



beyondblue



Fundraising Guidelines

Essential information for community fundraisers



Raising community awareness and funds for *beyondblue*

Thank you for considering raising funds to support *beyondblue*. *beyondblue* greatly appreciates support from the community and the generosity of individuals and organisations who conduct and support activities held to benefit our work.

It is important to note upfront that *beyondblue's* objective in the community is to raise awareness about depression and anxiety and where to get help. *beyondblue* appreciates assistance from the community with regard to fundraising, but we request that you make raising awareness of depression and anxiety the focus of your community activity. To help with this, *beyondblue* is able to provide free resources and information about depression and anxiety for distribution at the activity.

To ensure your activity is safe, rewarding and fun, *beyondblue* provides the following step-by-step guide. The guide will assist to outline your responsibilities in organising a safe and responsible activity. It will help you to develop an activity that minimises risks to you, other participants and to *beyondblue*, and provide guidance in relation to important State and Territory legislation and local government regulations.

By law, *beyondblue* is required to approve and authorise all community-based fundraising activities involving members of the public and volunteers where the funds raised will be donated to *beyondblue*. Approval will be considered once we have reviewed your fundraising application.

When reviewing your application, we will consider the following:

- your safety
- the safety of others
- that the proposed activity meets the standards and requirements of *beyondblue*
- that the proposed activity is compliant with State or Territory laws, and
- that the proposed activity meets the requirements of your local fundraising authorities or your local council.

To get started, please follow the six-step guide for community fundraisers on page 3.



Photo: VicHealth

How donations are allocated

Donations received from individuals and organisations after a fundraising activity will be allocated to the *beyondblue* Research Ancillary Fund Trust (ABN 41 688 712 705) (*beyondblue* Trust) to help *beyondblue* undertake or commission high-quality, independent research into depression, anxiety and related disorders. Such research contributes to improving treatments, knowledge and clinical practice, and informs all of *beyondblue's* evidence-based programs, campaigns and activities.

beyondblue's research always involves people who have experienced depression and/or anxiety. Funds are strategically allocated by the trustees of the *beyondblue* Trust to research which aims to bridge the gap in knowledge about depression and anxiety. One hundred per cent of donations to the *beyondblue* Trust are allocated to research – no administration fees are applied. All research findings are freely available on the *beyondblue* website – to find out more, visit www.beyondblue.org.au and click on **Research**.

The six-step guide for community fundraisers

Step 1 - What would you like to do?

Decide what type of fundraising activity you would like to organise.

Examples of activities include community forums, morning teas, casual dress days at work or school in return for a gold coin donation and events.

Please note: The following types of activities are **not** generally endorsed or permitted to be conducted on behalf of *beyondblue*:

- ✗ tin rattling and raffles
- ✗ door-to-door fundraising
- ✗ cause-related marketing or percentage of proceeds (e.g. 10c from every product, book or film sold goes to *beyondblue*)
- ✗ selling food, clothes, bric-a-brac, machinery, alcohol, cakes, or chocolates to raise funds for *beyondblue*
- ✗ high-risk activities which may include some vehicular, water-based and air activities
- ✗ alignment with any pharmaceutical, gambling, alcohol or tobacco organisations.

Please note: *beyondblue* can only accept fundraising proposals to participate in walks, runs and cycle rides where they take place as part of organised events and appropriate supports are in place to look after the safety of you and the public. Unfortunately *beyondblue* is unable to provide logistical support to individuals or authorise you to set up your own event of this nature. If you are interested in taking part in an organised event to raise funds for *beyondblue*, there are many opportunities available. These include **Run Melbourne** in Victoria, **City to Surf** in Perth and Sydney, **Cycle Queensland** and other local runs, walks and cycle rides.

Please note: *beyondblue* does not generally accept gifts of property.

Step 2 - Is my activity legal? Do I have to comply with any laws?

Understanding your responsibilities, including fundraising laws in your State or Territory, is important. Depending on what activity you decide to conduct, you may need to check with local authorities to make sure you comply with local regulations.

Step 3 - Will my activity be suitable to *beyondblue*?

Once you've decided on your activity, you will need to complete and sign the *Proposal to Fundraise* form on page 9 and send it to *beyondblue* for consideration.

***beyondblue* will usually provide a response within two weeks from the date of receipt.**

Step 4 - What will *beyondblue* do?

beyondblue will review your *Proposal to Fundraise* and, if the proposal is successful, *beyondblue* will provide you with an *Authority to Fundraise* letter.

An *Authority to Fundraise* letter will only be provided once *beyondblue* is satisfied that the proposed activity meets these Fundraising Guidelines and provides a reasonable net return on your investment of time and effort.

Step 5 - *beyondblue* has authorised my activity ... what now?

You can start organising your activity! You may like to form a committee of volunteers/friends to help you.

You will need:

- a plan
- a budget.

You may also need a permit from your local government or fundraising authority.

Step 6 - The activity is over ... what now?

Please fill out the *Fundraising Evaluation* form on page 11 and deposit the funds raised to *beyondblue* within 28 days of completion of your fundraising activity (see page 6 for further details).

As a small organisation, it is not always possible for *beyondblue* to provide representatives to attend fundraising activities or collect funds raised. *beyondblue* can however, provide a free DVD to play at your activity featuring a general thank you message from *beyondblue* Chairman, The Hon. Jeff Kennett AC. Please contact the Fundraising Co-ordinator on (03) 9810 6100 to order a copy of the DVD.

Please read these Fundraising Guidelines for more detailed information about fundraising on behalf of *beyondblue*.

Understanding your responsibilities

The fundraising activity must be conducted in the name of the person or organisation named in the *Authority to Fundraise* letter (the Community Fundraiser). The Community Fundraiser, not *beyondblue*, will be solely responsible for the co-ordination and management of the activity, along with any finances, prizes, publicity and/or goods or services required to run the activity.

The Community Fundraiser must ensure that its officers, employees, agents, partners, volunteers, contractors and associates do not claim to represent *beyondblue*, nor claim to have any authority to act on behalf of *beyondblue*.

The fundraising activity is not, and must not be advertised as, an official *beyondblue* activity.

Public liability insurance

It is the Community Fundraiser's responsibility to ensure adequate public liability insurance cover is held in relation to the fundraising activity.

Activities which may be deemed risky

beyondblue reserves the right to refuse to grant authority for activities that it deems are too dangerous or pose an unacceptably high risk to you or the public. This may include (but is not limited to) activities involving:

- animals or animal rides
- motor vehicle and motor bike racing
- dangerous machinery
- clock or time trials, racing or similar competitive events
- long distance and endurance events
- water-based events
- treks or mountain climbing
- parachuting or flying.

***beyondblue* will not endorse activities that may adversely affect the health of participants (for example, smoking) or which involve the use of firearms, missiles, explosives or fireworks. The Community Fundraiser must ensure that all fundraising activities comply with relevant Australian laws and regulations.**

Important requirements for community fundraising activities

beyondblue supports the responsible serving of alcohol.

The Community Fundraiser must ensure *beyondblue* is not aligned with any pharmaceutical, gambling, alcohol or tobacco organisations.

Logos, media, information and approvals

The Community Fundraiser is responsible for generating publicity in the media about the fundraising activity. *beyondblue* reserves the right to approve any media release, artwork, activity description or wording about *beyondblue* before it is published or distributed.

This is to ensure that the activity and *beyondblue*'s involvement is represented correctly. If in doubt about how to describe *beyondblue* in any promotional material for your activity, please contact a member of the *beyondblue* Communications Team on (03) 9810 6100.

If the media contacts you for information about *beyondblue*, depression or related disorders, or information regarding treatments for mental illnesses, you must contact the *beyondblue* Communications Team on (03) 9810 6100. You are not authorised to speak on behalf of *beyondblue*. You may however speak about the fundraising activity itself.

Please also remember that it must be made clear to the public that all money being raised will be donated to the *beyondblue* Trust, and that you do not represent *beyondblue*.

Use of the *beyondblue* logo

Use of the *beyondblue* logo may be permitted at *beyondblue*'s discretion and for a limited time. Any placement of the *beyondblue* logo (by the Community Fundraiser or supporting commercial organisations) must be approved by *beyondblue*. Guidelines on how to use the *beyondblue* logo will be supplied upon request, following approval of the fundraising activity.

The *beyondblue* logo cannot be provided for placement on clothing, vehicles or other promotional merchandise.

Use of *beyondblue*'s name

All printed promotional materials featuring *beyondblue*'s name or logo must be approved at the design stage by *beyondblue* (prior to print and distribution).

Please note that *beyondblue* is printed as one word, lower case and in italics.

Example of correct usage:
beyondblue

Example of incorrect usage:
Beyond Blue

Once you receive the *Authority to Fundraise* letter from *beyondblue*, you may use the following terminology on all promotional materials: "Proudly supporting *beyondblue*".

Example of correct usage:
Golden Oldies Celebrity Dinner – Proudly supporting *beyondblue*

Example of incorrect usage:
Branding as a *beyondblue* event or activity.
E.g. *beyondblue* Golden Oldies Celebrity Dinner.

Make sure you contact *beyondblue* for approval of any media release, logo use, artwork, activity description or wording about *beyondblue* before it is published or distributed.

The *beyondblue* website

Once you receive the *Authority to Fundraise* letter, you can submit details of the fundraising activity to *beyondblue*'s website [events diary](#).

Please ensure that you provide as much information about your upcoming activity as possible.

Merchandise and information materials

beyondblue merchandise and information materials are freely available to the general public and can be ordered at www.beyondblue.org.au/resources or by calling the *beyondblue* info line on **1300 22 4636**.

beyondblue merchandise and information materials cannot be purchased and must not be resold. They must be made available to the public free of charge, in accordance with *beyondblue*'s awareness-raising strategy.

Looking for sponsorship – approaching companies for support

Please consult with *beyondblue* first before approaching the National or State office of any company which may be able to provide prizes, auction items or sponsorship for your fundraising activity.

Consulting with *beyondblue* is necessary because:

- the company may already support *beyondblue*
- it can appear unprofessional if a company is approached more than once
- approaching a National or State office could potentially impede existing negotiations for a major sponsorship or other partnership with *beyondblue*.

Money matters

As the Community Fundraiser and activity organiser, you are responsible for all financial aspects of the activity, including record keeping, management of funds and depositing of funds raised into the *beyondblue* Trust bank account.

You must comply with the charitable fundraising legislation and regulations that apply in your State or Territory.

Basic obligations

Your basic obligations are to ensure that:

- you keep, and provide *beyondblue* with, accurate financial records of your activity
- all funds raised are deposited into the *beyondblue* Trust bank account within 28 days of completion of fundraising activity.

beyondblue cannot pay or reimburse any expenses incurred by you as a result of the fundraising activity. However, you can deduct your expenses from the proceeds of the activity, provided this is properly documented. (As a guide we suggest you aim for a 60/40 ratio – that is, total expenses should not exceed 40 per cent of total proceeds.)

Tip for record keeping: A simple way to keep track of the financial details of your activity is to keep a folder with a number of plastic sleeves. Use individual sleeves to keep receipts, bank deposit stubs, cheques donated and donor sponsorship/tally sheets.

Issuing a *beyondblue* receipt

There are two types of official *beyondblue* receipts that can be issued.

a) A non tax deductible receipt

This is issued when a donor gets something in return for giving. In other words, a tax deduction isn't available (and only a non tax deductible receipt can be issued) if you, for example, win goods or services at a charity auction or you obtain entry to an event.

b) A tax deductible receipt

This is issued when a donor receives nothing in return (in other words, for a pure monetary donation).

Note:

- Tax deductible receipts can be issued only to people who donate \$2 or more.
- You cannot claim a personal tax deduction for monies received and/or donated on behalf of others.
- You cannot claim a tax deduction for gifts that are donated to your activity.
- If preferred, you can keep a register of all attendees/supporters eligible for a tax deductible receipt. Individual receipts can then be sent to you by *beyondblue* for distribution to attendees/supporters.

As the Community Fundraiser, you are responsible for issuing the correct receipt to donors. If in doubt, please refer to the Australian Tax Office website and click on **Tax deductible gifts**.

Please note: If you require individual receipts from *beyondblue* for donors, please attach a list of names, addresses and the amount donated and return this to *beyondblue* with the *Fundraising Evaluation* form.

Banking procedures

All funds raised from your activity money must be submitted to *beyondblue*, less your reasonable expenses. When your fundraising activity is completed, please fill out the *Fundraising Evaluation* form and return it to *beyondblue* with the funds raised within 28 days.

You can transfer the funds to *beyondblue* in the following ways:

a) By sending a cheque or money order payable to:

beyondblue Depression Research
Ancillary Fund Trust (ABN 41 688 712 705)
PO Box 6100 Hawthorn West VIC 3122

b) Via bank transfer using the details below:

Bank: National Australia Bank
Account: *beyondblue* Research Ancillary Fund Trust
BSB: 083-026
Account: 52-987-9262
Description: Activity ID
Remittance: donations@beyondblue.org.au
or fax to 03 9810 6111

Please ensure that you submit the *Fundraising Evaluation* form with the details of your cheque or EFT transfer and activity name and ID so that we can identify your donation.

beyondblue will receive your funds in confidence and will not solicit further donations or send information materials without your consent.

For more information about how to deposit funds, please email donations@beyondblue.org.au or contact the Fundraising Co-ordinator on (03) 9810 6100.

Being recognised as a legitimate *beyondblue* community fundraiser

Identification

Genuine *beyondblue* community fundraisers can be identified by an *Authority to Fundraise* letter which is printed on *beyondblue* official letterhead and includes:

- the fundraiser's name
- confirmation of the location or type of fundraising activity
- date for holding the activity
- *beyondblue* authorised staff signature.

beyondblue keeps a record of all letters sent to authorised fundraisers.

Please ensure you submit the *Fundraising Evaluation* form with the details of your cheque or EFT transfer and activity name and ID so we can identify your donation.

Legal matters

National, State and Territory laws

All fundraising activities must comply with all relevant National, State and Territory laws. **In each State and Territory, there is a Charitable Fundraising Act or equivalent to which *beyondblue*, and people fundraising on behalf of *beyondblue*, must adhere.** Other regulations you should be aware of, in particular, relate to liquor licensing and preparation of food.

It is also your duty, as the Community Fundraiser, not to make false statements while seeking donations. For example, if you say that 'proceeds' will be donated to *beyondblue*, then all monies must be donated. If you plan to deduct your expenses from money raised, then you should say that 'net proceeds' will be donated to *beyondblue*.

Your choice of fundraising activity may require compliance with additional State or Territory gaming legislation. Fundraising activities such as bingo, raffles, art unions and doorknock appeals are regulated by State and Territory gaming authorities. **(Please note *beyondblue* does not authorise doorknock appeals or raffles.)**

To find out more about fundraising legislation in your State or Territory, please contact the relevant authority listed below:

Australian Capital Territory

ACT Business Names, Incorporated Associations and Charitable Collections, Department of Justice & Community Safety
PO Box 255, Civic Square ACT 2608
T: (02) 6207 0473 F: (02) 6207 0487
Website: www.ors.act.gov.au

New South Wales

Office of Charities, Department of Gaming and Racing
GPO Box 7060, Sydney NSW 2001
T: (02) 9995 0666 F: (02) 9995 0611
Website: www.olgr.nsw.gov.au

Northern Territory

Racing, Gaming & Licensing Division of NT Treasury
PO Box 1154, Darwin NT 0801
T: (08) 8999 1800 F: (08) 8999 1888
Website: www.nt.gov.au/justice/licenreg

Queensland

Registration Services Fair Trading Operations
Department of Employment, Economic Development
and Innovation
GPO Box 3111, Brisbane QLD 4001
T: 13 13 04 F: 07 3405 0731 (General)
Website: www.fairtrading.qld.gov.au

South Australia

Office of the Liquor and Gambling Commissioner
Lottery Licensing,
GPO Box 771, Adelaide SA 5001
T: (08) 8226 8500 F: (08) 8226 8588
Website: www.olgc.sa.gov.au

Tasmania

The Office of Consumer Affairs and Fair Trading
GPO Box 1244, Hobart 7001
T: 1300 65 44 99 F: (03) 6233 4882
Website: www.consumer.tas.gov.au/business_affairs/charities

Victoria

Consumer Affairs Victoria
GPO Box 123 Melbourne 3001
Consumer Affairs Helpline: 1300 55 81 81 F: 8684 6199
Website: www.consumer.vic.gov.au

Western Australia

The Administrative Officer, Charitable Collections Advisory
Committee, Department of Commerce
Postal Address: Locked Bag 14 Cloisters Square WA 6850
T: 08 9282 0832 F: 08 9282 0948
Website: www.docep.wa.gov.au/charities

“Third Party” permits

Third party permits and permissions may also be required for your activity.

- Consider informing the police and St. John's Ambulance about your fundraising activity if it is a large event. This includes street parties and parties held at home. Your State or Territory police service may have guidelines for parties held at home.
- Please contact your local council to find out if your activity requires a local government permit.

For more information about fundraising on behalf of *beyondblue* visit our web page www.beyondblue.org.au/fundraising



Photo: VicHealth

Proposal to Fundraise form



Thank you for considering *beyondblue* for your community fundraising activity. We greatly appreciate your support.

To receive authority to fundraise on behalf of *beyondblue*, please complete this form. For your convenience, this form can be filled out online and emailed to bb@beyondblue.org.au. Alternatively, you can print this form and fax 03 9810 6111 or mail to PO Box 6100 Hawthorn West VIC 3122. If approved, you will be sent an *Authority to Fundraise* letter.

Please allow seven days for your application to be processed.

Title of the proposed activity (Activity Name):

Name of group/individual/company planning the activity (the Community Fundraiser) – please list each of the people responsible for the activity:

If a company, please state your ABN:

Mailing address:

State	Postcode

Tel (daytime):

Mobile:

Fax:

Email:

What type of fundraising activity are you proposing? (For example, a trivia night or casual dress day)

Please provide a brief outline of your proposed activity:

Why would you like to raise funds for *beyondblue*?

When do you intend to hold the activity? (Please provide a date for your activity.)

Where do you intend to hold the activity? (Please include venue address/es.)

State	Postcode

How do you intend to raise the funds?

How many people do you expect to attend?

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Will all the proceeds go to *beyondblue*?

Yes No

If no, please list the other organisations that will benefit (and percentage split):

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Does the activity require public liability insurance?

Yes No

Please forward a copy of the Certificate of Currency of your public liability insurance with this application.

Will the activity be held in more than one State or Territory?

Yes No

If yes, which States
or Territories?

VIC NSW ACT SA QLD TAS NT WA

Will you be seeking corporate sponsorship for the activity?

Yes No

If yes, please forward your proposed list of sponsors to *beyondblue*. Please do not approach your potential sponsors before you have received an *Authority to Fundraise* letter from *beyondblue*.

Please confirm the following:

I have read the *beyondblue* Fundraising Guidelines and agree to abide by them at all times. I confirm that by signing this Proposal to Fundraise, I am acting on behalf of and with the authority and power to bind those individuals and companies named as the Community Fundraiser. I confirm that my proposed fundraising activity complies with all relevant legislative and local government requirements and that all appropriate permits, licenses and insurance for fundraising in the State and/or Territory where the activity is to be held will or have been obtained. I will not exploit the position as a Community Fundraiser and/or the association with *beyondblue* for personal gain. I agree that all personal and sensitive information associated with the proposed fundraising activity will be handled in accordance with all relevant privacy legislation. I confirm that any fundraising activity costs shall at all times be held to a percentage of revenue which is generally acceptable within the not-for-profit sector and by the public. The traditional percentage split is no more than 60/40 – overall activity revenue to activity costs. I will ensure that financial and activity reports are made available to the public, including the amounts raised, how it was spent and the net proportion donated to *beyondblue*. I confirm that any monies raised or donated during the fundraising activity will be used for the stated purpose for which they were raised and within any specified timeframe. I agree to seek permission to use the *beyondblue* name or logo on materials relating to the fundraising activity. I agree not to align *beyondblue* with any pharmaceutical, gambling, alcohol or tobacco organisations in relation to the fundraising activity.

I confirm that I have read and understood the above requirements and I agree, on my own behalf, and on behalf of those named as Community Fundraisers, to comply with them

Signed for and on behalf of the Community Fundraiser:

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Date (dd|mm|yy):

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Disclaimer

Beyond Blue Ltd reserves the right to withdraw its approval for the fundraising activity at any time if it appears that there is a likelihood of the Community Fundraiser failing to adhere to any of the above terms and conditions or to the *beyondblue* Fundraising Guidelines.

For more information please call: 03 9810 6100

Please return this completed form to: *beyondblue* PO Box 6100, Hawthorn West VIC 3122, by fax 03 9810 6111 or email to bb@beyondblue.org.au

Fundraising Evaluation form



For your convenience, this form can be filled out online and emailed to bb@beyondblue.org.au. Alternatively, you can print this form and fax 03 9810 6111 or mail to PO Box 6100 Hawthorn West VIC 3122.

Activity ID number:

Today's date (dd|mm|yy):

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Name of Community Fundraiser

Mailing address:

State	Postcode

Tel (daytime):

Email:

Activity name:

Activity date (dd|mm|yy):

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Description of fundraising activity:

Amount of funds raised:

Cheque enclosed:

EFT Transfer *(please include printout of EFT receipt):*

Do you require a receipt for each donor? If yes, please complete the Donor Receipt form on page 13.

Yes No

Would you like to receive more information from *beyondblue* in the future? (e.g. newsletter)

Yes No

How to donate funds raised at an activity



Thank you for your support of *beyondblue*.

Once your fundraising activity is completed, please fill out the *Fundraising Evaluation form* (overleaf) and return it with the funds raised within 28 days of the completion of the activity.

Donations will be deposited into the *beyondblue* Depression Research Ancillary Fund Trust (ABN 41 688 712 705), which is endorsed by the Australian Taxation Office with Deductible Gift Recipient Status.

All donations are used for initiating and supporting depression related research and may be tax deductible. A receipt will be provided for all donations over \$2.00.

You can transfer the funds to *beyondblue* in the following ways:

a. By sending a cheque or money order payable to:

beyondblue Depression Research
Ancillary Fund Trust (ABN 41 688 712 705)
PO Box 6100, Hawthorn West, VIC 3122

b. Via bank transfer using the below details:

Bank: National Australia Bank
Account: *beyondblue* Research Ancillary Fund Trust
BSB: 083-026
Account: 52-987-9262
Description: Activity ID
Remittance: donations@beyondblue.org.au
or fax to **03 9810 6111**

Please ensure that you submit the *Fundraising Evaluation form* with the details of your online donation, cheque or EFT transfer so that we can identify your donation.

beyondblue will receive your donation in confidence and will not solicit further donations nor send information materials without your consent.

For more information about how to make a donation, email donations@beyondblue.org.au or contact the Fundraising Co-ordinator on **(03) 9810 6100**.

