

FUNDRAISING GUIDELINES

PLAN AND RUN YOUR OWN FUNDRAISING ACTIVITY

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FOUR STEPS TO RUNNING A SUCCESSFUL FUNDRAISING ACTIVITY

THANK YOU FOR CHOOSING TO FUNDRAISE FOR LORD MAYOR'S CHARITABLE FOUNDATION

To help you organise a successful fundraising event, the Fundraising Guidelines set out:

- a step-by-step guide on planning and running your activity;
- forms for seeking approval to fundraise and reporting on the money you have raised (see pages 3 and 4),
- information on promoting your activity and general information on complying with the Foundation's Privacy Policy and relevant laws (see pages 5–7). The Foundation's Privacy Policy is available at lmcf.org.au/policies please make sure you read this policy before completing your fundraising proposal.

Please read through carefully and then complete the Fundraising Proposal on page 3. If you have any questions, please call the Foundation's Donor Development Manager on **(03) 9633 0033** or email philanthropy@lmcf.org.au.

STEP 1: PLAN YOUR ACTIVITY AND OBTAIN APPROVAL TO FUNDRAISE

In addition to the who, what, where and when, you should consider any safety or other risks, and make sure that your proposed activity is legal. Some activities require special permissions from local authorities. We have given you some guidance and links to further information in the 'Legal Matters' section (See pages 6-7).

There are certain activities that we do not endorse, including door-knocking, telemarketing and roadside or shopping-centre collections. We also cannot approve activities that are inconsistent with the Foundation's values and charitable purposes or seek to promote unethical activities (tobacco use, armament, excessive drinking or gambling (other than raffles)). Please refer to the Foundation's Gift Acceptance Policy and Fundraising Policy for more information on activities that we support.

Once you have planned your activity and checked that it complies with our policies and relevant laws, please complete the Fundraising Proposal to philanthropy@lmcf.org.au. **Our Donor Development Manager will review your proposal and contact you.** Once we have approved your activity, we will send you an Authority to Fundraise letter, Fundraising Undertaking (if required) and an Activity ID.

STEP 2: PROMOTE YOUR ACTIVITY

Once you have received our Authority to Fundraise letter, you can start promoting your activity to your friends, family, colleagues and other networks.

We will list your Charitable Fund Account on our web donation form so your participants can donate directly online. You can also promote your activity by tagging us on Facebook at [facebook.com/LordMayorsCharitableFoundation](https://www.facebook.com/LordMayorsCharitableFoundation)

STEP 3: RUN YOUR ACTIVITY AND COLLECT DONATIONS

The fastest, most convenient way to collect donations is by asking your participants to give directly through the Lord Mayor's Charitable Foundation website lmcf.org.au. Participants will receive a receipt by email.

If you must accept a cash donation, you are required to comply with the Lord Mayor's Charitable Foundation Cash Handling Policy and use the form attached to record donations.

STEP 4: DEPOSIT DONATIONS AND SHARE YOUR NEWS

Once you have collected donations from your participants, you can deposit them in the following ways:

1. Through our website at lmcf.org.au
2. By sending a cheque payable to 'Lord Mayor's Charitable Foundation', reference: Name / Name of Charitable Fund Account (if applicable), to:
**Lord Mayor's Charitable Foundation
GPO Box 1851, Melbourne VIC 3001.**

You must deposit your donations within two days of your activity.

Make sure you also send us your Activity Report on page 4, together with any donor receipt requests on the completed Lord Mayor's Charitable Foundation Donation Form enclosed in a sealed envelope.



FUNDRAISING PROPOSAL

To request our approval for your fundraising activity, please complete this proposal and send it to philanthropy@lmcf.org.au. If you have any questions, please call the Foundation's Donor Development Manager on (03) 9633 0033.

ORGANISER DETAILS

Name _____

Organisation Name _____

Mailing address _____

Phone _____

Email _____

ACTIVITY DESCRIPTION

Name of activity _____

Date of activity _____

Venue / address _____

Purpose of fundraising _____

Please describe how the funds will be raised _____

How much do you expect your activity to raise? _____

How many people do you expect to participate? _____

If you are planning a raffle, what will be the value of the prizes? _____

Do you have or intend to obtain:

- public liability insurance for the activity (please check with the venue) Yes No
- a fundraising or gaming licence? (see 'Legal Matters' on pages 6-7) Yes No

What expenses, if any, do you intend to deduct from the funds raised?

Does the activity comply with [Consumer Affairs Victoria's Conditions on Fundraising](#)? Yes No

Please name any partners or sponsors who are supporting your activity

ACKNOWLEDGMENT (to be signed by an officer with authority to bind your organisation)

Please confirm that you understand and agree that:

- you are responsible for your activity and will comply with the Foundation's Fundraising and related policies including [Fundraising Policy](#), [Fundraising Guidelines](#), [Gift Acceptance Policy](#) and [Privacy Policy](#).
- you will obtain our approval before printing or distributing any promotional materials or media releases;
- you will ensure that the activity complies with relevant laws and that you have necessary insurance, licences or permits.

I _____ confirm the matters above: Yes No
(Name & Position)

Signature: _____ Date: _____

ACTIVITY REPORT



Thank you for fundraising for Lord Mayor's Charitable Foundation. All monies raised need to be banked into a Foundation bank account within two days of the conclusion of the fundraising activity. Once you have completed the activity, complete this form and email it to us at philanthropy@lmcf.org.au. Make sure you manage any donor receipt requests by providing the donor with an up to date Lord Mayor's Charitable Foundation donation card (which discusses how the Foundation complies with the Australian Privacy laws and Lord Mayor's Charitable Foundation envelope, to be returned to the Foundation's office by hand (not by post/courier).

ORGANISER DETAILS

Name _____
Activity ID _____

ACTIVITY SUMMARY

How much money did your activity raise?

| | | |
|-----------------------------|----|-------|
| Gross | \$ | _____ |
| Expenses (if applicable) | \$ | _____ |
| Net amount raised | \$ | _____ |

DEPOSIT METHOD

Amount deposited through lmcf.org.au \$ _____
Cheque enclosed \$ _____
Did donors also give directly through our website? Yes No Unsure

RECEIPTS

Are individual tax-deductible receipts required? Yes No

If so, please ensure that donors have completed a Lord Mayor's Charitable Foundation donation card which has been placed in a sealed envelope.

Signature: _____ Date: _____

MEDIA AND INFORMATION ABOUT YOUR ACTIVITY

STATEMENTS ABOUT YOUR ACTIVITY

Please make sure that any information about your activity is accurate and easy to understand. In particular, you need to make clear to your participants that:

- your Charitable Fund Account is part of the Lord Mayor's Charitable Foundation's public ancillary fund, and the Foundation is responsible for making grants, and
- even though you are raising funds for Lord Mayor's Charitable Foundation, you do not represent the Foundation and cannot speak on our behalf.

You also need to tell participants about the proportion of proceeds that will be donated from your activity – for example, whether all proceeds will be donated to Lord Mayor's Charitable Foundation, or whether you intend to deduct certain expenses.

PRODUCING YOUR OWN MATERIALS

You must obtain our approval before printing or distributing any of your own promotional materials or media releases that contain the Lord Mayor's Charitable Foundation logo or any wording about the Foundation. This is so we can ensure that the activity and the involvement of the Foundation are presented correctly. To request our approval, please email info@lmcf.org.au. We can then provide you with copies of our logo and our Brand Guidelines.

PRIVACY

The personal information you provide as part of your fundraising activity, including in any forms you submit, is collected and used to assess and approve your fundraising activity, to process donations, and for purposes set out in our Privacy Policy, available on our website at lmcf.org.au/policies.

LEGAL MATTERS



RESPONSIBILITY

You are responsible for the organisation, conduct, marketing and record-keeping in respect of your fundraising activity.

This is the case even when you have been issued with an Authority to Fundraise letter. The Foundation accepts no responsibility for any loss or liability arising from your activity.

BUDGETING, EXPENSES AND MONEY-HANDLING

It is possible to deduct reasonable expenses from the proceeds of your activity, but you will need to be upfront about this with your participants. As a guide, we recommend that your expenses should be no more than 30 per cent of the total proceeds. You need to keep and provide Lord Mayor's Charitable Foundation with accurate records of your activity in the Activity Report.

We cannot provide reimbursement for any of your expenses, or provide you with any prizes, auction or raffle items.

TAX DEDUCTIBILITY

Lord Mayor's Charitable Foundation operates a public ancillary fund with deductible gift recipient status. On request, the Foundation can provide tax-deductible receipts for donations of \$2 or more. However, please note:

- you cannot claim a personal tax deduction for gifts made by other people, and
- the Foundation cannot provide a tax-deductible receipt to a donor who has received something in return for their donation, such as goods or services. Please keep this in mind when planning and promoting activities like raffles, food stalls, charity auctions and ticketed events.

Understanding if a donation is tax-deductible is important. The information contained in this document is not legal advice. If you are unsure, you should seek your own legal advice from an Australian-registered legal practitioner. The Australian Charities and Not-for-Profits Commission also provides information on fundraising at acnc.gov.au.

TAX-DEDUCTIBLE DONATIONS

When a donor receives nothing but acknowledgement in return for their donation to a registered charity in Australia, it is a tax-deductible donation. Such donations may include:

- Donations on your webpage;
- Gift Registry donations;
- Company matched donations;
- Corporate donations;
- Donations to a cause.

NON-TAX-DEDUCTIBLE DONATIONS

When a donor receives something (a benefit), or the chance to win something, their donation is not tax-deductible. For example, the following would not ordinarily be considered by the Australian Taxation Office to be a tax-deductible donation:

- Donations for morning tea;
- Purchasing raffle tickets;
- Event tickets for a dinner or a show;
- Sale of items (cakes, sausage sizzle).

FUNDRAISING EVENTS

If a fundraising event includes a fete, ball, gala show, dinner, performance or similar event, you can claim a tax-deduction if you made:

- a contribution of money or property to attend or participate in (or for the right to attend or participate in) a fundraising event, or
- a contribution of money to purchase goods or services at a charitable auction.

Your contribution must meet the following conditions.

- It was made to an approved charitable organisation (i.e. Lord Mayor's Charitable Foundation).
- If it was money, it was more than \$150.

Your deduction is the value of your contribution that satisfies the conditions set out above less the GST-inclusive market value of the minor benefit you received. Both of these amounts appear on your receipt.

The Australian Tax Office provides further information on tax-deductible giving in the context of fundraising events at ato.gov.au/Non-profit/Gifts-and-fundraising.

WHAT IS NOT CONSIDERED FUNDRAISING?

Certain activities are not fundraising for the purposes of the Fundraising Act 1998 (Vic). According to section 5(3) of the Fundraising Act, the Act does not cover soliciting or receiving money or other benefits from the following:

- Raffles, lotteries or other gaming activities that are authorised or permitted under the Gambling Regulation Act 2003 (Vic), such funds are referred to as contributions;
- Becoming a member of an organisation (a *joining or membership fee*).

COMMUNITY AND CHARITABLE GAMBLING AND LIQUOR REGULATION

What are the requirements to run a raffle?

Raffles can only be run by organisations that have been declared by Victorian Commission for Gambling and Liquor Regulation. Approved organisations can hold a raffle with the prior approval from the Foundation CEO, without a minor gaming permit if the prize value is \$5,000 or less. See further: vcglr.vic.gov.au/gambling/raffle/licensee-resources/faqs

WHAT IS REQUIRED TO BE PRINTED ON RAFFLE TICKETS?

Regulation 84 of the Gambling Regulation 2015 (Vic) prescribes what must be included on a raffle ticket, in addition to the privacy requirements of a collection notice, name of the entity conducting the fundraising.

The Gambling Regulation Act 2003 (Vic) provides a raffle is a small raffle where the prize value does not exceed \$500.00.

Unless the raffle is a small raffle, on the sale of a ticket the person conducting the raffle must ensure that a permanent record is made of sufficient information to identify and locate the person to whom the ticket is sold.

Unless the raffle is a **'small raffle'** (total prize value of \$500 or less), the following is printed on each ticket:

- The name of the community or charitable organisation to benefit from the raffle;
- The ticket price;
- A description of each prize and its value;
- The location, the date and the time at which the raffle will be drawn and the method of publication or notification of the results.
- The raffle must be drawn on the day printed on the ticket.

Record keeping provisions also apply.

INSURANCE AND SAFETY

Unless we have agreed in writing prior to your activity, your fundraising activity will not be covered by any of the Lord Mayor's Charitable Foundation's insurance policies. You are responsible for checking if you need to obtain appropriate insurance and implementing safety precautions.

PERMITS

You must ensure that your fundraising activity complies with relevant laws and that you have obtained any necessary licences or permits. Permits and insurance are necessary for certain types of activities, including events held in public places. Information and checklists for holding different types of events are available on the Not-for-profit Law Information Hub at nfplaw.org.au/events and on the Australian Charities & Not-for-Profits Commission's home page.

If you expect your activity will raise more than \$10,000, you must register as a fundraiser with authorities in your state or territory. In Victoria, fundraising is regulated by Consumer Affairs Victoria, with information available at consumer.vic.gov.au/clubs-and-not-for-profits/fundraisers.

There are also separate laws in each jurisdiction regarding gaming, including activities involving raffles, lotteries or prize draws. Gaming in Victoria is regulated by the Victorian Commission for Gambling and Liquor Regulation, further information is available at vcglr.vic.gov.au. For an overview of fundraising and gaming laws in each jurisdiction, we recommend you consult the fundraising page of the Not-for-profit Law Information Hub at nfplaw.org.au/fundraising.

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