



HeartKids Western Australia

Fundraising Guidelines and Application for Authority to Raise Funds

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Fundraising Guidelines & Application for Authority to Raise Funds








Thank you for your interest in raising funds for HeartKids Western Australia (HKWA). HKWA abides by the *Charitable Collections Act 1946*. In granting an Endorsement Letter, HKWA requires that you adhere to the following guidelines. These guidelines are designed to assist any individual, group or organisation who wants to raise funds for HKWA.

HeartKids staff are happy to discuss your fundraising proposal with you. We are here to give whatever advice and support we can.








Please note that you cannot commence fundraising on behalf of HeartKids Western Australia without written approval from the State Manager, HeartKids Western Australia

What we can do to help

-  Offer advice and guidance on event planning;
-  Provide a letter of endorsement to be used to validate the authenticity of the event and its organisers;
-  Provide promotion material, banners;
-  Promote the event internally to HeartKids staff and members;
-  Provide written tax receipts for donors who make donations of \$2 or more and receive no material benefit in return.

If possible we will provide a representative of HKWA to attend. Please understand the volume of requests exceeds the amount of people we have available to attend.

What we cannot do to help

-  Provide on-site staff or volunteer support at your event;
-  Extend our tax exemption to you;
-  Provide funding or reimbursement of expenses;
-  Solicit sponsorship, goods or money for your activity;
-  Provide celebrities or professional athletes for your event;
-  Provide publicity and or media coverage
-  Provide mailing lists of members, supporters, volunteers or employees.









Please note we cannot accept sponsors who have a conflict of interest with our existing sponsors

Getting Started

1. 'Fundraiser' means the individual or organisation holding the fundraising event on behalf of HKWA. Fundraisers do not represent HKWA but are acting on their behalf to raise funds that will be forwarded to HKWA. Fundraisers must make this clear in all dealings with the public, sponsors and supporters.
2. All fundraising activity must be endorsed by HKWA. Once we have received your signed fundraising agreement, fundraising application form and budget outline, and we are satisfied that the fundraising activity fits with the objectives and policies of HKWA we will forward your endorsement letter. HKWA will not endorse fundraising which involves any activity that does not fit with our aims, goals and values.
3. Any documents / promotional material used by the fundraiser must be approved by HKWA. If the fundraiser wishes to incorporate HKWA's logo on any materials or products, prior permission from HKWA's State Manager must be obtained before printing.
4. Third party fundraisers are not covered by HKWA's insurance and therefore you need to seek your own Public Liability Insurance.





Raffles

5. If you intend to hold a raffle where the sale of tickets and declaration of the result takes place on the day and at the same premises and the aggregate value of prizes offered does not exceed \$1000 (small private lottery), no permit is necessary.
6. If you intend to sell raffle tickets to the public for more than one day (standard lottery) you need to obtain a permit from the Department of Racing Gaming and Liquor. In this case, it is your responsibility to submit an application with the Department of Racing Gaming and Liquor. It is your responsibility to submit an application with the Department of Racing Gaming and Liquor and print raffle tickets. The produced raffle tickets must show:

-  Permit number
-  Ticket price
-  Description and value of prizes
-  Ticket number
-  Name and contact number of permit holder
-  Name of organisation
-  Closing date of ticket sales and drawing date
-  Name and date of issue of the publication in which results are to appear

Receipts and Financial Records

7. Your receipt will be issued once the following items have been returned to HKWA;

-  Monies raised
-  Statement of income and expenditure
-  Receipt books
-  Unused raffle tickets

8. Receipts for tax purposes can only be issued to people giving donations of money. As of 1 July 2007, individuals are able to receive a tax deduction for the net amount of a donation made to a deduction gift recipient, which has an associated minor benefit. The deduction will be available for cash donations above \$150, where the value of the benefit received by the donor is no more the 20% of the donation or \$150, whichever is less. If you believe this may be applicable to your event please contact your tax adviser to confirm the exact ruling.
9. HKWA must comply with the obligations and regulations imposed on it by the *Charitable Collections Act 1946*. Therefore, all money collected must be accurately recorded by the fundraiser on a statement of income and expenditure. This must be presented to HKWA within fourteen (14) days of the event.
10. If your event included a raffle, please be aware that the financial records including the ticket butts, details of ticket sellers and prize winners, banking records and unclaimed prizes must be submitted to HKWA at the end of the event. You must also submit a copy of the return sent to the Department of Racing, Gaming and Liquor.

Disclaimer





11. HKWA reserves the right to withdraw its approval for the fundraising / event at any time if it appears that there is a likelihood of the fundraiser failing to adhere to any of the above terms and conditions. Further to this, endorsement letters will not be issued where the viability of the fundraising activity is in doubt.
12. Before undertaking any fund raising activities, HKWA recommends that you obtain independent legal and financial advice in relation to your obligations and any tax benefits you maybe entitled to, as result of conducting such activities.

Application for Authority to Raise Funds

Fundraising terms and conditions

To obtain approval for an Endorsement letter from HKWA the following fundraising terms and conditions need to be accepted and an application to raise funds form completed and submitted for approval.

HKWA will issue you with a letter of approval/endorsement which will then enable you to undertake fundraising on behalf of HKWA when:

-  A written and signed copy of the Application for Authority to Raise Funds has been received.
-  HeartKids WA is satisfied that the fundraising activity will produce an appropriate return after expenses have been deducted.
-  HeartKids WA is satisfied that the fundraising activity fits in with the aims and values of HeartKids WA
-  HeartKids WA is satisfied that the fundraising activity is not high risk.

Please note the fundraiser is not authorised to name HeartKids Western Australia as a beneficiary until the letter of approval/endorsement is issued.

Fundraising for HeartKids Western Australia

1. The Fundraising Activity, including the financial aspects, fundraising, raffles, record keepings and management of the Activity shall be conducted in your (the Fundraiser's) name and is the sole responsibility of the Fundraiser.
2. A Fundraiser has no power to bind HeartKids WA in any manner whatsoever or to take any action or do any act or thing in the name of HeartKids WA. Fundraisers must make it clear when dealing with the public, sponsors and supporters that they are not representing HeartKids WA and they are only raising funds that will be forwarded to HeartKids WA.
3. The Fundraiser indemnifies HeartKids WA against any liability, action, claim, suit, damage, cost and expense (including all legal fees) suffered by HeartKids WA to the extent that a claim or action brought against HeartKids WA is connected to, in relation to, or arising out of, the Fundraiser's:-
 - (a) negligence; or
 - (b) breach of, or default under, this Agreement.
4. The Fundraiser releases HeartKids WA from and indemnifies HeartKids WA against any liability for any injury, accident or other loss, whether physical or financial, suffered by the Fundraiser or its personnel in the course of conducting the Fundraising Activity.
5. HeartKids WA is not able to take a co-ordination role in your Activity, such as soliciting prizes, organizing publicity or celebrities, assisting with ticket sales, or providing goods and services to assist the Fundraiser in running the Activity.

6. The Fundraising Activity needs to be promoted and conducted by the Fundraiser in compliance with all relevant laws and regulations and the Fundraiser must apply for any permits and authorities that may be required. Such permits may include obtaining “Police Clearance or “Working with Children Clearance”. Copies of all permits must be sent to HeartKids WA.
7. HeartKids WA expects a reasonable level of liaison and information regarding your Fundraising Activity. Any changes made from the details provided on the Application to Raise Funds must be reported to HeartKids WA within fourteen (14) days of the date of the change and before the commencement of the Activity.
8. HeartKids WA requires that there be no door-to-door appeal, street collections or telephone solicitation of any kind to the public in connection with the Fundraising Activity.
9. HeartKids WA’s insurance policy does not cover activities conducted by outside organisations and groups. All insurance cover required is the responsibility of the Fundraiser. (e.g. public liability or wet weather insurance for an outdoor event)

Financials

All fundraising events must be self-funding. HeartKids Western Australia will not be held liable for any losses or expenses incurred, by you, in any circumstances.

The Fundraiser must take all reasonable steps to ensure that the expenses do not exceed a fair and reasonable proportion of the gross proceeds obtained from the activity. Expenses should not exceed 40% of the event revenue, not including raffle or auction proceeds.

The proceeds from the Fundraising Activity and a statement of income and expenditure, along with copies of receipts for all expenditure, receipt books, collection tins, unused promotional material, fund raising equipment or stationery are to be forwarded to HeartKids Western Australia within fourteen (14) days of the conclusion of the event. The Fundraiser must keep an accurate record of income, expenses and net proceeds from fundraising activities for twelve (12) months.

Individual tax deductible receipts can only be issued by HeartKids Western Australia for people making monetary donations of \$2.00 or more. If a donor would like a receipt, please send a list including the name, address, phone number and donation amount and a receipt will be issued from HeartKids Western Australia.

Monies raised through a raffle cannot be used to pay any event expenses. All proceeds raised by a raffle need to be donated to HeartKids Western Australia. The only expenses that can be taken out of funds raised by a raffle are those that are strictly raffle related, e.g. raffle ticket printing, and raffle tickets.



Advertising and use of the name and logo

The Fundraiser is not permitted to use the name or logo of HeartKids Western Australia without written approval from HeartKids Western Australia. At no time can your Fundraising Activity be advertised as a HeartKids Western Australia Event. However, it can be referred to as an Event supporting HeartKids Western Australia.

HeartKids Western Australia can allow you to use the tag line “proudly supporting” on all of your promotional material. For example, “this event is proudly supporting HeartKids Western Australia or “funds raised will be donated to HeartKids Western Australia”.

All promotional material, advertisements, media materials and press releases to be used by the Fundraiser in relation to your Activity need to be submitted to HeartKids Western Australia for written approval before public distribution or circulation.

A HeartKids Western Australia Representative may be arranged to attend your Activity depending on availability. At least four weeks’ notice is required.



Application for Authority to Raise Funds

Activity manager details

Name: _____

Name of organisation (if applicable): _____ ABN (if applicable) _____

Address: _____ Postcode: _____

Phone: _____ Mobile: _____ Fax: _____

Email: _____ Website: _____

Type of organisation: Club: _____ Company: _____ Association: _____ Other: _____

Have you ever raised funds for HeartKids Western Australia before? No: _____ Yes: _____

Name of activity: _____

Description of activity: _____

How will the funds be raised (e.g. ticket sales, auction etc.): _____

Proposed date of your activity: _____ proposed time of your activity: _____

Venue name & address: _____

Proposed ticket price/entry fee (if applicable): _____

Has the activity taken place before? (If so, when & how much was raised): _____

Do you have a group of people working on this activity: _____? If so please provide details: _____

Has any person working on the activity had any connection with HeartKids Western Australia (if so, how): _____

How do you plan to advertise the activity (please refer to the fundraising terms and conditions regarding promotional material): _____

Do you have or intend to seek public liability insurance for your activity? No: _____ Yes: _____

If yes, please provide insurance details: _____

Will HeartKids Western Australia be the only beneficiary of funds raised? No: _____ Yes: _____

If no please list other beneficiaries and the percentage distribution of money: _____



Anticipated Income		Proposed Expenditure	
Ticket Sales / entry fee		Venue	
Sponsorship		Catering	
Raffle/s		Audio Visual	
Main Auction		Printing (invites/ tickets /posters)	
Silent Auction		Advertising	
Merchandise		Entertainment	
Donations		Prizes	
Other		Supplies (decorations / gifts / etc)	
		Security	
		Insurance	
		Other:	
TOTAL \$		TOTAL \$	

Estimated Net return to be donated to HeartKids Western Australia \$ _____

Proposed HeartKids Western Australia Involvement

____ Use of HeartKids name and/or logo for publicity purposes (please refer to terms and conditions).

____ A HeartKids representative to attend

____ HeartKids receipt books

____ HeartKids promotional material

____ HeartKids Banners

____ HeartKids collection tins

____ Other: _____

Signed by or on behalf of the Fundraiser:

Yes, I have read and understand the Terms and Conditions of this Agreement and I agree to fully abide by them.

Signature:

Date: