

Dear Supporter

Thank you for considering Lung Foundation Australia ("the Lung Foundation") as the beneficiary of your fundraising event/activity. We are extremely grateful for your support which will help us continue to support the millions of Australians living with lung disease.

To help you coordinate your fundraising event/activity, and in order to comply with various fundraising and charity legislation, the Lung Foundation has compiled the following guidelines that outline our mutual responsibilities and obligations.

On approval of the signed and completed Fundraising Proposal Form, the Lung Foundation will send a 'Letter of Authority' which will include an identification number, bank payment details and other relevant information. This constitutes an agreement, whereby the terms and conditions outlined below in this document will be binding for Lung Foundation Australia and you, the Fundraiser. The 'Fundraiser' is defined as the individual or organisation conducting the fundraising event/activity on behalf of the Lung Foundation.

If you need any further information please don't hesitate to contact our Fundraising team on 02 9222 6204.

Kind Regards

The Lung Foundation Australia Team

FUNDRAISING GUIDELINES & AGREEMENT

1. Authority to fundraise for Lung Foundation Australia

Lung Foundation Australia is legally required to approve and authorise all fundraising events/activities conducted on its behalf by third parties. If your event/activity is approved, the Lung Foundation will send a 'Letter of Authority'. This document can only be issued when:

- a) The Lung Foundation has received a completed and signed Fundraising Proposal Form;
- b) The Lung Foundation is satisfied that the fundraising event/activity will represent the Lung Foundation appropriately, upholding our mission, image and brand;
- c) The Lung Foundation is satisfied that the fundraising event/activity can produce a reasonable financial return after expenses have been deducted; and
- d) The Lung Foundation is satisfied that the fundraising event/activity is not high risk.

The Fundraiser is not authorised to use the Lung Foundation as its beneficiary charity without a written 'Letter of Authorisation'.

Any changes to the details provided in the Fundraising Proposal Form, must be reported to the Lung Foundation before the fundraising event/activity and may result in a new 'Letter of Authority' to be issued or for the original 'Letter of Authority' to be withdrawn.

Approval to repeat an event must be requested from the Lung Foundation each time, unless otherwise authorised.

If you have a business that wishes to donate a percentage of sales over a period of time to the Lung Foundation, you will need to contact our office to make an arrangement that satisfies the Lung Foundation and complies with such an event/activity. Additional paperwork may need to be completed.

2. Fundraising for Lung Foundation Australia

When fundraising for the Lung Foundation, the following terms and conditions will apply:

- a) The fundraising event/activity will be conducted in the name of the Fundraiser and is the sole responsibility of the Fundraiser.

- b) Due to limited resources, the Lung Foundation is unable to take a coordination role in the fundraising event/activity. This includes financial management, human resources, marketing, promotion, operational logistics, sponsorship procurement and soliciting of prizes and auction items. Where possible, advice and support will be offered.
- c) The fundraising activity must be conducted in accordance with all applicable laws and must abide by all federal and state/territory legislation.
- d) The Fundraiser is required to obtain and maintain any necessary insurance, permits, licences, consents and authorisations required for the event/activity. For example, permits are required by Councils and shopping centres for events in their area / on their premises, and state/territory government permits may also be required for the conduct of raffles or prize draws. There are also regulations relating to liquor licensing and preparation of food. State/territory guidelines vary, so you will need to contact your relevant state/territory government body for details. Please contact our office for advice and support if required.
- e) The Lung Foundation does not endorse any fundraising event/activity that involves door knocking, telemarketing, open bucket collections, violent or dangerous activities, or any activities that do not fit with the values of the Lung Foundation.
- f) The Lung Foundation is unable to provide public liability insurance to cover community fundraising events/activities and/or the Fundraiser.
- g) If the Fundraiser plans to solicit contributions, sponsorship or in-kind gifts from businesses, the list of potential business sponsors must be reviewed and approved by the Lung Foundation prior to approaching. A list of all contributions by companies must be submitted when making final remittance to the Lung Foundation.

3. Financial Aspects

With regards to the financial aspects of the fundraising:

- a) It is a requirement of the charitable fundraising legislation that the Fundraiser maintains accurate records of income and expenditure associated with the fundraising event/activity.
- b) Within four weeks of the conclusion of the fundraising event/activity, all proceeds are to be deposited into the designated bank account. The Remittance Form and a copy of the 'Letter of Authority' (these will be provided to you on approval of your proposal) are to be submitted to the Lung Foundation, as well as a statement of income and expenditure. Please do not send cash through the post.
- c) The Lung Foundation cannot pay expenses incurred by the Fundraiser, but expenses can be deducted from the proceeds of the fundraising event/activity, provided they are properly documented and allow for a reasonable financial return (see below).
- d) The Fundraiser must take steps to ensure that expenses do not exceed a fair and reasonable proportion of the gross proceeds obtained from the event/activity (i.e. less than 40% of the total funds raised).
- e) Individual receipts can be issued by the Lung Foundation if the supporter makes a donation of \$2 or more and proceeds from the fundraising event/activity have been received. Please complete the Receipt Request Form (this will be provided to you on approval of your proposal) if individual receipts are required. Note: when the supporter has received goods or services in return for money (e.g. event entry or purchased raffle tickets), a tax-deductible receipt cannot be issued.
- f) The financial aspects, fundraising raffles, record keeping and management of the fundraising event/activity are the responsibility of the Fundraiser, who must comply with the Charitable fundraising Act and Regulations in their state/territory.

4. Media and public relations

With regards to media and public relations:

- a) Due to limited resources, the Lung Foundation cannot undertake media relations for the Fundraiser. Media Guidelines will be provided if the fundraising event/activity is approved.

- b) All media materials and press releases must be approved by the Lung Foundation prior to distribution.
- c) The Lung Foundation must be notified of all planned media activity in advance, and all unplanned media activity immediately.
- d) Any approach made to celebrities for support must be discussed with the Lung Foundation and approved prior to any contact being made.
- e) A representative from the Lung Foundation may be available to attend your fundraising event/activity, however the request must be made well in advance of the event/activity. Determination for representation will be based on staff availability and date of event/activity.
- f) The level, mode and/or percentage of support for the Lung Foundation must be explicitly stated on all materials and correspondence relating to the fundraising event/activity (e.g. 100% of proceeds will be donated; 100% profit will be donated; \$x per item will be donated; income will be split with another charity; etc.)

5. The use of Lung Foundation Australia name and logo

With regards to the use of the name and logo of the Lung Foundation:

- a) The Lung Foundation must always be identified as the 'beneficiary' or 'charity partner' of the fundraising event/activity. The Fundraiser has no rights to the names 'Lung Foundation Australia' or 'Lung Foundation'. In naming the event/activity, 'Lung Foundation Australia' should not be used in the title, however the fundraising event/activity may be promoted as 'proudly supporting Lung Foundation Australia' or similar approved wording.
- b) Prior approval must be sought from the Lung Foundation for any promotional materials (printed or electronic) or advertisements associated with the fundraising event/activity.
- c) The Fundraiser must seek prior approval from the Lung Foundation for the use of the Lung Foundation logo and/or name on any materials or products. This can be done by completing the 'Permission to use Logo and/or URL Form' and returning it to the Lung Foundation.
- d) Permission for logo usage attracts additional conditions, that will need to be negotiated between the Fundraiser and the Lung Foundation, especially if the use of the logo is for marketing activities of an organisation, and a minimum donation may have to be guaranteed.
- e) If logo usage is approved, the Lung Foundation will provide a high resolution version of the logo. Please do not copy it from other sources. Guidelines on how to use the logo will be supplied.

6. Participation of Children

With regards to the inclusion of children in fundraising events/activities:

- a) The Lung Foundation does not encourage the direct use of children in fundraising events/activities or in the media.
- b) Many conditions apply to the involvement of children in a fundraising event/activity, for example in New South Wales, the minimum age for children participating in a fundraising activity as a volunteer is eight years, or as a person receiving payments is 13 years. Please contact your local relevant authority for further information regarding requirements in your state or territory.
- c) If the Fundraiser intends to involve children in their fundraising event/activity, they must explain their plans in their 'Fundraising Proposal Form' as there are specific codes of practice associated with children in fundraising that may apply, including observance of conditions under which children may be used as collectors, the degree of supervision required, conditions of employment and other obligations to protect their welfare and safety. Regardless, the Lung Foundation requires appropriate permission and adult/parent/guardian supervision. For the purpose of fundraising, the Lung Foundation considers a child as anyone under the age of 18.

Event/Activity Fundraising Proposal

Please fill out this form if you would like to fundraise on behalf of Lung Foundation Australia. You must read the Lung Foundation Australia Fundraising Guidelines, before starting the fundraising activity.

Fundraiser: Personal Details

Company / Organisation (if applicable):

Position (if applicable):

Title: Mr Mrs Ms Dr Other

First Name:

Surname:

Address:

Suburb:

State:

Postcode:

Daytime phone:

Mobile:

Email:

Website (if applicable):

What has inspired you to fundraise for Lung Foundation Australia?

How did you hear about Lung Foundation Australia?

Fundraising Details

Type of activity:

Name of activity:

Date(s) of activity:

Time of activity:

Location:

Address:

Suburb:

State:

Postcode:

Description of activity and how the funds will be raised:

Expected attendance:

Target audience:

How much do you hope to raise for Lung Foundation Australia?

How will the activity be promoted?

Are there other beneficiaries besides Lung Foundation Australia: Yes No

If yes, please state the organisations name, describe their involvement and approximate % of funds:

Do you plan to involve groups of children in your fundraising: Yes No

Please provide details:

Will you be running any other activities in conjunction with the fundraising? (please tick relevant boxes)

Raffle Art Union Other (describe)

Chocolate Wheel Bingo

Auction Sweeps

