

Fundraising Guidelines

AUTHOR Executive Director, Bianca Wheeler
SUBJECT Fundraising Guidelines & Proposal Form
DATE 1 April 2014

INTRODUCTION

Thank you for supporting Charlies Foundation *for Research* (CFR) in raising vital funds for the important research carried out at the Sir Charles Gairdner and Osborne Park Hospitals.

We truly appreciate and understand the effort involved in fundraising events and activities and we hope the experience is as rewarding for you and your supporters as it is for us.

The fundraising guidelines have been developed to provide information on the obligations of both the fundraiser and the CFR to comply with our Charitable Status and relevant fundraising legislation.

Prior to filling in your **Proposal to Fundraise** form – and to eliminate any confusion – please take the time to read and fully understand the information below.

Should you have any queries, please don't hesitate to contact us here at the Foundation via these avenues:

Phone 08 9346 3045 or 08 9346 2042
Email info@charliesfoundation.org.au
In person CFR Office, Watling Walk, Ground Floor, E Block, Sir Charles Gairdner Hospital

CHARITABLE STATUS

Charlies Foundation *for Research* abides by and complies with the obligations and regulations under the *Charitable Collections Act 1946*.

AUTHORITY TO FUNDRAISE FOR CFR

1. CFR is required to approve and authorise all volunteer fundraising activities conducted at or in conjunction with the Sir Charles Gairdner and Osborne Park Hospitals. Once your **Proposal to Fundraise** application is approved, CFR will issue you an **Authority to Fundraise**, confirming your proposed activity or event.
2. The **Authority to Fundraise** document can only be issued when:
 - a. A detailed and signed **Proposal to Fundraise** form has been received by CFR.
 - b. The fundraising activity has been confirmed as fitting with the aims and values of CFR,
 - c. The fundraising activity has been confirmed by CFR as not holding high risk
 - d. The fundraising activity has met the requirements of relevant laws and regulations, and
 - e. Approval has been gained from your Departmental Head and/or the ED Sir Charles Gairdner and Osborne Park Health Care Group where applicable.

*NB – If you fundraise on behalf of any charity without written **Authority to Fundraise**, you will be operating outside of the law.*

3. The fundraising activity will be conducted in the name of the 'Authorised Fundraiser' and is the sole responsibility of the Authorised Fundraiser. CFR may not always be able to take a coordination role in all fundraising activities and its office cannot always assist in soliciting prizes, organising publicity, or providing goods or services to assist the Authorised Fundraiser in the running of the event or activity.
4. 'Authorised Fundraiser' means the individual/s holding the fundraising activity or event in support of CFR. They will be the person or organisation named in the **Authority to Fundraise** document.
5. If the Authorised Fundraiser wishes to refer to, or promote CFR, they must refer to CFR in full, as *Charlies Foundation for Research*. The Authorised Fundraiser only has a right to raise funds on behalf of CFR but cannot state that they are CFR, or are representing CFR.

Suggested wording:

- a. "Proudly Supporting Charlies Foundation *for Research*"
 - b. "Funds raised go to support patient-centred research at Charlies Foundation *for Research*"
6. Due to the nature of our organisation and the high ethical standards under which we operate, there may be some fundraising activities that we cannot be associated with.
 7. The CFR Public and Products Liability Insurance will cover authorised CFR fundraising activities, however, please note CFR Public and Products Liability Insurance does not cover activities involving the following:
 - a. Horses,
 - b. Motorcycles,
 - c. Cars,
 - d. Aeroplanes, and/or
 - e. Boats.

8. CFR reserves the right to withdraw its approval for the fundraising activity or event at any time without explanation.

MARKETING AND ADVERTISING

1. If the Authorised Fundraiser wishes to utilise the CFR name and/or logo on any materials or products, the Authorised Fundraiser must obtain prior permission from CFR. Guidelines on how to use the CFR logo are supplied upon request.
2. All printed material, including media releases, must be approved by CFR. Printed material must be forwarded to the Foundation office for approval **prior** to being printed or circulated.
3. Permission for logo use will attract conditions negotiated between CFR and the Authorised Fundraiser if the use of the logo is for product or service marketing.

FUNDS RAISED

1. Proceeds of the fundraising activity or event, together with any relevant correspondence need to be sent to CFR within 14 days of the conclusion of the fundraising activity or event.
2. Funds raised for CFR can be banked, sent or delivered directly to the Foundation office.

If you wish to bank your raised funds directly into the CFR bank account, please contact the Foundation directly to obtain bank account details and instructions.

If you wish to send your funds by mail, please send a cheque, money order or credit card details to:

Charlies Foundation for Research
PO Box 240
Nedlands WA 6909

3. Additionally, CFR is a recognised charity on the **everydayhero.com.au** website. This means, you can build your own Supporter Page and then start using it to inspire others with a story about why you are supporting CFR, post updates, images and videos, tell your social networks and ask others to help make a real difference.

You can ask anyone to help you support CFR by simply sharing the link to your page, through which they can easily sponsor you (and CFR) and leave a message of encouragement.

Rest assured all donations are processed by Everyday Hero and passed on to CFR directly.

4. As a CFR Authorised Fundraiser, you have certain record keeping and reporting requirements. If your event includes a Standard Lottery Raffle you are responsible to the Department of Racing and Gaming to comply with terms and conditions of the permit.

CFR reserves the right to request any financial information associated with the fundraising activity or event.

5. CFR can only provide official receipts for approved fundraising activities. Tax deductible receipts can only be issued for donations of \$2 or more.

6. CFR will not issue receipts to Authorised Fundraiser individuals for distribution. If a donor requires a receipt, please ensure a CFR Donation Slip is completed and returned to CFR for the issue of an approved tax receipt.

7. The following are **not** tax deductible:

- a. Ticket purchases, e.g. raffle tickets
- b. Entry fees to or for a fundraising activity or event
- c. Donation of goods or services
- d. Auction item purchases

8. The following **are** tax deductible:

- a. Monetary donation, that is, when the donor receives no benefit or product or item in return.

If you have any questions about your fundraising application, please don't hesitate to contact us on:

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Email info@charliesfoundation.org.au

In person CFR Office, Watling Walk, Ground Floor, E Block, Sir Charles Gairdner Hospital

AUTHORISATION

Executive Director & Company Secretary _____

Bianca Wheeler

Date _____