

Garvan Research Foundation Community Fundraising Guidelines

Thank you for your generous offer to raise funds for the Garvan Institute of Medical Research. We are very grateful to the many individuals, community groups, organisations and companies who support the vital research work of the Garvan by holding external events or activities to help raise funds for medical research. You may wish to raise funds for Garvan research in general, or for a specific area of interest.

We have developed these guidelines to both assist you in your fundraising efforts as well as outline your responsibilities when fundraising for Garvan. Please read through these guidelines carefully before filling out a *Proposal to Raise Funds* form.

Proposal to Raise Funds

Once you have thought through both the scope and details of your event/activity to raise funds for the Garvan, the next step is to fill out a *Proposal to Raise Funds* form so that Garvan can assess your application. Applications are approved based on whether we are satisfied that:

- the event/activity is in line with Garvan's aims and values
- the event/activity will produce a reasonable return after expenses
- the event/activity is not high risk
- applicants have appropriate experience to run the event/activity
- applicants have understood and agreed to our fundraising guidelines

Every event/activity will have risks associated with it which also means potential risks for Garvan. Risks include physical harm to participants or contributors to the event/activity, not being able to raise the anticipated funds as well as the risk to Garvan's reputation (for example if the event/activity is not well managed or receives bad publicity). Your application will be assessed on its risks, but most importantly how the risks will be managed. It is essential that you continue to manage all risks if your event/activity is approved.

To ensure your event/activity meets our criteria we may contact you to discuss the proposal further.

Authority to Fundraise

Any person or organisation wishing to raise funds in New South Wales must, by law, have an 'Authority to Fundraise'. Once your event/activity is approved, we will provide you with confirmation and a letter giving you legal 'Authority to Fundraise' for Garvan. Until you have received this letter you are not authorised to fundraise, or advertise that you will be fundraising, for Garvan. Each state has different legislation, so please contact us to discuss requirements if you are interested in raising funds in a state other than NSW.

It is important to continue liaising with Garvan after you have received initial approval for your event/activity. Additional or altered plans for the event/activity must be approved by Garvan.

It is also important for you to remember that the event/activity you hold will not be a Garvan event/activity. It is an event/activity to raise funds that will be donated to the Garvan upon the completion. When promoting your event/activity, suggested wording is: "*Funds raised will support the breakthrough medical research of the Garvan Institute...*"

What Garvan Can Provide

Garvan does not have the resources to assist with each event/activity individually, but on request, subject to resources and availability may be able to supply:

- Garvan information leaflets
- Garvan disease fact sheets
- Garvan newsletter *Breakthrough*
- Garvan donation forms (which we will process and receipt)
- Garvan banners or posters for the event

We also understand that some events may need a representative of the Garvan to either speak or accept a cheque on behalf of the Garvan, however due to the large number of requests we cannot guarantee that a staff member will be able to attend your event/activity. Please let us know on your *Proposal to Raise Funds* form if you need a Garvan representative and we will let you know if this is possible.

Any additional needs you have to carry out your event/activity should be outlined on your *Proposal to Raise Funds* form.

Finances

Accurate records must be kept to enable the Garvan to comply with the regulations of the Charitable Fundraising Act 1991, this means you must:

- Keep a balance sheet which records the income and expenditure for your event/activity.
- Expenses must be kept to a minimum and the fundraiser must take all reasonable steps to ensure that the total expenses are no more than 30% of total proceeds.
- Expenses must be recorded and accounted for.
- If you are planning a large event; open a special bank account and close it at the end of your event
- Money raised and the above financial documentation must be returned within 14 days of the event/activity.

Money raised should be returned as a lump sum, however in some circumstances Garvan can assist in processing payments including credit card donations. **If you require payments or receipts to be processed, please return payments or payment details to Garvan immediately after the event/activity.**

Garvan can also provide official receipts as required, however it is important to note that not all payments will be tax-deductible. As a general rule only straight donations (for which nothing is given in return) are tax-deductible, items such as tickets or auction purchases are not normally tax-deductible. If contributors will require tax-deductible receipts, you should note this on your application as you will need to discuss this with Garvan before your event/activity.

Legal Accountability

The fundraising event/activity will be the sole responsibility of the approved applicant including ensuring all requirements of current and relevant laws and regulations are met. These may include:

- Insurance (i.e. it is the responsibility of the applicant to arrange public liability cover)
- Licences and Council Permission (i.e. local council approvals)
- The provisions of the Charitable Fundraising Act and Regulation

For more information please read the Charitable Fundraising guidelines issued by the NSW Office of Liquor, Gaming and Racing at <http://www.olgr.nsw.gov.au/>

Use of the Garvan Name and Logo

When we approve your event/activity we may endorse the use of Garvan's name or logos for your promotional material. However each time you wish to produce materials (either electronic or physical) with Garvan's name or logos you must obtain written approval from us first. This includes, but is not limited to, press releases, brochures and signage. Approval must be granted by Garvan before printing, distributing or displaying publicly.

Our logos are registered trademarks and are protected by law and must not be changed or modified in any way. If we approve the use of our logos we will provide the logos to you along with our style guides.

It is important that you refer to the appropriate Garvan entity for different purposes. For all publicity and promotion purposes please use '**Garvan Institute of Medical Research**'. For all cash gifts (cheque, credit card or postal orders) please ensure payment is made to '**Garvan Research Foundation**'.

Sponsors

Approaching companies for sponsorship for your event/activity can be a great way to minimise expenses, however it is important to gain approval from Garvan before approaching sponsors to ensure that they are not existing or prospective sponsors of Garvan.

Publicity & Promotion

We want your fundraising event/activity to be a fantastic success and hope that many people will support it. We have found that the best support comes when people have some interest in the area that you are fundraising for, or have either read or heard about the event/activity. The most common ways of gaining publicity are:

- a story in your local or regional newspaper or a specialised publication
- talkback radio
- an article in your work, church or school newsletter
- producing a poster or flyer to be distributed through targeted sources
- circulate information through your local Probus, Lions, Rotary clubs and specialised interest groups
- recruit the help of friends, family and colleagues to spread the word
- banners to promote the event

Helpful Hint - always promote - first and foremost - the goal of your fundraising drive. If you are fundraising for a particular program at the Garvan such as Breast Cancer or Mental Illness ensure that this message is heard by the people you would like to attract to the event/activity.

Once again, we thank you for thinking of the Garvan as the beneficiary of your fundraising. We hope this information has been useful and has given you some helpful guidelines. To begin the process we ask that you complete the *Proposal to Raise Funds* form attached. Should you have any questions please do not hesitate to contact us.

Monica Schneider

Fundraising Coordinator

Garvan Research Foundation

The marketing and fundraising arm of the Garvan Institute

Level 6, 384 Victoria Street
DARLINGHURST NSW 2010

Email: m.schneider@garvan.org.au
Ph: 02 9295 8117 Fax: 02 9295 8151

Proposal to Raise Funds for the Garvan Institute of Medical Research



Applicant's Contact Details

Name/s: _____

Organisation's Name: *(if applicable)* _____

ABN: _____

Address: _____

Suburb: _____

State: _____

Postcode: _____

Phone: _____

Fax: _____

Mobile: _____

Email: _____

Event /Activity Details: *(Please attach any further information you have to this form)*

Title of Proposed Fundraising Event/Activity: _____

Description of Event/Activity: _____

Main reason and objective for running event/activity: *(eg Raise awareness, raise funds for a specific area of research, an annual event for which you select a charity to benefit, product promotion, etc)*

To which area of research would you like proceeds to go?

General Research Specific area of Research _____

Target Audience: _____

Anticipated number of participants: _____

Proposed Date/Time of Event/Activity: _____

Venue: _____

Proposed Advertising/Promotion: _____

Fundraising strategies: *(Please ensure you list all the fundraising methods you intend to use)*

Ticket sales Raffle Auction Merchandise sales Other _____

Do you have or will you be seeking Public Liability Insurance for your event/activity?

Yes No *(If you already have Public Liability Insurance, please attach documentation)*

Support requested from Garvan:

Garvan information leaflets Garvan donation forms (which we will process and receipt)

Garvan newsletters *Breakthrough* Garvan banners or posters for the event

Garvan disease fact sheets Garvan representative at the event

Other _____

Event/Activity Risks

Risks

Strategies to manage risks

Financial Details

Anticipated Income Items

Amount

	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Anticipated Expense Items

Amount

	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Will you be giving a percentage of the proceeds to other charities? Yes No

If yes, who are the other charities? _____

If yes, what percentage will be given to Garvan? _____

Total anticipated donation to Garvan: \$ _____

Will you be processing individual payments/donations received and providing us with a lump sum, or will you require our assistance to process payments?

I will be providing a lump sum I will require assistance from Garvan to process payments

Other: _____

Will you require Garvan to provide tax-deductible receipts to individual contributors?

Yes No

Have you, or your organisation, ever raised funds for a charitable organisation by managing a similar event/activity? Yes No

If yes, please state the name of the charity/type of fundraising/fundraising results: _____

Name of sponsors secured or that you intend to approach: _____

Agreement

As the organiser of the proposed event, I agree to the fundraising guidelines of the Garvan Research Foundation and indemnify the Garvan Research Foundation from and against any claims for injuries or damage arising at or from the event that is the subject of this application.

Name of applicant: _____

Signature of applicant: _____ **Date:** _____

Please return this form to:

Monica Schneider - Fundraising Coordinator

Garvan Research Foundation

Level 6, 384 Victoria Street

Darlinghurst NSW 2010

Email: m.schneider@garvan.org.au Ph: 9295 8117 Fax: 9295 8151

