

# FUNDRAISING GUIDELINES

## PLAN AND RUN YOUR OWN FUNDRAISING ACTIVITY



**Inspiring Philanthropy**

**Since 1923**

[lmcf.org.au](http://lmcf.org.au)

ABN 63 635 798 473

# 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 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 6 and 7),
- information on promoting your activity and general information on complying with the Foundation's privacy and relevant laws (see pages 4 and 5). The Foundation's Privacy Policy is available at [lmcf.org.au/privacy](https://lmcf.org.au/privacy) 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 Engagement Manager on (03) 9633 0033 or email [philanthropy@lmcf.org.au](mailto: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 page 6).

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 such as tobacco use, armament, excessive drinking or gambling (other than raffles).

Once you have planned your activity and checked that it is legal with an independent advisor (the Foundation cannot advise you on what is a legal activity), please complete the Fundraising Proposal and return it to us. Once we have approved your activity, we will send you an Authority to Fundraise letter 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.

You can also promote your activity by tagging us on Facebook at [facebook.com/LordMayorsCharitableFoundation](https://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](https://lmcf.org.au). Participants will receive a receipt by email or mail.

**If you must accept a cash donation, you are required to comply with the Foundation's 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](https://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 three 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](mailto:philanthropy@lmcf.org.au). If you have any questions, please call the Foundation's Donor Engagement Manager on (03) 9633 0033.

## ORGANISER DETAILS

Organisation Name \_\_\_\_\_

ABN \_\_\_\_\_

Contact 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' above) Yes  No

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

\_\_\_\_\_

Please name any partners or sponsors who are supporting your activity \_\_\_\_\_

\_\_\_\_\_

## ACKNOWLEDGMENT

Please confirm that you understand and agree that:

- you are responsible for your activity and will comply with the Foundation's Fundraising Guidelines 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 obtained all necessary insurance, licences or permits.

I confirm the matters above: Yes  No  (please indicate) \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# ACTIVITY REPORT



Thank you for fundraising for Lord Mayor's Charitable Foundation. All monies raised must be banked into a Foundation bank account within three 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](mailto:philanthropy@lmcf.org.au). Make sure you manage any donor receipt requests by providing the donor with a Lord Mayor's Charitable Foundation donation card and envelope, to be returned to this office by hand (not by post or 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](http://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 request the donor to complete a Lord Mayor's Charitable Foundation donation card and place 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](mailto: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/privacy](https://lmcf.org.au/privacy).

## 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](http://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).

## Fund raising events

If a fund-raising 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 fund-raising 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](http://ato.gov.au/Non-profit/Gifts-and-fundraising).

## INSURANCE AND SAFETY

Unless we have agreed in writing prior to your activity, your fundraising activity will not be covered by any of 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](https://nfplaw.org.au/events) and on the Australian Charities and Not-for-Profits Commission 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 [vic.gov.au/clubs-and-not-for-profits/fundraisers](https://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](https://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](https://nfplaw.org.au/fundraising).

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**LORD MAYOR'S CHARITABLE FOUNDATION**

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