

# Fundraising Guidelines: Community



*Continuing in the ANZAC Spirit*

# Thank you

*For your interest in fundraising for RSL LifeCare. Your dedication to our causes really means a lot to us. We appreciate the generosity from individuals, community groups and businesses that will assist us in raising awareness and funds to support our residents in aged care. No matter what your idea or how much you want to raise, you can get involved today and make a real difference – it's easier than you think.*

## About RSL LifeCare

RSL LifeCare is a charitable organisation that was formed in 1911 to provide care and services to war veterans. Services were initially provided at Bare Island in Botany Bay until moving to Narrabeen in 1939. From small beginnings providing care and services to just a handful of veterans, the organisation has grown to be one of the largest senior living services in Australia



Caring for over 7,000 people across independent living, community care, assisted living, dementia and nursing homes, we have developed an extensive range of services that fosters independence and provides social, clinical, emotional and spiritual support. Despite our growth and the passage of time, RSL LifeCare remains true to its original aim and mission – *Continuing in the ANZAC spirit* – to provide a home of peace and security to senior Australians.

## Where your fundraising goes

RSL LifeCare greatly acknowledges the support provided by donors and fundraisers. Founded on donations and volunteer effort over a century ago, these two pillars continue to be pivotal to the success of RSL LifeCare, be it:

- Support for the development of innovative programs of care and wellbeing
- Support for more simple initiatives that enhance the amenity and lifestyle of our people “above and beyond” what could otherwise be expected, helping us to add *life to years and years of life*.

## How to get started

Before you race off and start organising your fundraising event, check out our simple step-by-step guide to help you make your event a success. If you get stuck at any point in the process, drop us an email or give us a call – we're always happy to help.

### Choose your activity

Choose a fun event, activity or adventure. Your event could be something as simple as a cake stall or morning tea. Some suggestions:

- BBQ/sausage sizzle
- Walkathon
- Movie night
- Quiz
- Non-uniform day
- Morning tea
- Fun run

Pick a date that's suitable for your event, activity or adventure.

### Scope your event

Read through these guidelines to understand the responsibilities of a fundraiser, the management of funds raised and the legislative requirements of fundraising. Many laws differ in every state – particularly for raffles and competitions. Keeping your activity simple reduces the “red tape”.

### Budgets and targets

Try to keep your costs to a minimum, use volunteers and use equipment and materials that could be second hand, donated or borrowed. Set an achievable fundraising target to keep yourself motivated.

### Make it official

Before you commence fundraising you need to register your event by completing the Application to Fundraise form at least ten (10) business days before the activity. This informs us of your plans for fundraising. If RSL LifeCare is satisfied that the fundraising activities are in line with the philosophy and policies of our organisation and meet statutory requirements, you will be issued with a written authorisation to fundraise on behalf of RSL LifeCare. This is a legal requirement and you cannot begin to fundraise without the written authorisation.

### Authority to fundraise ID

When you receive your written authorisation to fundraise, you will also be issued with a fundraiser ID number and a fundraiser ID card. These must be displayed during the fundraising.

### After your event

Within ten (10) days of finishing your event, funds raised must be forwarded to RSL LifeCare together with an Income and Expenditure Statement. At the same time, any ID badges, receipt books and donation buckets issued should be returned to RSL LifeCare.

### We'd love to hear from you

Keep in touch along the way with any questions, challenges or stories of success. We'd love photos of people enjoying your event.



## Guidelines

The fundraiser must agree to the terms and conditions contained in these guidelines by signing and returning the Application to Fundraise. If approval to fundraise is granted, these terms and conditions will form the basis of any dealings between RSL LifeCare and the fundraiser in relation to the fundraising event.

RSL LifeCare only undertakes fundraising in NSW and the ACT.

The following types of activities are NOT endorsed or permitted to be conducted on behalf of RSL LifeCare:

- The explicit endorsement of a specific commercial product or service
- The production, sale or promotion of products or services that could damage health
- Fundraising centred on the consumption of alcohol
- Association with an event that involves violence or dangerous activities e.g. boxing
- Activities that are demeaning or degrading
- Using a trader or other party that is paid
- Telemarketing
- Using a donations bin or bag
- Using children to conduct fundraising
- Soliciting donations from people occupying a motor vehicle
- Preventing relations with other potential supporters

### **Additional requirements when funds raised in the event or activity is expected to be greater than \$10,000**

If the charitable fundraising activity is expected to generate more than \$10,000 for a single event or activity, the Application to Fundraise form must be accompanied with a fundraising agreement that provides more information and clearly sets out:

- Purpose of the fundraising, whether specific or general
- Description of all activities to be included in the fundraising
- Expected participants, audience and location
- Name and nature of the planned activity
- Timing and duration of the activity
- Draft budget, income and expenditure
- Details of planned management of funds
- Examples of planned marketing and promotion
- Risk assessment and management
- Copies of insurances

### **Authorisation to fundraise on behalf of RSL LifeCare**

1. Fundraisers must provide a clear written description of the nature, extent and duration of the fundraising event when completing the Fundraising Application form. The fundraiser should also include an estimated budget and provide information about the group or individuals organising the event.
2. By law, any individual or organisation organising a fundraiser must have a written authorisation to fundraise issued by RSL LifeCare. This authorisation will be issued if RSL LifeCare deem the fundraising event will produce a reasonable return after expenses have been deducted; the fundraiser agrees to supply a complete record of income and

expenditure with supporting receipts and invoices within ten (10) days after the conclusion of the event; the fundraising activity fits in with the aims and values to RSL LifeCare and the fundraising event is not considered high risk.

3. A fundraiser ID Card will be issued to the approved fundraiser. The ID Card must be displayed when the fundraiser is collecting monies or conducting the fundraising event. The written authorisation to fundraise on behalf of RSL LifeCare and ID Card will provide a fundraiser ID number that should be included in all correspondence with RSL LifeCare.
4. The fundraiser is not authorised to use RSL LifeCare as its beneficiary charity until it has received the written authorisation to fundraise. The written authorisation to fundraise is issued for a period no longer than twelve (12) months (or a period specified by RSL LifeCare to the fundraiser). Within ten (10) days following completion of the fundraising event the written authorisation to fundraise, ID Cards, records of income and expenditure and accompanying receipts and any used or unused receipt books and/or donation buckets must be returned to RSL LifeCare.

### Organising the fundraising event

1. The fundraising event must be conducted in the name of the fundraiser and is the sole responsibility of the fundraiser. The fundraiser must make it clear in all dealings with the public, sponsors and supporters that they are not employees or agents of RSL LifeCare, nor are they acting in any other representative capacity.
2. RSL LifeCare is not able to take a coordination role in organising the fundraising event and its officers cannot assist in soliciting prizes, organising publicity, or providing goods or services to assist the fundraiser in the running of the fundraising event.
3. RSL LifeCare does not provide public liability insurance coverage for fundraisers.
4. The fundraiser must keep RSL LifeCare up to date throughout planning for the fundraising event and must not proceed with the fundraising event without RSL LifeCare's prior consent.
5. For fundraising purposes, a child is anyone under the age of 15. RSL LifeCare does not support the use of children in fundraising events.
6. The fundraiser verifies that they are in proper physical/mental condition to organise and run the fundraising event and acknowledge that they are aware of the risks involved and voluntarily agree to assume those risks.

### Auctions/selling goods to raise money

The sale or auction of any good or service to benefit RSL LifeCare must be approved in writing by the organisation prior to the sale or auction event. An authority to conduct fundraising auctions or sales must be approved in writing. Please contact the Manager, Fundraising and Events, RSL LifeCare on (02) 8978 4856 or [donations@rsllifecare.org.au](mailto:donations@rsllifecare.org.au) for more information.

## Raffles

Confirmation of legislative requirements applicable to your state must be provided if you intend to conduct a raffle. Further information can be found online through the [Australian Tax Office](#). In general, printed raffle tickets must show:

- Permit number (if applicable)
- Ticket price
- Description and value of goods
- 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.

## Tax deductibility

Tax deductible receipts – receipts for tax purposes can only be issued to for cash donations of \$2 or more. The following payments do NOT give rise to the issue of a tax-deductible receipt:

- Event entry fees
- Raffle ticket purchases
- Purchase of goods (e.g. chocolates, merchandise) or services
- Purchase of goods and services at an auction except where the payment at auction is more than the market value of the item. Where such payment has been made, the value which is more than the market value would attract a deductible receipt.

## RSL LifeCare name and logo

1. The event will not be a RSL LifeCare event, but an event to raise funds for donation to RSL LifeCare. If the fundraiser wishes to refer to or promote RSL LifeCare subject to these Fundraising Guidelines, it must refer to RSL LifeCare as "RSL LifeCare". The fundraiser has no right to the name "RSL LifeCare" nor is the fundraiser given the right to raise funds in that name other than as set out in these Fundraising Guidelines.
2. Any use of RSL LifeCare's name and logo must be approved. Each fundraising event will be evaluated on a case by case basis and it is at the sole discretion of RSL LifeCare whether name and logo usage are granted.
3. All references to RSL LifeCare in all promotional material (e.g. pamphlets, brochures), including text and images, whether taken from RSL LifeCare's website and print materials or another source, must be submitted to RSL LifeCare for approval prior to publication. In some circumstances RSL LifeCare may need to issue express permission for a specific use of RSL LifeCare's trademark or other brand elements and images owned by RSL LifeCare.
4. If permission to use the RSL LifeCare logo is granted, the fundraiser must not alter, reproduce or amend the logo in any way that breaches the integrity of the trademark design (e.g changes to colour, stretching or skewing original dimensions, cropping, or additions to the design). RSL LifeCare may provide approved logo files for the fundraiser.



5. RSL LifeCare may approve the use of an acknowledgement stating the relationship between the fundraising event and RSL LifeCare. Suggested wording includes:

*“proudly supporting RSL LifeCare”; or  
“proceeds raised will go to support RSL LifeCare”*

6. RSL LifeCare cannot undertake media relations on behalf of the fundraiser but may provide advice on producing media materials. Please notify RSL LifeCare if you intend to approach any media regarding your fundraising event. All printed material, such as media releases must be approved by RSL LifeCare. Printed material must be forwarded to RSL LifeCare for approval prior to being printed or circulated

### **Money management – finance, records and receipting**

1. The financial aspects of fundraising, record-keeping and management fundraising event are entirely the responsibility of the fundraiser. The fundraiser must comply with the Charity Laws and Regulations in their State or Territory. That is the in NSW *Charitable Fundraising Act 1991 (NSW)* and the *Charitable Fundraising Regulation 2015 (NSW)* and the ACT the *Charitable Collections Act 2003 (ACT)* and the *Charitable Collections Regulation 2003 (ACT)*.
2. The Charity Laws and Regulations highlight the need to protect the public interest and accordingly RSL LifeCare requires that fundraisers:
  - Keep accurate financial records (including retention of receipts and invoices) and provide RSL LifeCare with an accurate record of income and expenses within four (4) weeks after the conclusion of the fundraising event. A template Income and Expenditure Statement is provided for this purpose.
  - RSL LifeCare cannot pay expenses for the fundraising but you can be reimbursed for expenses necessary to conduct the fundraising event from the proceeds of your event, provided they are properly documented. (As a guide, total expenses should be less than 30% of total proceeds).
  - Funds raised for donation to RSL LifeCare cannot be used to make another donation to another organisation.
  - Any GST associated with the cost of fundraising is the responsibility of the fundraiser.
  - On request, RSL LifeCare may provide official RSL LifeCare receipt books and donation buckets. It is important that these books and buckets be always kept in a safe and are returned to RSL LifeCare at the end of your fundraiser.
  - RSL LifeCare can provide official receipts for donations towards approved fundraising events. Tax-deductible receipts can only be issued to people *donating* money of \$2 or more, where the donation is a gift (i.e. the donor received nothing of material value in return). The fundraiser must keep a register of all attendees/supporters eligible for a tax-deductible receipt. Individual receipts will be sent to the fundraiser for distribution to attendees/supporters. RSL LifeCare will provide the fundraiser with guidance for using

receipts. It is the responsibility of the fundraiser to familiarise themselves with these, and understand:

- › Circumstances when a receipt can be issued and to whom. Ticket purchases (e.g. raffle), entry to an event, donations of goods or services and auction purchases are NOT tax deductible.
- › The legal implications of issuing receipts and the necessity of returning official receipt books (used and unused to RSL LifeCare within ten (10) days of the fundraising event conclusion; and
- › The reconciliation of funds.

## Banking

All monies must be sent either by cheque or money order to the Manager, Fundraising and Events, RSL LifeCare, PO Box 56, Narrabeen NSW 2101.

Alternatively, you can deposit the money directly into RSL LifeCare's bank by contacting the Manager, Fundraising and Events.

Your income and expenditure statement together with copies of receipts and invoices are to be returned at the same time.

## Legal implications

The fundraiser must comply with all relevant State or Territory Legislation for fundraising and apply for any permits and authorities that may be required. NSW and the ACT have their own legislation, which should be checked by the fundraiser. The fundraiser agrees that the information provided to RSL LifeCare must be made available to regulatory authorities on request.

## Privacy policy and information collection

This privacy policy sets out below how RSL LifeCare uses and protects any information that is provided to the organisation via any community fundraising event or via monetary donations pursuant to the National Privacy Principles (NPP) in the Commonwealth Privacy Act 1988.

RSL LifeCare is committed to ensuring that your privacy is protected. Should RSL LifeCare ask you to provide certain information by which you can be identified, you can be assured that it will only be used in accordance with this privacy statement.

RSL LifeCare Limited (ACN 000 048 957) ("RSL LifeCare") respects the privacy of individuals and is committed to protecting personal information that individuals provide. RSL LifeCare is further committed to complying with the obligations of the Australian Privacy Principles (APP) as set out in the Privacy Act 1988 (Cth) (the Act).

RSL LifeCare's full privacy policy can be obtained from our website <http://rsllifecare.org.au/about-rsl-lifecare/Privacy/>

e | [donations@rsllifecare.org.au](mailto:donations@rsllifecare.org.au)      † | (02) 8978 4856 or (02) 8978 4856  
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