



**fitmums**<sup>TM</sup>  
and friends

# Fundraising Policy

<b>Date policy agreed</b>	<b>September 2018</b>
<b>Date policy reviewed</b>	<b>March 2024</b>
<b>Date due for review</b>	<b>January 2026</b>
<b>Produced by</b>	<b>Lottie Thompson (Trustee)</b>
<b>Reviewed by</b>	<b>Board of Trustees</b>
<b>Club review dates</b>	<b>10.09.18 – 23.09.18</b>

## 1. Introduction

In line with the Code of Fundraising Practice all Fitmums and Friends fundraising activities will be; **Legal, Open, Honest** and **Respectful**.

Charitable Funds consist of:

- Money donated to the charity in appreciation
- Money left in a legacy for the benefit of the charity (or a certain part of the charity)
- Money which has been raised through fundraising events
- Money which has been donated as a result of a fundraising appeal

Charitable Funds have to be accounted for in a different way from other mainstream funding and are subject to a different set of rules and guidance. The control and management of these Charitable Funds is the responsibility of the Trustees, who as the Trust Board of Fitmums and Friends delegate responsibility to Fitmums and Friends' Management Team.

## 2. Policy Statement

Fitmums and Friends is committed to its charitable aims, and fundraises in order to promote community participation in healthy recreation by the provision of facilities for Athletics, in particular running and to provide or assist in the provision of facilities in the interests of social welfare for recreation or other leisure time occupation of individuals who have need of such facilities by reason of their youth, age infirmity or disability, financial hardship or social circumstances with the object of improving their conditions of life.

Fitmums and Friends welcomes the contribution that the charitable funds make to the delivery of its services and value the work of its sponsors who donate money Fitmums and Friends. The Trustees will ensure that the highest standards are in place for the protection of these donations.

- a) The legal principle underpinning fundraising is that all funds raised for a particular cause must be used for that particular cause.
- b) Fitmums and Friends will not denigrate other individuals or organisations.
- c) Fitmums and Friends will not exaggerate facts relating to the potential beneficiary.
- d) Fitmums and Friends will not take advantage of mistakes made by the sponsor.
- e) Fitmums and Friends will take all reasonable steps to treat a sponsor fairly, enabling them to make an informed decision about any donation. This must include taking into account the needs of any potential sponsor who may be in a vulnerable circumstance or require additional care and support to make an informed decision.
- f) Fitmums and Friends will not exploit the credulity, lack of knowledge, apparent need for care and support or vulnerable circumstance of any sponsor at any point in time.

- g) If Fitmums and Friends knows or has reasonable grounds for believing that an individual lacks capacity to make a decision to donate, a donation must not be taken.
- h) A donation given by someone who lacked capacity at the time of donating will be returned.
- i) Fitmums and Friends will not engage in fundraising which:
- j) Is an unreasonable intrusion on a person’s privacy;
- k) Is unreasonably persistent;
- l) Fitmums and Friends is registered for Gift Aid, so Gift Aid may be claimed on donations if the donor consent is given.

### 3. Fundraising by Employees, Members and Volunteers

Participation in fundraising activities by staff is voluntary and should not be imposed on individuals. The existing insurance arrangement covers the charity for certain ‘low risk’ fundraising activities, however approval must be sought from the Management Team prior to the commencement of the activity. Any event not covered by this policy must obtain its own insurance cover and be approved by Fitmums and Friends’ Management team.

### 4. Use of Donations

Fitmums and Friends operates a central Management Team that co-ordinates, administers and promotes all aspects of the charity. This operation requires financial support from all donations received to Fitmums and Friends. In support of this function, a contribution from fund raising at Club level will be applied to the processing of all funds raised which is reinvested directly back into the charitable operations of Fitmums and Friends consistently with the aims and objectives of the charity. The contribution will be 20% of all funds raised however where the amount raised is £100 or less no contribution will be required. The contribution from Club to central charity will be capped at £1000 meaning that as a maximum no more than £1000 will be claimed by the central charity. Funds will be deducted at source.

Contributions from Club fundraising events

Amount raised by Club	Contribution to central charity
£100 or less	None
More than £100	20% of total funds raised above £100 <i>e.g. £200 raised, £100 ringfenced for Club, 20% of £100 to central charity i.e. “</i>

## **General Policies Regarding Use of Donations**

On receipt, all donations should be processed through the sponsor database, which is maintained by the Management Team.

If supporters wish to make a donation to a specific area of Fitmums and Friends' work (e.g. a particular event/programme), then they make a specified donation by providing written instruction to this effect with their donation. Fitmums and Friends will always respect this. If Fitmums and Friends is unable to accept the request for the specified donation and the sponsor does not want the donation used in any other way Fitmums and Friends will refund the donation.

Fitmums and Friends in deciding whether to accept or decline a donation will consider the charity's best overall interest and will not accept donations from donors whose activities appear to be in direct conflict with our charitable aims and objectives. Fitmums and Friends will not accept any donors which:

- i. Restrict use based upon age, race, colour, sexuality or sex or any other protected characteristics.
- ii. Gifts associated with unsuitable products, corporate and individuals e.g. steroids and tobacco

Additionally Fitmums and Friends will not knowingly undertake business with companies or individuals who participate in activities which could cause detriment to the charity's reputation.

To engage a sponsor Fitmums and Friends may offer them benefits related to the size and frequency of the donation, appropriate for the organisation to be giving and proportionate to the size of the sponsorship.

## **5. Acceptable Fundraising Activities**

The proposed activity should not attract adverse publicity for the Fitmums and Friends. All events that have an added health and/or wellbeing benefit for participants are positively encouraged.

Before a fundraising activity can be initiated approval must be sought from Fitmums and Friends' Management team.

All fundraising by means of lotteries, e.g. raffles, etc. must comply with the required licensing arrangements.

All fundraising publicity must state quite clearly how the fundraising will benefit Fitmums and Friends and where further information of Fitmums and Friends fundraising policy can be located.

## **6. Guidelines for Policy Implementation**

To maximise the effectiveness and efficiencies of the services provided by Fitmums and Friends, guidelines that govern fundraising for the benefit of Fitmums and Friends are as follows:

### **a) Appeals for funds and approaches to donors**

It shall be the responsibility of the Management Team to coordinate the soliciting of funds from individuals, foundations, businesses, corporations and organisations in order to avoid an excessive number of solicitations in the name of Fitmums and Friends.

### **b) Gift processing**

It shall be the responsibility of all employees, members and volunteers to notify the Management Team when a gift over the value of £50 is received so that the gift may be recorded, acknowledgement of receipt given, and utilised.

### **c) Gift acceptance**

All gifts (appeal and non-appeal donations) must be conveyed to the Management Team at the earliest possible opportunity accompanied by all original correspondence pertaining to the gift, which will be filed by the Management Team.

### **d) Charity brand and fundraising literature**

The use of the charity brand (logo, charity name and charity number) will be agreed through the Management Team. Any literature including brochures used to attract support shall be co-ordinated through the Management Team so that the most accurate information appropriate to a particular fundraising effort is reflected.

The Clubs will be responsible for informing the central team of all planned fundraising events well in advance of the event.

### **e) Reports to sponsors**

It shall be the responsibility of all Fitmums and Friends Clubs, to compile a report on appeal donations/grants if requested by outside agencies or individual donors.

### **f) Volunteers/Children**

Whenever volunteers are to be involved in fundraising efforts extra training and information required for the fundraising activity will be given as appropriate by the organiser of the event at Branch level or by the central Charity team.

Fitmums and Friends will obtain explicit parent or guardian consent to involve children under the age of 16 in fundraising activities and will abide by any age relevant limits imposed by legislation.

#### **g) Solicitation of charitable trusts and corporates**

It shall be the responsibility of the Management Team to co-ordinate the solicitation of charitable trusts and companies. This co-ordination will ensure that an excessive solicitation of any single source of funds is avoided.

#### **h) Types of gifts**

Individuals and organisations may have several options to fulfil gift/grant commitments. The various gift types are:

- Gifts-in-kind
- Restricted grants / specified donations
- Major gifts
- Matching gift

#### **i) Donor recognition**

The Management Team will determine appropriate recognition for donors. Examples are:

- Placing the donor's name on a building
- Placing a plaque on a wall, etc.

Sponsor' names may be published in any appropriate literature and social media subject to the permission of the donor. It will be at the Management Team's discretion to inform the donor should there be a cost implication to their recognition, e.g. cost of plaque, etc.

#### **j) Gifts in memoriam**

Gifts to honour, in remembrance or otherwise recognise individuals, whether the donor is living or by bequest, will be received by the Management Team. It will be the policy of the Fitmums and Friends not only to receive such gifts but also encourage efforts to remember and honour donors.

#### **k) Legacies**

- The Management Team deals with all contracts regarding legacies.
- The Management Team will notify the Trustees of the potential legacy and seek legal advice should there be requirements around the Will/bequest.
- When the legacy money is received, this will be processed by the Management Team who will deal with all administrative arrangements including correspondence with the solicitors or family to acknowledge receipt of the monies. The Management Team will also be responsible for confirming whether any publication of the bequest is appropriate.

- All legacies will be subject to the submission of an expenditure plan to ensure that the terms of the bequest can be met within a reasonable time.

#### **l) Pledges**

Sponsors may be allowed to make pledge commitments to be paid over a specific period of time or when it is appropriate for items to be bought upon receipt.

#### **m) Donor research**

Research on donors and prospects is an acceptable and intrinsic part of fundraising. Data surrounding individuals and companies who wish to be associated with Charitable Funds will be stored in a confidential file by the Management Team. It must be stressed that any approaches undertaken by Fitmums and Friends will be handled in a sensitive and appropriate manner and comply with current data protection legislation.

#### **n) Database of donors**

Fitmums and Friends shall seek details of donors which may be used to solicit support. Requirements vary depending on the type of communication with sponsors and what information is being processed. For example, supporters need to opt-in to receiving electronic marketing communications whereas direct mail can be sent with an opt-out. The Code of Fundraising Practice sets out the key legal requirements and best practice standards for a range of fundraising techniques. Of particular note in relation to data protection are the Digital Media, Telephone Fundraising, and Direct Marketing sections of the Code, as well as the Data Protection Legal Appendices. (<https://www.fundraisingregulator.org.uk/code-of-fundraising-practice/code-of-fundraising-practice/>)

Fitmums and Friends will not retain any information on a sponsor or potential sponsor that they would not be comfortable sharing with the sponsor or prospective sponsor. Fitmums and Friends will not share or use information in a manner that the sponsor would not wish.

#### **o) Fundraising Activities**

The Code of Fundraising practice recommends that organisations adhere to the most rigorous interpretation of the law applicable to an activity. Though the Code is intended to be comprehensive, fundraising events take many forms and as such the Code may not cover every aspect of a particular event. Event organisers should contact the Institute of Fundraising for further information if this is the case.

#### **p) Outdoor Fundraising in the UK**

Fitmums and Friends will ensure that all outdoor fundraising events are delivered in a manner which ensures minimal impact on the natural environment.

### q) Fundraising Collections

Fitmums and Friends will ensure that all fundraising collection is carried out sensitively to protect the organisation's reputation in the mind of the public.

The paragraphs below include stipulations as to a fundraiser's conduct and checks and balances for the handling of the resulting funds.

### r) Face-to-Face Activity

Face to Face activity describes all forms of public engagement which is designed to initiate a lasting relationship with Fitmums and Friends. This includes face-to-face collections in addition to fundraising to solicit committed gifts by standing order and/or direct debits. Below are details the general principles Fitmums and Friends will adopt during face-to-face activity to avoid causing public nuisance or disturbance:

- Avoiding behaviour which may harm the reputation of the fundraising profession
- Terminating a conversation when a person does not wish to be engaged
- Avoiding deliberate obstruction or pursuing the public excessively (walk no more than 3 steps with a member of the public)
- Maintaining distance from shop entrances, cash points and other street features
- Avoiding members of the public who are seated or 'on duty'
- Use of "team bags" is to be discouraged.
- Fitmums and Friends fundraising staff must have clearly visible identification badges which include fundraiser's identity; contact details including telephone number and logo of Fitmums and Friends; be of sufficient font size to be readable for people with visual impairments.

#### **Additionally**

*Fitmums and Friends fundraisers must be identifiable by the public from a distance of 5 metres. Fitmums and Friends branded clothing:*

Must be visible and identifiable.

Must not be tied around waists or covered by non-charity branded clothing or other property, or in any other way be obscured.

Must be clean and in good condition to ensure legibility and brand integrity.

Must not smoke, drink alcohol or gamble while in Fitmums and Friends branded clothing.

*Fitmums and Friends will take actions to safeguard the public, including:*

Identifying and terminating conversations with potentially vulnerable members of the public

Being clearly identifiable as a charity representative through appearance

*Fitmums and Friends Fundraisers will inform the public, making explicit to potential sponsors:*

Who they work for

How the fundraiser's organisation will be paid

Length of commitment expected of the potential donor



Financial nature of the sponsor “ask”

**Note failure to adhere to the above may result in the Fundraising Regulator imposing a financial penalty on Fitmums and Friends**

## **7. Handling of Cash Donations**

Fitmums and Friends will adhere to the following good practice when handling cash donations resulting from face-to-face activities. Cash handling guidance is important for three main reasons:

1. to protect the organisation from fraud, theft or embezzlement
2. to protect staff or volunteers from accusations of dishonesty or the temptation to commit fraud
3. to assure sponsors that their donations and gifts are used for the purpose for which they were given.

## **8. Cash Handling Guidance**

- a) Cash must be collected, counted and recorded by two unrelated individuals, wherever possible. (Collection boxes must only be examined and opened by two unrelated individuals)
- b) Unsecured cash must never be left unattended or in an unattended environment.
- c) Cash must be counted in a secure environment in the presence of two individuals.
- d) Cash must be banked as soon as is practicable.
- e) Cash not banked immediately must be placed in a safe or other secure location and the Club Co-ordinator must be notified.
- f) At the earliest possible date, reconciliation must be made between cash banked and income summaries. Where practical, this must be undertaken by a person independent of the counting and cashing up of the money.

## **9. Complaints**

Fitmums and Friends will respond to all complaints from sponsors and members of the public in a timely, respectful, open and honest way in line with Fitmums and Friends Complaints policy. Complaints in relation to Fundraising will be forwarded to the Fundraising Regulator.

## Appendix 1

### Detail of Policy Reviews

Date	Reviewed by	Reason for review	Equality Impact Assessment	Club review
January 2020	Board of Trustees	Annual Review	N/A	N/A
March 2022	Tony Sutton	Annual Review	N/A	N/A
March 2024	Phoebe Broad	Annual Review	N/A	N/A