

# Fundraising Policy & Procedures

## Introduction

Unleashed Theatre Company (UTC) is an organization whose core objectives are

- To encourage and help disadvantaged, vulnerable and deprived members of the community to help address their issues and improve their mental health.
- To provide a safe, welcoming and non-judgemental environment for members to relax, rehearse and socialise.
- To help local (primarily, though not exclusively, based in South Devon, UK) people gain skills in the arts.
- To provide local people the opportunity to showcase their skills to local audiences (through theatre) and worldwide (through films submitted to worldwide festivals and available online, as well as filmed/streamed theatre shows available online), and to create working opportunities for self-employed practitioners at all stages of their careers, in the arts or media.
- To assist in the renovation and ongoing maintenance and running of The Royal Lyceum and Arts Centre to include staff costs.

UTC applies the support it receives only for costs relating to objectives. We welcome donations (financial and in kind) and other funding from individuals, companies, local and national government and other organisations. Any and all funds received are used specifically for the sole purpose of sustaining and furthering our core objectives.

If funding cannot be used for the original purpose, due to an unforeseen change of circumstances, the funder will be contacted immediately with an alternative suggestion or the offer of a full return of the donation.

## Legal issues

Where we have proven reason to believe that we have been passed the proceeds of any crime, or money/possessions belonging to someone other than the donor, without the owner's permission, we shall contact the police or other relevant authorities, and endeavour to return the money/possessions to the original owner if proof of ownership is verified.

## Ethical fundraising

While we are most grateful for all funding, the trustees reserve the right to refuse funding if they find it is from a source which we may find unethical. We will not accept funding which is from any source, organisation or person, which we know promotes or supports negative discrimination on the basis of gender identity, race, religion, nationality, age, or disability; which has been involved in proven sexual misconduct, financial irregularity, animal abuse or testing; or which requires us to produce work of a discriminatory, political or religious bias.

## Control

The provision or obtaining of funds, in person or in kind, does not grant the donor any authority or title to act on behalf of UTC or any member thereof (like, but not limited to, 'buying a way in' as a project 'producer', or to become an owner of our intellectual property). Should that be a requirement of the donor or fundraiser, the donations thus offered may be refused.

## External Fundraisers

Occasionally, we will work with external fundraisers who may help on a voluntary or commission-basis. In any case, they are required to uphold the ideals, ethics and polices of UTC, and act within the law, and Institute of Fundraising guidelines, at all times. No part of UTC's work, or assets may be misrepresented at any time.

If applicable, project funding (partial and in full) budgets may include a minimum of Union-rate payments for its cast and crew in the project budget.

Funding for equipment or core costs must specify the specific cost/usage being applied for. Equipment will be retained by UTC, and used for future relevant projects, as long as the equipment remains in safe working conditions.

Any fundraiser working with us on commission, must ensure that:

1. If being paid on a commission basis, they work for us on 15% or less of successful fundraising located by them, as stated in contractual agreements and written discussions between themselves and UTC trustees (no claim shall be had by them against any funds not raised by the fundraiser.) This will be on a self-employed basis.
2. If the external fundraiser is being paid, they shall include this percentage fee as a clearly identified line in any such grant application, as an additional amount to the budget. No funds may be diverted 'under the table' from UTC as commission percentages, from amounts allocated by the funder for other purposes.
3. They shall clearly identify themselves by their name and/or their company, as a fundraiser assisting UTC (they will not sign feigning to be one of UTC's members or trustees).
4. All budgets and applications, and terms therein, are checked and approved by UTC's fundraising trustee and or finance trustee prior to application submission.
5. They uphold the policies, ethics, and mission of UTC; and that they act within British law, and Union (Equity, Bectu etc) best practice at all times.
6. They follow the Institute of Fundraising guidelines at all times.
7. Full communication as to grant applications drafted for approval, monies received, rejections and feedback received, must be provided to UTC trustees on a regular basis, and on demand if required.

## **Partial funding**

Usually we apply for the maximum required for a specific purpose. If a funder offers less than the applied-for amount, UTC must look to see that we can fulfil the project/ brief at that lower cost (for example by buying needed items second hand instead of new), inclusive of maintaining project outcomes, and paying actors/crew if applicable, or we may need to look into the possibilities for locating match-funding. A pared-down version of the project or purpose may need to be offered to the funder. If this cannot be managed, or the revised version is not acceptable, we commit to returning the funds provided, unused, to the funder within 28 days.

## **Gifts in kind**

UTC welcomes gifts in kind which will assist us in our work. Gifts to UTC may take a variety of forms, like, but not limited to, equipment, materials for set building, vouchers for travel, costumes, props. Any that are not suitable for our work, will be disposed of, in a manner which will raise funds for our ongoing work (eg, by sale at a car-boot sale, on eBay, or similar) and/or to support alternative creative work, with a preference to organisations the Devon area. (eg, a piece of costume that is not of use to us, will be sold to raise funds, or given to another theatre or film company in the area).

## **Publicising support**

We will acknowledge our sources of funding publicly, for instance, in social media, on our website, in production credits, in our annual report, and identify major donors unless the donor clearly states that they wish to remain anonymous.

## **Sponsorship**

UTC is happy to negotiate with any potential funders who may wish to promote their support of UTC.

UTC will then decide whether there is a net benefit to the work of accepting the support. This will require judgement, balancing these two issues:

1. Any publicity which may be negatively construed, or associates us with an organisation who does not share our values; and
2. The benefit of their potential support to the people we work with.

## **Making fundraising applications**

These will be coordinated by the Finance and Operations Manager, (in discussion with the Chief Operations Officer) and UTC trustees in administrative meetings on- or off-line. This may or may not include external fundraisers.

## **Financial procedures**

All involved in fundraising or handling of money/donations, must adhere to and comply with current legislation, our current financial procedures and general principles of good ethical practice.

## **Sustainability**

In preparing reports for approval, trustees must address the issue of what will happen with the work programme/activity at the end of the funding, namely finding ways to become self-sustaining, or re-funding, as relevant. In cases where fundraising has been used to obtain equipment, the usage of that equipment is likely to continue long term, beyond any 'report period' by the funder.

## **Other fundraising activities**

Funds or donations in kind, shall be solicited in a respectful manner and without pressure. All third parties not directly affiliated with UTC, who wish to solicit funds on behalf of the organization must obtain written permission from UTC trustees, prior to beginning any fundraising activities.

Written acknowledgement shall be issued for all donations. If the donor receives anything in exchange for their donation, such as a dinner or event admission, the acknowledgement shall clearly state this.

## **Crowdfunding**

Fundraising projects like crowdfunding, will be clear as to what rewards are available in return for contributions, and as to what will happen with the money received if only partial funding is reached. Rewards like 'buying an acting role' or 'buying a credit as a project producer' or requests for sexual imagery of cast/crew, will not be provided, as these are in direct contravention of safe & ethical theatre or film production practices, and of Equity/BECTU guidelines.

At a minimum, text credit in programmes (online and printed), and/or video credits, are available. Clear information as to when specific rewards can be expected, will be provided upfront in crowdfunding details.

## **Donor Acknowledgements**

Within 14 days of donation receipt, every donor to UTC shall receive a formal acknowledgement/thank you letter and donation receipt.

## **Donor Privacy Policy**

Any information supplied to UTC by donors will be used solely to fulfil their donation and shall not be shared for any reason unless permission is granted by the donor to share such information. All requests to remain anonymous shall be honoured.

UTC does not sell or share donor lists.

Donors who supply UTC with their postal address or email address may be contacted periodically for solicitation purposes and/or with information regarding upcoming events. Donors may request to be permanently removed from the mailing list by contacting us via email, phone or postal mail, at any time.

All requests to be removed from the UTC mailing list shall be honoured.

### **Reporting & accountability**

All funders and sponsors are welcome to request project updates at any time, and if required, at the end of the project, a written PDF document produced by the trustees of UTC, showing how the funds/items have been used, and links to images/videos of the finished work. Feedback from audiences/ participants is also available.

Any requests for specific information should be addressed to the trustees as early as possible. All data provided will adhere to the regulations of GDPR.

Funders and sponsors are most welcome to visit rehearsals/shows to see for themselves how their donations are being used. If they wish to do so, they are asked to contact the trustees for information on the venues, and times/dates, and will be provided with a variety of potential dates. They may also arrange to 'sit in' a rehearsal or show setup, using the video-conferencing software of Zoom.

The trustees of UTC reserve the right to make all written reports public on the UTC website ([www.unleashedtheatrecompany.com](http://www.unleashedtheatrecompany.com)) for transparency, and for the information of any future funders. All written reports will also be provided to all members of the project cast and crew.

**Approved:** 03.05.23  
Review Date: 03.05.24

## **The Fundraising Promise**

This promise outlines the commitment made to donors and the public by fundraising organisations such as UTC which register with the Fundraising Regulator. Those who register with the regulator agree to ensure their fundraising is legal, open, honest and respectful. The standards for fundraising are set out in the Code of Fundraising Practice.

### **We will commit to high standards**

- We will adhere to the Fundraising Code of Practice.
- We will monitor fundraisers, volunteers and third parties working with us to raise funds, to ensure that they comply with the Code of Fundraising Practice and with this Promise.
- We will comply with the law as it applies to charities and fundraising.
- We will display the Fundraising Regulator badge on our fundraising material to show we are committed to good practice.

### **We will be clear, honest and open**

- We will tell the truth and we will not exaggerate.
- We will do what we say we are going to do with donations we receive.
- We will be clear about who we are and what we do.
- We will give a clear explanation of how you can make a gift and change a regular donation.
- Where we ask a third party to fundraise on our behalf, we will make this relationship and the financial arrangement transparent.
- We will be able to explain our fundraising costs and show how they are in the best interests of our cause if challenged.
- We will ensure our complaints process is clear and easily accessible.
- We will provide clear and evidence based reasons for our decisions on complaints.

### **We will be respectful**

- We will respect your rights and privacy.
- We will not put undue pressure on you to make a gift. If you do not want to give or wish to cease giving, we will respect your decision.
- We will have a procedure for dealing with people in vulnerable circumstances and it will be available on request.
- Where the law requires, we will get your consent before we contact you to fundraise.
- If you tell us that you don't want us to contact you in a particular way we will not do so. We will work with the Telephone, Mail and Fundraising Preference Services to ensure that those who choose not to receive specific types of communication don't have to.

### **We will be fair and reasonable**

- We will treat donors and the public fairly, showing sensitivity and adapting our approach depending on your needs.

- We will take care not to use any images or words that intentionally cause distress or anxiety.
- We will take care not to cause nuisance or disruption to the public.

### **We will be accountable and responsible**

- We will manage our resources responsibly and consider the impact of our fundraising on our donors, supporters and the wider public.
- If you are unhappy with anything we've done whilst fundraising, you can contact us to make a complaint. We will listen to feedback and respond appropriately to compliments and criticism we receive.
- We will have a complaints procedure, a copy of which will be available on our website or available on request.
- Our complaints procedure will let you know how to contact the Fundraising Regulator in the event that you feel our response is unsatisfactory.
- We will monitor and record the number of complaints we receive each year and share this data with the Fundraising Regulator on request.