

Policy on Belfast U3A Member Access by Third Parties

1. From time to time, other organisations, including public bodies, registered charities and private sector companies, seek access to members of U3A. Such requests may come in the form of a proposal to give a presentation to members about the activities or services provided by the requesting organisation, or a request to advertise services on the U3A website or its Newsletter, or a request for us to send information from the third party to individual members by email or post.
2. It is important to recognise that each U3A possesses valuable information in the form of personal contact details of over 900 people, predominantly retired people. This information is particularly valuable to organisations with commercial objectives seeking to sell products, particularly those marketed at older age groups. But even registered charities can have a 'commercial' objective, usually associated with fund raising. Some organisations may even suggest paying for member access or providing financial or non-financial sponsorship by way of recompense. Some may even seek a 'partnership' arrangement where risks and benefits are shared between both parties.
3. Of course, organisations may approach the U3A seeking support to provide information to members that could be judged to be particularly beneficial to people of an older age, especially in terms of their health and wellbeing. The aims and objectives may be entirely benign, but it can be difficult at times to differentiate between requests giving members real benefits and requests seeking commercial gains.
4. There are some important principles (which are drawn here from guidance established by the Third Age Trust for dealing with requests

for sponsorship) that need to be considered in deciding how to address approaches from third parties, as follows:

- A charity's name is a valuable asset – and appropriate steps always need to be taken to ensure that the reputation of the U3A is protected and that any relationship with a proposed third party organisation is a good fit.
- It needs to be clear from the outset what the U3A and its members stand to gain and what is expected of them in return. A U3A should be receiving appropriate value for the sponsorship rights – it should not be selling itself cheaply.
- A U3A should have an ethical policy which sets out the charity's values – and any commercial partner should align with the charity's ethical framework – this should fit within any wider Third Age Trust ethical framework.
- A U3A should report publicly on any commercial sponsorship received in its accounts.
- Due diligence needs to be undertaken to ensure that the proposed partner is suitable and appropriate and is not likely to damage the U3A's reputation.
- Any conflicts of interest need to be identified and carefully managed – particularly where the third party organisation has a connection to a member of the Executive Committee.
- Any risks arising from the relationship should be identified and steps taken to mitigate them – this should be recorded.
- There should be arrangements in place to oversee and manage the relationship. Has the U3A sufficient resources to manage such relationships in the short or long term.
- The arrangements should be set out in writing, and it should be clear how they can be terminated.

- Each arrangement should be reviewed once completed and any lessons learned identified and implemented in future arrangements.
 - Use by the partner of the U3A name and logo should be strictly controlled.
 - Ensure that the arrangement does not stray into a professional fundraiser or commercial participator type arrangement (to which more stringent rules apply)
 - The tax treatment of any sponsorship or payments needs to be understood.
 - All the deliberations of the Executive Committee on any such relationship should be recorded in the minutes of meeting.
5. Clearly, in no circumstances would it be appropriate, let alone legal in terms of data protection, to share personal email or postal addresses of members with a third party. Other than this there are broadly 4 possible means of access to members that third party organisations may seek:
- a. Advertising by the third party on the Belfast U3A Website or in the Newsletter of services or fundraising/donations requests.
 - b. Messages or advertisements of services or donations requests from a third party, other than a public body, to be emailed or posted to individual members by Belfast U3A.
 - c. Messages or advertisements from a public body providing critical information for members or requests for volunteers from public bodies or charities, to be emailed or posted to individual members by Belfast U3A
 - d. Sponsorship or partnership arrangements between Belfast U3A and the third party to deliver joint benefits.
 - e. Presentations by the third party at U3A monthly meetings or Group meetings.

6. Whichever of these means is employed by third parties, it is critical to recognise that any agreement to provide such access may be taken by some or all members as an endorsement of the product/service being promoted by the third party. Many third parties may be engaged in highly laudable service provision which might be deemed valuable to U3A members. Equally, many third parties may also (covertly or overtly) have strong commercial objectives to either raise money by way of donations or profits from products to be promoted. The Belfast U3A has an Executive Committee with its members drawn from various professional backgrounds, but no support staff. Conducting a due diligence exercise for every third-party request may simply not be tenable or sustainable. Even treating such requests on a case-by-case basis may also inadvertently create unintended precedents that might at the very least embarrass the U3A.
7. The overriding concern must be to protect the interests of members and the integrity of the U3A. It is also essential that the Executive Committee is satisfied that it has the capacity and resources to manage any arrangements to be agreed with third parties. It is therefore proposed that:
 - a. **ALL** requests from third parties for access as set out in **5a and 5b** above are **DECLINED**.
 - b. In the case of **5c**, it is recognised that on occasions public health bodies for example might seek cooperation in the promotion of vital health information in the midst, for example of a pandemic. Or that local charities are seeking volunteers. In these cases, it is proposed that requests are agreed, subject to Executive Committee approval.

- c. In the case of **5d**, it is proposed that **only** potential arrangements with public bodies (e.g. health and education) in Northern Ireland would normally be considered and that all such potential partnerships would be subject to careful consideration, including seeking advice from the Third Age Trust, and subject to Executive Committee approval.
- d. In the case of requests to give presentations (**5e above**) it is proposed that it should be made clear by way of a statement on the website and in the Newsletter that the views expressed by visiting speakers at any event are **NOT** endorsed by the Belfast U3A. The Executive Committee would still need to consider the appropriateness of such proposals and record its decision accordingly.

Jim Livingstone

Chairperson