



Fundraising Policy

Linlithgow Rugby Club's charitable status was confirmed on 1/09/2020, regulated by OSCR and by Companies House as it is an incorporated company. As a charity, the club is governed by the Objects of the Articles of Association:

Objects

The organisations objects are:

1. The advancement of public participation in sport, in particular:
 1. To promote the practice, play and development of Rugby Football;
 2. To encourage public participation in the sport of Rugby Football by all groups within the community.
2. The provision of recreational facilities, or the organisation of recreational activities, to support the development of rugby football and related physical activities with the object of improving the conditions of life, the club will encourage members of the general public, of all ages to take part in activities offered by the Club including, but not exclusively, fitness and leisure activities.

The company's objects are restricted to the above, however they may be removed altered subject to first obtaining the consent of OSCR.

Policy

Linlithgow Rugby Club is the recognised charity and as such all fundraising that takes place within the Club must be agreed and overseen by the Trustee Board. The General Duties of the Trustees are laid out below.

The Trustees must act all times in the interest of the charity as a whole and will be responsible to help / advise any groups which may seek to raise funds for the benefit of the charity and disbursement of funds will be on the basis within the various fundraising activities carried out by Club Members. Monies raised must be held within the Club bank accounts.

Any applications for 3rd Party Funding will done at club level in order to preserve the ability of the Club to meet its charity objects.

The main fundraising activities at a Club Level are:

- Town Fireworks
- Redsfest (Rugby 7s Festival and Beer Festival)

This is not a finite list, however they are the regular events that the club has and it is clear in setting these events up that all funds will be used for the benefit of the rugby club and as such will be held in the general funds. A process / general checklist for these events will be held by the Club Secretary.

Restricted Funding will be the exception and will generally only apply to applications for third party funding for large scale projects – to be signed-off by the Trustee Board.

Club Tours

Please refer to Tours Policy (LRC_RUG_4).

Any funds raised as part of a tour must be done within the Tour guidelines and any funds raised are deemed to be Linlithgow Rugby Club Funds which the Trustees will disperse in accordance with the Tour Guidelines

Trustee Responsibilities

The Trustees are responsible for taking control of how the Club raises funds and ensuring that all funds raised adhere to the Clubs policies.

The Trustees are responsible for implementing controls across:

- Financial Accountability
- Fundraising Process & Governance
- Operational Compliance

Financial Accountability and Segregation of Duties

• Checking and Recording

Once an event has taken place, all monies received must be deposited with the Office Manager as soon as possible post the event. The Office Manager will then check and record on the Club's accounts system.

• Holding of Money

All monies raised must be held in one of the Charity's bank accounts – no money can be held outwith the Club.

• 2 Person Cash Counting

All cash from events should be counted by 2 people as soon as is practicable and a cash-verification signed by both.

- **Independent Bank Reconciliations**

The Club's Office Manager will reconcile the monthly bank statements against the clubs accounting records and they should be independently reviewed by a Trustee who does not have payment authorisation rights.

- **Restricted Funds Tracking**

Money raised for specific projects must be clearly separated as *restricted funds* in the Club's accounts, ensuring they are not absorbed into general operating funds. The use of *restricted funds* should be used as little as possible and will generally be in relation to 3rd party funding.

Fundraising Process & Governance

- **Formal Approval Process**

All fundraising events/ activities must be approved by the Trustee Board against agreed plans and spending thresholds. This includes application for 3rd party grants and where appropriate the wording on the application.

- **Documentation & Receipts**

All transactions (both income & expenditure) must be backed up with relevant invoices and receipts.

Operational Compliance

- **Data Protection Compliance**

Ensure all donor or sponsor data is collected stored and used in accordance with data protection regulations

- **Licensing & Permissions**

If any local authority licenses are required, e.g. occasional license, entertainment license, then they should contact the Office Manager at outset

- **Safeguarding**

Ensure that all those who require to have their PVG have it and it has gone through the club process.

Jean McKeown

Chair / President

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Appendix 1 – Excerpts from OSCR regarding Trustee Responsibilities



The main Charity Trustee duties when Fundraising are:

- Acting in the interests of the Charity
- Acting with care & diligence
- Complying with the 2005 Act