

# Fundraising guidelines



# BEFORE YOU START...

Thank you for helping to raise funds for the Leukaemia Foundation. Before you start, you will need to review these guidelines to ensure your upcoming fundraising event is not only successful and fun, but also in accordance with the law.

Your event needs to be run safely and meet all the financial and legal requirements. That way, not only will it go smoothly with great results but will ensure all your efforts goes towards making a real difference to those in need.

Don't worry – the following kit provides all the guidelines, forms and great ideas you'll need.

## 1. Authority to Fundraise

The Leukaemia Foundation is legally required to approve and authorise all volunteer fundraising activities. Once your event is approved, the Foundation will provide you with a letter giving you confirmation of your legal authority. This is issued following receipt and approval of your fundraising application form (see page 8). Approval will be granted when the Foundation:

1. has received a written and signed application
2. is satisfied that the fundraising activity will produce a reasonable return after expenses have been deducted
3. is satisfied that the fundraising activity fits in with the aims and values of the Leukaemia Foundation and complies with these guidelines
4. is satisfied the fundraising activity is not high risk.

Once the authority to fundraise is issued, these guidelines will form the basis of the terms and conditions of the fundraising activity.

"The fundraiser" means the individual or organisation holding the fundraising activity on behalf of the Leukaemia Foundation.

## 2. Responsibility

The fundraiser will be run in the name of the person listed on the authorisation form and will be solely responsible for the activity. The fundraiser, not the Leukaemia Foundation, will be responsible for the coordination and management of the event, finances, prizes, publicity and/or goods and services required to run the activity. However, where possible, support and advice will be offered.

In your correspondence and promotion of the event, please ensure you make clear that the fundraising activity is not the Leukaemia Foundation's but instead is an activity to raise funds for donation to the Foundation.

Suggested phrases to use include:

*"proudly supporting the Leukaemia Foundation" or "funds raised will go to support the work of the Leukaemia Foundation"*

## 3. Public liability insurance

The Leukaemia Foundation has public liability insurance to cover most fundraising activities. You will be covered once you have received a letter from the Foundation confirming your authority to fundraise as well as a copy of the public liability certificate.

However the Foundation reserves the right to refuse authority for events that are deemed dangerous or unacceptably risky. This may include activities involving:

- Animals or animal rides
- Motor vehicle and motor bike racing
- Dangerous machinery
- Clock or time trials, racing or similar competitive events

Depending on your event, you may also need to consider arranging additional public liability insurance of your own.

The Foundation will not endorse events that may adversely effect your health (eg smoking) or which involve the use of firearms, missiles, explosives or fireworks.

All fundraising activities must comply with Australian laws and regulations.

#### 4. Media and promotional materials

Generating publicity before your fundraiser starts is a great way to help increase ticket sales, get local support and raise awareness about the cause.

You are responsible for generating your publicity however the Foundation is able to provide media fact sheets about the Leukaemia Foundation in your regional area.

If the media require information about the Leukaemia Foundation, leukaemias, lymphomas, myeloma and related blood disorders they must contact our media team on 1800 620 420. The fundraiser is not authorised to speak on behalf of the Foundation, only about the fundraising activity.

Please also remember to make clear you are *raising money in aid of the Leukaemia Foundation but that you do not represent the Leukaemia Foundation.*

All printed promotional materials **must be** approved by the Leukaemia Foundation prior to print and circulation.

When stating where the funds raised will go, please use the following phrase

*“funds raised will help patients and families living with leukaemias, lymphomas, myeloma or related blood disorders as well as fund vital research into better treatments and cures.”*

Please refer to the Foundation as “the Leukaemia Foundation” (not state specific).

#### 5. Logo usage

The Leukaemia Foundation logo is available upon request. Any placement of the Leukaemia Foundation logo (by yourselves or supporting commercial organisations) must be approved by the Foundation.

Guidelines on how to use the logo are supplied upon request and following approval.

#### 6. Leukaemia Foundation website

We can include your event/activity's details on the Foundation's website [www.leukaemia.org.au](http://www.leukaemia.org.au). Please ensure you provide the Foundation with as much information about your upcoming activity as possible.

#### 7. Approaching companies for support

The Leukaemia Foundation is regularly speaking to companies regarding their support. As such, please do not approach the national or state office of a company for prizes or sponsorship without prior consultation with the Foundation.

Although these policies may be frustrating, they serve several important purposes:



- The company or group may already support us
- It looks very unprofessional if a company is approached more than once
- Approaching a national or state office could potentially destroy negotiations for a major sponsorship.

## 8. Money matters

As the fundraiser, you are responsible for all financial aspects of the activity including record keeping, management of funds, issuing receipts and depositing funds into the Leukaemia Foundation's bank account.

You must comply with the Charitable Fundraising Act and regulations in your state. The basic obligations are:

- Keep and provide the Leukaemia Foundation with accurate financial records including a budget or your activity
- All funds raised must be deposited into the Leukaemia Foundation account within three weeks of the fundraising activity using the deposit slip provided (in your receipt books)
- All receipt books used and **unused** must be returned to the Leukaemia Foundation in your capital city

- The Leukaemia Foundation cannot pay expenses incurred by you, but you can deduct your necessary expenses from the proceeds of your event, provided they are properly documented. (Total expenses must be less than 30% of total proceeds)

TIP for record keeping: a simple way to keep track of the financial details of your event is to keep a folder with a number of plastic sleeves. Use individual sleeves to keep receipts, bank deposit stubs, cheques donated, donor sponsorship/tally sheets. A budget template is provided for your use in this kit.

## 9. Issuing a Foundation receipt

The Foundation will supply receipt books on request. There are two types of official Leukaemia Foundation receipts that can be issued:

- A **non tax-deductible** receipt (brown receipt book). This is for when the person gets something in return for giving (for example a raffle ticket, entry to an event, auction purchases).
- A **tax-deductible** receipt. (blue receipt book). This is issued for a straight donation. That is, when the donor receives nothing back in return (eg straight monetary donation or donation of a prize to be used in the fundraiser to benefit the Foundation). The fundraiser is responsible for issuing the correct receipt. If in doubt, please refer to the Australian Tax Office website under 'tax deductible gifts'.

Link: [www.ato.gov.au/nonprofit/content.asp?doc=/content/33650.htm&page=2&H2](http://www.ato.gov.au/nonprofit/content.asp?doc=/content/33650.htm&page=2&H2)



## Points to note:

- Tax-deductible receipts can only be issued to people donating money of \$2 or more
- Receipts can be written and issued immediately for all money received
- You cannot claim tax deduction for monies received on behalf of others
- You cannot claim tax deduction for gifts that are donated to your activity
- If preferred, the fundraiser can keep a register of all attendees/supporters eligible for a tax-deductible receipt. Individual receipts can be sent to the fundraiser for distribution to attendees/supporters
- If supplied, Leukaemia Foundation official receipt books and raffle books must be returned (used and unused) to the Leukaemia Foundation.

## 10. Doorknocking

Please **DO NOT** door-knock to individual houses to collect donations or to promote your fundraiser. In many council areas around Australia, doorknocking is illegal without a special permit.

## 11. Legal implications

All fundraising activities must be legal, complying with all Australian Federal and State laws. In each state, there is a Charitable Fundraising Act or equivalent that the Leukaemia Foundation and people fundraising for the Foundation must adhere to. Other regulations you should be aware of relate to gaming, liquor licensing and preparation of food.

## 12. Third party permits and permission

- Consider informing the Police, Red Cross/St John's Ambulance if it is a large event
- Obtain permits from your local council. It may be wise to investigate the requirements before too much planning has been done

The Foundation wishes you every success in your fundraising activity. Thank you again for your support and commitment to helping others in need.



# A - Z FUNDRAISING IDEAS

We have ideas for every letter of the alphabet...

## A

Arts and Crafts Fair, Auction, Antiques Fair, Aerobics-athon, Activities Day, Afternoon Tea Party, Art Exhibition, After work drinks

## B

Ball, Bad Hair Day, Barn Dance, BBQ, Balloon Race, Battle of the Bands, Breakfast Party, Buffet Lunch, Bike Ride, Beat the Goalie, Baked Beans Bath, Bingo

## C

Cake Sale, Calendar, Champagne Lunch, Car Boot Sale, Christmas Fair, Cook Book, Coffee Morning, Collection Boxes, Cookery Demonstration, Concert, Craft Fair, Cricket Match, Car Wash, Crazy Hair Day

## D

Darts Competition, Disco, Draw, Dog Show, Dance, Dance-athon

## E

Exhibitions, Easter Egg Hunt

## F

Fashion Show, Fancy Dress, Face-painting Competition, Film Premiere, Furniture Sale, Fun Run, Fifties Party, Five-a-side Tournament, Fete

## G

Garage Sale, Gardening, Games Night, Golf Day (or better still, Golf Marrowthon)

## H

Halloween Party, Hula Hoop Contest, Head Shave for World's Greatest Shave, Horse Show, Household Sale

## I

Ice Skating Party, Indoor Market, Ironing (other people's clothes in return for a donation)

## J

Jumble Sale, Jazz Event, Jewellery Making, Japanese Themed Party

## K

Knit (sponsored), Kite Flying (sponsored), Karaoke Night, Kilometre of coins

## L

Lunch for Leukaemia, Light the Night

## M

Make-up Demonstration, Marathon, Musical Evening, Midsummer Ball, Magical Events, Murder Mystery Dinner, Matched Giving, Mini Olympics, Mufti day, Movie premiere

## N

Nearly-new Sale, Nature Trail, New Year's Resolution

## O

Open Garden Event, Opera Night, Orienteering

## P

Pantomime, Plant Sale, Pop Concert, Poetry Reading, Panel Game, Pancake Race, Parties

## Q

Quizzes

## R

Races, Raffle, Recipe book, Run (sponsored), Rather Posh Party

## S

Shave your head, Shave your eyebrows, Shave your beards, Shave your legs, Sale, Shop, Sponsored Events, Scrabble Contest, Slave-for-a-day Auction, Supper Party, Sweepstakes, Silent Auction, Shows (flower, etc.), Swear Box, Shoe Shine, Scavenger Hunt, Shoe Party, Sports days

## T

Talent Contest, Tombola, Toy Fair, Treasure Hunt, Trusts, Theatre Premiere, Tea Party, Themed Evening, Tug of War, Ten-Pin Bowling, Teddy Bears' Picnic

## U

Ugly Face Pulling Contest, Unwanted Presents (ebay)

## V

Valentine Dance, Variety Show

## W

World's Greatest Shave, Walk (sponsored), Waxing, Weight of the Cake (Guess the)

## X

Xmas Stockings, Xmas Cards, Xmas Gifts, Xmas Hampers

## Y

Yo-Yo Competition, Yoga

## Z

Zoo Quiz, Zodiac Evening



# 10 STEP 'HOW TO' FACT SHEET

As with most things, careful planning at the start of any activity will ensure the most successful and enjoyable event. There will be several things to consider, from where to hold an event to how many people to invite.

If you haven't fundraised before, don't feel daunted. Help is at hand! Here is an example of the many 10

step fact sheets available from the Foundation on how to run a successful event or activity. Please call your local office fundraising team member on 1800 620 420 to get a copy and other help to make your activity fun and as stress-free as possible.

Example

## 10 step plan for success Garage Sale

### 1. SET A GOAL

Set yourself a clear goal of what you want to achieve from the garage sale – be specific (eg I want to raise \$1000 from sales and an extra \$200 from donation tins on the day). It will help you put your plan and budget together.

### 2. HOW WILL YOU RAISE FUNDS?

How will you obtain items for sale? Can you ask neighbours and friends to donate items? What other ways could you raise some more: Selling coffee and cakes? Holding a raffle (what will be the prizes – a basket of great items)?

### 3. MAKE A PLAN

Answer these questions to start your event plan and get an idea of your costs: Where will the fair be held? What date and what time will you hold it (check what else is on locally, public or school holidays)? How will you attract stallholders and customers? How will you encourage them to spend money? How many items or stalls do you need to get to your goal? How will you get all the items to the venue? Do you have a wet weather contingency or considered what else could go wrong? Write a checklist of all the things you'll need including equipment, transport, refreshments and signs.

After the race entertainment? Chest bibs? Prizes?

### 4. PLAN YOUR ADVERTISING

How will people know about your garage sale? Can you place fliers in the streets around your local area? Who can spread the word? Where will you advertise? Can you place posters on community notice boards? Can you send a 'What's On' ad or media release to the local paper and radio station? Can you advertise on websites that specialise in Craft fairs? Will any of this advertising cost money?

### 5. GET SUPPORT FROM LOCAL BUSINESSES

Can you get a local business to sponsor your fair in return for putting their name on your signs and advertising? Will a printer reduce their costs or even do your

printing for nothing? Can a service club run a sausage sizzle for you? Can you get prizes donated? It all helps to cut costs.

### 6. DRAW UP A BUDGET

Go through your plan and list all the costs. Take the total costs away from your fundraising target.

What's left? Is it enough? Make sure your total fundraising is at least three times more than you're spending, otherwise it may not be worthwhile. Rethink your plan if necessary.

### 7. KEEP IT LEGAL

Check for any permissions you may need. Do you need a license? Do you need public liability insurance? Will people be making donations they can claim off their tax or just buying items – you may need different types of receipts. Check with local or state authorities. You will also need an 'Authority to Fundraise' from the Leukaemia Foundation. If in doubt, contact us.

### 8. ASSIGN JOBS

Break down your plan into smaller steps (or jobs) of what needs to be done and assign each one to a person or a small group. Always think about what people are good at when assigning jobs and make sure each job has a timetable. It's no use trying to advertise your event the day before! Some jobs won't wait. Always allow more time than you think and don't do it all yourself!

### 9. ENJOY THE DAY

After all this work, make sure you actually enjoy the fair – you deserve it!

### 10. BANK & THANK

Bank the funds you've raised with the Leukaemia Foundation.

Keep records of all the money you've spent and all the money you've been given. This is good practice and helps you keep track of who you need to thank. Make sure you thank everyone who attends your fair. Thank everyone who helps. Thank your sponsors.

**BUDGET FOR [Name of event]**

	Estimated	Actual
<b>Total income</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total expenses</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>TOTAL RAISED FOR LEUKAEMIA FOUNDATION</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>INCOME</b>	Estimated	Actual
<b>Event proceeds</b>		
Entry fees		
Ticket sales		
Other income		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Extra sales</b>		
Auction		
Raffle		
Sales of photographs		
Sales of merchandise		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

	Estimated	Actual
<b>Sponsorship</b>		
Major sponsors		
Minor sponsors		
Other sponsors		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Donations</b>		
Donations		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>EXPENSES</b>	Estimated	Actual
<b>Site</b>		
Equipment hire		
PA, audio visual		
Permits, licences		
Venue hire		
Site staff		
Tables & chairs		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Refreshments</b>		
Casuals		
Cutlery		
Drinks		
Food		
Linens		
Plates, glasses etc		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Promotion</b>		
Advertising		
Distribution		
Graphic design		
Paper/stationery		
Photocopying		
Photography		
Postage		
Printing		
Web site		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Miscellaneous</b>		
Couriers		
Fuel		
Insurance		
Phone calls		
St Johns		
Volunteer expenses		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

	Estimated	Actual
<b>Decoration</b>		
Balloons		
Banners and signs		
Flowers		
Lighting		
Table centres		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Prizes</b>		
Auction items		
Goodie bags		
Ribbons, trophies		
Thank you gifts		
Certificates		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Program</b>		
Car parking		
Accommodation		
Marshalls/staff		
Other production costs		
Performers		
Speakers		
T shirts/clothing		
Team signs/numbers		
Travel/transport		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

<b>Other Expenses</b>		
Dry cleaning/laundry		
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>

BUDGET TEMPLATE  
note: this template is available in electronic format from the Foundation

# APPLICATION FORM FOR AUTHORITY TO FUNDRAISE

Application date: ..... / ..... / .....

Name of group/company/individual planning the event ("the fundraiser"): .....

ABN (if company): ..... Name of individual/s responsible: .....

Mailing address: .....

Daytime phone: ..... Mobile: .....

Fax: ..... Email: .....

Type of fundraising activity: .....

Name of activity: .....

Overview of event: .....

Date(s): ..... Time: .....

Location (include address): .....

How the will funds be raised? .....

How many people are expected to attend? .....

Will all the proceeds come to the Leukaemia Foundation?  yes  no

If no, list other organisation/s (and percentage split): .....

Does the event require public liability insurance?  yes  no

Does the event require council/government permits?  yes  no

Will a raffle take place in conjunction with the event?  yes  no

Will a raffle or fundraising permit be required?  yes  no  not sure

Will the event cross into other states?  yes  no

If yes, which ones: .....

Will you be seeking sponsorship for the event?  yes  no

*If yes, please forward to the Leukaemia Foundation your target list and sponsorship proposal before approaching.*

The Leukaemia Foundation will provide:

letter of authority (once approved); literature/posters, signage, raffle books, receipt books, copy of public liability insurance.

Please note, all excess merchandise, literature, signage must be returned to the Leukaemia Foundation in your capital city.

Applicant signature ..... Date ..... / ..... / .....

**Please return completed form along with the completed budget template to:  
The Leukaemia Foundation GPO Box 9954 IN YOUR CAPITAL CITY or fax back to: 1800 50 1010**

**Office use:** Approved by: Community Fundraising Manager

Name .....

Signature ..... Date ..... / ..... / .....

# ABOUT THE LEUKAEMIA FOUNDATION

- **The Leukaemia Foundation is the only national not-for-profit organisation dedicated to the care and cure of patients and families living with leukaemias, lymphomas, myeloma and related blood disorders.**

## How these diseases change lives ...

- In 2007, 9264 Australians are projected to be diagnosed with leukaemia, lymphoma and myeloma; the equivalent of one every hour<sup>1</sup>.
- Of these, approximately 47% are diagnosed with lymphomas, 32% with leukaemias and another 21% with myeloma.
- It is estimated that every two hours, someone loses their life to leukaemia, lymphoma or myeloma.
- The diseases often develop with little warning, requiring immediate, intensive and lengthy treatment. Families in regional areas often need to uproot their lives and relocate to capital cities virtually overnight. In reality it means leaving work, school, family commitments and friends while dealing with the emotional turmoil of diagnosis and immediate treatment.
- They can develop in anyone, of any age, at any time. On average, treatment lasts for eight months but can last for years.
- Leukaemia is the number one childhood cancer in Australia but it is most common in adults (90%)
- Lymphoma is the fifth most common cancer in Australia.
- The incidence of lymphoma in Australia has doubled in the past 20 years for no known reason. It is projected to increase by 30.5% between 2002-2011<sup>1</sup>.

## How the Leukaemia Foundation changes lives ...

- **Mission to Care:** The Foundation provides personalised care and support to patients, families and carers living in all metropolitan, regional and rural areas across Australia. Support may be provided over the phone or face to face at home, hospital or at the Foundation's accommodation centres depending on an individual needs.
- The Foundation's free support services includes information, resources, education and support programs, transportation to and from hospital, a 'home-away-from-home' in the Foundation's fully furnished accommodation close to major hospitals, practical assistance and emotional support.
- **Vision to Cure:** The Leukaemia Foundation funds cutting edge research into better treatments and cures through its National Research Program.
- The Foundation also funds research grants, scholarships and fellowships for talented young researchers to promote innovative research into the causes, diagnosis and treatment of these cancers and related disorders.
- Research is making a real difference in our life-time. 20 years ago, children with Acute Lymphoblastic Leukaemia (ALL) had a 30% chance of survival. Now 80% are likely to survive. There is still a long way to go. Survival rates in adults are still just over 40%.

<sup>1</sup> Cancer incidence projections for Australia 2002-2011 – AIHW (2005)

**For further information or support, please contact the Foundation:  
1800 620 420 or [www.leukaemia.org.au](http://www.leukaemia.org.au)**