated national or international standards and abide by any relevant regulations.

#### **4. The role of Trustees**

Final responsibility for actions under this policy rests with Our Dementia Choir's Board of Trustees, who will be able to demonstrate they act in 'the best interests of the charity'. This means trustees will not be influenced by personal moral perspectives or judgments, or derive any personal benefit from funding to the charity.

Trustees will declare a conflict of interest where it exists.

#### **5. Consideration of opportunities**

Some companies, organisations, or donors will require special consideration before funding can be accepted from them.

Funders that may be considered contentious should be discussed with the Board of Trustees before being approached.

Examples include funders that:

- have unethical practices with regard to the manufacture of their products e.g., animal welfare, and human rights.
- promote or is involved in tobacco, pornography, weaponry, or similar activities.
- are in financial or legal conflict with Our Dementia Choir.
- as far as Our Dementia Choir is aware, does not uphold the same values outlined in the charity Equality, Diversity & Inclusion Policy.

The above list is not exhaustive, and Our Dementia Choir retains the right to decline funding from any funder, which Our Dementia Choir in its sole discretion considers inappropriate.

#### **6. Authority to proceed**

All gifts (including sponsorships) should be channelled through the Chief Executive Officer to ensure they are documented and handled in line with this Policy and company procedures.

Gifts can only be accepted providing that appropriate authority for approval has been secured. The Board Scheme of Delegation should be referred to for more specific information in delegated financial authority.

The thresholds for approval are as follows:

Gifts up to £25,000 = Chief Executive approval

Gifts above £25,000 - £75,000 = Chair approval

Gifts above £75,000 = Full Board approval



All gifts should be discussed with the Executive team before being brought to the Board for approval.

## 7. Alcohol sponsorship

Organisations that produce and promote alcohol may sponsor our events, provided that the sponsorship adheres to the Portman Code of Practice on Alcohol Sponsorship available from: <http://www.portmangroup.org.uk>

This stipulates that all alcohol companies and anyone representing alcohol brands must abide by the code. The code does not apply to pouring rights agreements in their pure form, but to sponsorship benefits offered to an alcohol partner.

The code requires that alcohol companies demonstrate responsibility in promoting their products and ensure their products are only promoted to those over 18 years (therefore their brand cannot appear on anything specifically targeted at under 18, or where more than 25% of the audience is under 18 years).

They must also comply with relevant licensing legislation where sampling or sale takes place.

The guide includes a complaints procedure and provides a free advisory service by contacting [advice@portmangroup.org.uk](mailto:advice@portmangroup.org.uk) if a sponsorship needs to be discussed before acceptance.

## 8. Transparency

A copy of this policy will be displayed on our website and given to any third parties who undertake any fundraising on our behalf.

## 9. Process for Managing Corporate Sponsorship

Before a sponsorship can be secured, the following steps must be undertaken:

- **Research:** businesses approached should be researched to ensure a best fit in line with this policy.
- **Valuation:** benefits to be offered to a sponsor must be valued to ensure proposals are fair and reasonably priced.
- **Benefits:** all crediting & branding permitted must be agreed in advance based on the valuation.
- **Invoicing:** full payment should be received before the activity sponsored takes place, unless the Sponsor is embarking on a public fundraising campaign and therefore funds must be received by the charity within 3 months of receipt.



- **Contracting:** all sponsorships over £1,000 should be documented with a written contract.
- **Evaluation:** sponsors should be provided with an evaluation demonstrating return on investment after the activity.
- **Review:** sponsors should not be contracted for longer than 3 years without consideration of whether the partnership still presents best value for Our Dementia Choir.

All sponsorship is unrestricted income to the charity as a service provided in return for payment.

## 10. Process for managing Donations & Grants

When a donation or a grant is received, the Board should ensure the following:

- Clarify where the donation or grant will be spent and whether it should be treated as unrestricted or restricted funds.
- Document the gift and log any relevant details agreed such as management of the gift and activity funded, decision making for any changes to the activity supported, payment schedule etc.
- Procedure for thanking the funder, ensuring that benefits of significant financial value are not given that will conflict with this policy or significantly offset the value of the gift.

If the gift is being made by a UK resident taxpayer, undertake full documentation for possible Gift Aid claim purposes.

Our Dementia Choir needs to know the source of funds to ensure it complies with this policy.

## 11. Data Protection

Our Dementia Choir will administer all fundraising in line with its Data Protection Policy. Funders will never be given direct access to mailing lists or data held by Our Dementia Choir, unless it has the express permission of the data subject.

All funders have a right to request access to their data and may obtain this by contacting a member of the board.

Our Dementia Choir acknowledges the donor's right to privacy and will uphold the values of the Fundraising Regulator's Fundraising Promise.

Should any funder or donor wish to make a complaint about fundraising, then they may do so under the Our Dementia Choir Complaints Policy.



## **12. Gift Aid (currently in process of application)**

We will seek to maximise all donations by claiming gift aid from HMRC wherever possible. Donors will be asked for a gift aid declaration.

Claims will be made to HMRC in line with the requirements of current legislation.

## **13. Use of agencies & third parties**

On occasion, we may work with third parties, sponsorship agencies, consultants, and partners on our fundraising. Where such parties are engaged, they must also adhere to this policy.

The use of their services must be communicated to prospective donors and the value of their use must be assessed to ensure that significant Value for Money is obtained.

Ends.