



## **National Long Term Survivors Group**

### **Fundraising Policy**

**Issue:** Version 1    **Date:** 22/03/2012

#### **A: Purpose of the Policy**

1. To define how NLTSG raises funds to support its work and help the organisation meet its mission statement.

#### **B: Principles**

1. NLTSG is aware of the need to raise additional funds to support its ongoing work with people who have been diagnosed for five or more years, as well as any other projects the organisation wishes to undertake.
2. NLTSG recognises that statutory funding for HIV is under constant threat and it cannot rely on this form of funding alone. NLTSG accepts that this means that it will have to raise funds on a routine basis rather than in an *ad hoc* way as it has done in the past.
3. NLTSG identifies three funding strands which it will need to pursue. The first is to raise funds so that people can attend its "Living Proof" weekends. The second is to fund additional weekends and events which further the organisation's objectives. The third is for general funding which the organisation can use, in whatever form is most appropriate, to further the aims of the organisation.
4. NLTSG is mindful of the need to adhere to Charity Commission guidelines in respect of fund-raising as well as its own policies, particularly those on financial management and financial support for NLTSG members.

#### **C: Definitions**

1. NLTSG defines fundraising as the undertaking of specific activities to raise funds for the organisation. These funds may be for restricted or unrestricted funds.
2. Restricted funds are those funds which have been raised for a specific purpose or project.
3. Unrestricted funds are those funds which have been raised to support, in general terms, the activities of the organisation and can be used in the most appropriate way within the general confines of the overall aims of the organisation.

#### **D: Fundraising for specific projects**

1. NLTSG may raise funds for specific projects. These funds can be to support people attend its "Living Proof" weekends. They can also be to fund other weekends and events.



2. When raising funds to support people to attend its "Living Proof" weekends, the organisation may target funding to support specific groups or demographics to attend the weekends. It may also seek funding to subsidise the cost of the weekend so that they are as accessible as possible.
3. When raising funds for other weekends and events, NLTSG will ensure that these fall within the remit of the organisation, will pursue its aims and further its mission statement.
4. Funding applications for specific projects will be for identified and evidenced needs.
5. Fundraising for specific projects can take place at any time.

### **E: Fundraising for general funding**

1. NLTSG may raise funds which are not for specific projects but are to further the aims of the organisation. This may include funds to meet administrative costs, funds to subsidise the cost of the weekend and, indirectly, to offset any losses which a specific weekend may make due to reduced attendance.
2. NLTSG will make it clear that, when raising general funding, that the purpose of the money is to further the aims of the organisation and that is not for a specific project.
3. Fundraising for general funding can only take place if the organisation identifies a need for additional funding which cannot be effectively met from the organisation's existing unrestricted funds.
4. NLTSG is aware that if it raises money for general purposes, this will be held within its unrestricted funds. As a consequence of this, NLTSG is mindful of the need to adhere to Charity Commission guidance on unrestricted reserves and its own policy on reserves.

### **F. The need for evidence-based fundraising**

1. NLTSG recognises that it can fundraise simply to raise money, and must be clear on what it intends to spend any money which it raises.
2. NLTSG will gather evidence to support any fundraising which it undertakes. This evidence may be from its own research, including evaluations, as well as research and information from other reputable sources.
3. NLTSG may also commission its own research, provided it can meet the cost without compromising the organisation's financial security.

### **G. The role of the Board of Trustees**

1. The Board of Trustees will monitor the organisation's finances so that it is aware of when it needs to undertake fundraising. The Board will routinely review the finances so that it has a good understanding of how much money is available to the



organisation, whether funds are increasing or decreasing, and the scale of any shortfall.

2. The Board will ensure that at the start of each financial year it has a budget projection for the following 12 months so that it can plan fundraising accordingly. This will be provided by the treasurer, or the treasurer's designated representative.
3. The Board will select the projects it wishes to undertake, ensuring that they meet the organisation's objectives and help it to further its mission statement.
4. The Board may appointment someone to lead fundraising projects and may also choose for form a fundraising committee. The project lead and the committee do not have to be members of the Board, and the Board will actively encourage members of the organisation to become involved.
5. The Board will ensure that funding applications for specific projects meet the cost of the project in full and do not have a negative impact on the organisation's overall financial stability.

#### **H. Record-keeping**

1. The Board will keep a record of its fundraising activities, particularly when it is successful in applying for grants. Given that the treasurer will be responsible for recording the receipt of any grants, the treasurer will take responsibility for these records.
2. The records will include the date the grant was received, the amount, the details of the organisation which gave the grant and the purpose of the grant.
3. The records will also include details of unsuccessful grants. This information should cover the name of the grant-giving organisation, the amount requested, the date the application was refused and, if known, the reasons for being declined.

#### **I. Promoting the organisation**

1. NLTSG recognises that fundraising and promotion are complementary activities, and any activity which promotes the organisation is likely to increase the effectiveness of any fundraising.
2. The Board is aware of the need to monitor and approve any promotional work and this will be lead by the Chair, who may appoint others to take on the day-to-day role while retaining oversight of the work that any representatives are doing.
3. NLTSG will actively promote the organisation through all available media (the press, Internet, email and any other appropriate platform).
4. NLTSG will actively send out press releases to notify of any events which it organises or in which it is an active participant.
5. Press releases will always include details of how to donate to the organisation.