

## **Dronfield and District u3a**

### **Charity Policy Version 2.2**

**This document is available on the Policies page of the DDU3a website.**

Date Approved: 23 September 2024

Next Review Date: no later than September 2026

#### **1. Introduction**

- a. The purpose of this document is to set out the guidelines by which Dronfield and District u3a (hereafter DDU3a) will handle all aspects relating to the collection and dispersal of any monies, and any activities which may be construed as being of a charitable nature.

#### **2. Background and Objectives**

- a. DDU3a has adopted the "Model Constitution for U3A's in England and Wales" recommended for u3as by the Third Age Trust (The Trust). This includes a clause regarding DDU3a's Object (charitable purposes).
- b. The Constitution defines the 'object' (purpose) as: "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 Dronfield and surrounding District."
- c. DDU3a is a registered charity (1189224) and has adopted the rules and regulations as set out on the Charity Commission website alongside all guidance found within its own constitution. The Charity Commission and Constitution guidelines will always take priority over any additional comment contained within this policy document.
- d. The Constitution provides powers to cooperate with other charities, voluntary bodies and statutory authorities in pursuit of DDU3a's charitable purposes. To exchange information and advice with them, in particular with other u3as, clusters of u3as and The Trust. The Charity Commission guidelines require that any such action must be for a public benefit.

#### **3. Policy**

##### **a. Cooperation with Other Charities**

- i. DDU3a will consider cooperating with and supporting other charities when the purpose of any proposed activity matches its own charitable objectives as defined in the Constitution (see 2a above). Examples might be educational or academic research projects that DDU3a's Trustees consider may be of interest to its members.
- ii. DDU3a will not work with any organisations, companies or individuals whose activities appear to be in direct conflict with its charitable aims and purposes.
- iii. Additionally, DDU3a will not take part in any activities which could cause detriment to DDU3a's reputation.

##### **b. Charity Income and Collections**

- i. The income and property of DDU3a shall be applied solely for the promotion of its object.

- ii. DDU3a income includes:
  - a. Money which has been raised through subscriptions or donations.
  - b. Money which may be left in a legacy for the benefit of DDU3a.
  - c. Money which may be donated as a result of a fundraising event.
  - d. Money raised by Interest Groups.
  - e. Money received from grants eg. Local Authority, The Trust.
- iii. DDU3a property shall be any asset donated to the charity, or purchased as part of the pursuit of its aims and objectives.
- iv. DDU3a will only publicly promote events or fundraising activities which are in line with its object. Such promotions may include posters, leaflet distribution, social media or articles in DDU3a newsletters.
- v. Individual DDU3a members are allowed to mention fundraising initiatives privately to friends within DDU3a. Public announcements of fund-raising initiatives at either Monthly or Group meetings, or the use of other DDU3a communication systems e.g. Beacon, Social Media are not allowed.

#### 4. Speakers

- a. DDU3a’s Speaker Finder, Group Coordinators and any member arranging a speaker will refer to this Charity Policy when inviting a Speaker to speak at AGMs, Monthly or Interest Group meetings to avoid misunderstandings before any booking is confirmed.
- b. A Speaker’s remuneration shall be agreed in advance. Payment will always be made directly to the Speaker, not to any charity they represent.
- c. A Speaker representing a charity may not specifically ask for donations from members, nor will any announcement about donations be made by the hosts/organisers of a meeting. However, members may volunteer to make donations if they wish.

#### 5. Executive Committee Responsibilities

- a. The Executive Committee must approve the use of DDU3a’s name, property or facilities to host events, activities or similar, or as a promotional tool for the benefit of other charities.

Document History		
Date	Version Number	Summary of Changes
23 Sep 2024	2.2	Hyperlinks to DDU3a’s old website removed throughout the document. Para 3.a.1 Rephrased - reference to ‘people of the Third Age’ replaced by ‘DDU3a’s members’. Para 4.b “not to any charity they represent” added to end of sentence. Para 4.c New paragraph added, clarify that members may choose to make donations to speakers representing charities.

<b>Document History</b>		
<b>Date</b>	<b>Version Number</b>	<b>Summary of Changes</b>
Jan 2024	2.1	2c reworded to better reflect constitution. 3b(ii) d&e added. 3b(iv&v) social media added. 4a Speaker communications clarified. Previous section 5 Treasurer Responsibilities deleted as included in Finance Policy. 6 Exec Responsibilities renumbered 5 and condensed.
tbc	2.0	Policy re-written to reflect DDU3a's charity status. Roles and responsibilities of Treasurer and Executive Committee clarified. This version never formally approved. Superseded by V2.1
Oct 2018	1.0	Policy Approved