

FUNDRAISING GUIDELINES



Thank you for choosing to support the Charlie Teo Foundation ABN 60 720 974 820.

These Fundraising Guidelines have been developed to assist individuals, groups and businesses who wish to fundraise for the Charlie Teo Foundation to ensure your fundraiser is successful and complies with relevant fundraising laws.

FOR BUSINESSES

If your fundraiser is related to your business (for example you plan to donate a percentage of sale proceeds to the Charlie Teo Foundation), you may need to complete additional documents. Please contact us for more information.

If you have any questions, please email info@charlieteofoundation.org.au or contact us on 1300 998 701 or (02) 8880 8328.

HOW TO REGISTER YOUR FUNDRAISER WITH US

Before you commence any fundraising, you will need to register your fundraiser with us by following these steps:

- 1. Complete, sign and return the Agreement to Fundraise.**
This is a legally binding agreement made between you (as organiser of the fundraiser) and the Charlie Teo Foundation. A form is included for you to provide us with details about your fundraiser. Please note that these Fundraising Guidelines form part of the Agreement to Fundraise.
- 2. If your fundraiser is approved, we will issue you with an Authority to Fundraise.**
This confirms you have permission to fundraise on our behalf. It is valid for a set period as indicated in your Authority to Fundraise. Please note that Australian states and territories have their own fundraising laws (e.g. *Charitable Fundraising Act 1991* (NSW)). Under these laws, anyone wishing to fundraise for the Charlie Teo Foundation must hold an authority to fundraise issued by us before commencing fundraising. If you need to renew an expired authority to fundraise, you can do so by submitting a new Agreement to Fundraise to us.

YOUR RESPONSIBILITIES IN CONDUCTING YOUR FUNDRAISER

It is your responsibility to ensure your fundraiser complies with relevant fundraising laws in your state or territory. You are responsible for the general management of your fundraiser including promotion, fundraising activities, donations, sponsorship, record keeping, insurance, safety and securing any necessary permits or permissions.

Due to limited resources, we are not able to help conduct your fundraiser, such as assist with ticket sales, sponsorship, solicit prizes, organise media or publicity or provide goods or services to run the fundraiser.

As we are not the fundraiser organiser we are unable to cover any liability on your behalf. Please ensure that any space or venue used for your fundraiser has the required public liability insurance. You agree to release the Charlie Teo Foundation to the fullest extent permissible under law for all claims, except where such liability arises because of the negligence of the Charlie Teo Foundation.

We require that there be no door-to-door appeals, street collections or telephone solicitation to the public in connection with the fundraiser.

You are to conduct the fundraiser in the manner set out by you in the Agreement to Fundraise. You must seek our approval as soon as possible to any proposed changes to the fundraiser, which may be withheld in our absolute discretion.

PROMOTING YOUR FUNDRAISER

Under your Authority to Fundraise, you will be permitted to use the Charlie Teo Foundation logo for the sole purpose of promoting your fundraiser. Our logo must be used in accordance with the Charlie Teo Foundation brand guidelines, available on our website.

Please note that all advertising and promotional material must be approved by us before publication and must clearly and prominently state:

- That the fundraiser is in support of the Charlie Teo Foundation;
- Your name; and
- The percentage of the proceeds to be donated to the Charlie Teo Foundation.

Additional requirements apply to advertising if you are conducting the fundraiser as part of your business. Please contact us for more details.

EXPENSES AND RECORD KEEPING

Depending on the size of your fundraiser, we may require you to submit a fundraising budget for our approval. Any budget should be used as a planning tool for how you can reach your desired fundraising outcome.

The law requires you to keep accurate records of income and expenditure relating to your fundraiser including particulars of all items of gross profit received, expenses incurred and transactions in relation to the fundraiser. You can use our template income & expenses table to do this.

The Charlie Teo Foundation cannot pay any expenses for conducting your fundraiser, however you can deduct your necessary expenses from the proceeds of your fundraiser, provided they are documented. **Expenses must not exceed 40% of your gross proceeds.**

You agree that you will not retain any part of the gross profits raised during the fundraiser as a commission, wage or other fee. All profit (minus expenses) must be paid to the Charlie Teo Foundation.

COMPLETION OF FUNDRAISER

Within 30 days of the end of your fundraiser, please complete and return to us the Fundraising Completion Form including the income and expenses table attaching receipts of expenses. The proceeds of your fundraiser must also be received by us within 30 days of the end of your fundraiser. When transferring or depositing money, please use your full name or name of the fundraiser in the description field so that we know who the money has come from.

ISSUING RECEIPTS

Once we have received the proceeds of your fundraiser, on request the Charlie Teo Foundation can issue individual receipts for the amount donated for tax deductions if a supporter donates \$2 or more. Where a supporter has received something in return (e.g. raffle tickets, auction prizes or advertising under a sponsorship arrangement), a tax-deductible receipt is not applicable and cannot be issued.

SPONSORSHIP

If you seek out sponsorship of your fundraiser, any sponsorship arrangements must be directly between you as organiser of the fundraiser and the sponsor. The Charlie Teo Foundation will not receive funds directly from your sponsors. Any sponsorship payment you receive forms part of the gross profits of your fundraiser, with the net proceeds to be paid to us on completion of your fundraiser as described in these Fundraising Guidelines.

Please be aware that sponsorship is not a 'gift' if the sponsor receives something of value in return for the sponsorship such as advertising or promotion. In such circumstances, a tax-deductible receipt is not applicable and cannot be issued to the sponsor.

We suggest you include the following wording in any agreement with your sponsors:

The sponsor acknowledges that the sponsorship payment is to be paid directly to the organiser of the fundraiser, not to The Charlie Teo Foundation. Sponsorship is not a gift if the sponsor receives something of value like advertising or promotion in return for the sponsorship payment and therefore a tax-deductible receipt is not applicable and cannot be issued.

UPHOLDING THE VALUES OF THE CHARLIE TEO FOUNDATION

The values held by a charity shape its direction and philosophy of operation. At the Charlie Teo Foundation, we believe in community, honesty and hope.

In conducting the fundraiser, you agree to refrain from doing anything which may reasonably be expected to damage the goodwill, reputation or integrity of the Charlie Teo Foundation.

FUNDRAISER: STEP-BY-STEP GUIDE

To help you conduct your fundraiser, here are some helpful steps from start to finish to ensure your fundraiser is a success:

1. Complete, sign and return the Agreement to Fundraise.
2. If your fundraiser is approved, we will issue you with an Authority to Fundraise.
3. Plan your fundraiser. Notify us as soon as possible of any proposed changes to your fundraiser so we can approve them.
4. Promote your fundraiser. Seek our approval of your promo materials. Use our logo as permitted.
5. Hold your fundraiser. Have a great day!
6. Bank the proceeds and complete and return the Fundraising Completion Form within 30 days. Ensure your actual income and expenses from the fundraiser are properly recorded.
7. Receive your Certificate of Appreciation from the Charlie Teo Foundation.
8. Plan your next fundraiser!