



Healesville Community Renewable Energy Inc

Finance08 - Fundraising Policy

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Policy Type	Finance	Subject	Fundraising
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1 Introduction

Healesville CoRE may charge fees for membership of the organisation. A membership fee supports the ongoing operational costs of Healesville CoRE.

At times, Healesville CoRE may require additional financing for administration or initiative delivery. A fundraising activity supports the ongoing costs of Healesville CoRE.

Healesville CoRE is committed to ensuring that fundraising activities are carried out in an ethical manner.

Fundraising can be done by an organisation that is registered with the ACNC as a charity organisation. As of February 2021, Healesville Community Renewable Energy Inc is not an ACNC-registered charity.

An ACNC-registered charity in Victoria does not need to apply for a fundraising licence for fundraising in Victoria. If any fundraising will be from NSW, Queensland, Tasmania or WA then Healesville CoRE may be required to apply for a fundraising licence, depending on factors such as total fundraising amount, or length of fundraising time. This should be considered if there is expectation of fundraising through online financial transactions.

The major benefits of fundraising are:

- To increase the revenue stream
- To fund specific projects or purchases,
- To gain support by creating strong links with the community

2 Purpose

The purpose of this Policy is to provide guidelines and prompts for Healesville CoRE in the application and administration of fundraising activities.

3 Policy

3.1 Fundraising

1. Fundraising activity includes all activities undertaken by or on behalf of Healesville CoRE with the aim of receiving funds.
2. The Central Committee must ensure that all Healesville associated people who are involved in any fundraising activity are made aware of the existence and contents of this Policy.
3. Fundraising activities are authorised and monitored by the Central Committee. Every fundraising activity must have a nominated responsible person who will manage the scope, timing, people, communications, risks, resources, cost and quality of the fundraising initiative.
4. The Fundraiser Manager must plan the Fundraising activity and present timings, benefits and costs to the Central Committee for consideration and approval.
5. Healesville CoRE should ensure that in cases where the fundraising is specific (e.g. support for a specified initiative) the wording of campaign information enables the transfer of excess funds to another project or general use.
6. Fundraising activities should not be undertaken if they may be detrimental to the good name or community standing of Healesville CoRE.

7. Financial contributions will only be accepted from companies, organisations and individuals that the Central Committee considers ethical.
8. Any communications to the public made in the course of carrying out a fundraising activity shall be truthful, accurate and non-deceptive.
9. Use of photographs which are misleading that could create a false impression or misunderstanding are not permitted.
10. Healesville CoRE will not exaggerate facts relating to the potential beneficiary.
11. Fundraising activities that Healesville CoRE may undertake are:
 - Direct appeals by mail, telephone, website
 - Lotteries, competitions and games of chance such as raffles
 - Major events such as a ball, annual fundraising day
 - Market days
 - Activities such as selling chocolates, sausage sizzles
 - Supply of food, entertainment or other goods and services
 - Asking for support or services

3.2 Rules

12. All fundraising detail must include Healesville CoRE identity where necessary, including ABN).
13. All personal information collected by Healesville CoRE is confidential and is not for sale or to be given away or disclosed to any third party without consent.
14. Nobody directly or indirectly employed by or volunteering for Healesville CoRE shall accept commissions, bonuses or payments for fundraising activities on behalf of the organisation.
15. Taxation and legal aspects must be considered when any appeal, donation, gift, or bequest is proposed. Advice is to be sought from appropriate sources as early as possible to ensure the process is properly coordinated.
16. All fundraising by means of lotteries, e.g. raffles, etc. must comply with the required licensing arrangements.
17. Healesville CoRE will not involve children under the age of 18 in fundraising activities and will abide by any age relevant limits imposed by legislation.
18. Any fundraising must comply with the relevant State or Territory legislation and comply with the Competition and Consumer Act 2010 and the Australian Consumer Law and Fair Trading Act.

3.3 Healesville CoRE Guidelines

19. Healesville CoRE members are discouraged from receiving personal gifts from potential sponsors or donors at all times, and must avoid any real or perceived conflicts of interest.
20. Healesville CoRE will not accept any donation which restricts use based upon age, race, colour, sexuality or gender
21. Healesville CoRE will adopt good practice principles during face-to-face activity to avoid causing public nuisance or disturbance, including:
 - Avoid behaviour which may harm the reputation of the fundraising profession.
 - Terminate a conversation when a person does not wish to be engaged.
 - Avoid deliberate obstruction or pursuing the public excessively (Walk no more than 3 steps with a member of the public).
 - Maintain distance from shop entrances, cash points and other street features.
 - Avoid members of the public who are seated or 'on duty'.
 - Have clearly visible identification badge.
22. Healesville CoRE will adhere to the good practice for cash handling, including:
 - Cash must be counted and recorded by two unrelated individuals, wherever possible.
 - Unsecured cash must never be left unattended or in an unattended environment.
 - Cash must be counted in a secure environment in the presence of two individuals.
 - Cash must be banked as soon as is practicable.
 - Cash not banked immediately must be placed in a safe or other secure location and Healesville CoRE Treasurer must be notified.
 - At the earliest possible date, reconciliation must be made between cash banked and income summaries. Where practical, this must be undertaken by a person independent of the counting and cashing up of the money.

23. Any Healesville CoRE member accepting cash must provide the donor with a receipt if they request this. A receipt copy should be given to Healesville CoRE Treasurer.
24. Healesville CoRE will not sell or exchange personal details of donors.
25. Healesville CoRE accepts donations only under the premise that no material benefit or advantage will be provided to the donor.
26. Donors' requests to remain anonymous will be respected as far as is legally, practically, and ethically possible.
27. Donors or prospective donors who request no further contact will not be contacted for fundraising purposes.
28. Donors have the right to ask that their donations be allocated to a specific activity of Healesville CoRE and Healesville CoRE will meet these requests wherever possible.
29. Donors should be informed of the manner in which the donation is to be used and the capacity of Healesville CoRE to effectively use the donation.
30. No general solicitations shall be undertaken by telephone or door-to-door.
31. Paid fundraisers will not be engaged.
32. Healesville CoRE will not engage in house-to-house collections, street fundraising or telephone fundraising.

3.4 Administration

33. All monies raised via fundraising activities will be for the stated purpose of the appeal and will comply with the organisation's stated mission and purpose.
34. Each donation will be acknowledged by Healesville CoRE.
35. Healesville CoRE will ensure that all outdoor fundraising events are delivered in a manner which ensures minimal impact on the natural environment.
36. Healesville CoRE must recognise donors and appropriately acknowledge the donation.
37. Healesville CoRE will maintain a secure fundraising database that will record sufficient information in order to manage the donation with regards to the donor's intent. Each record may contain:
 - The name and contact details of the donor or their legal representative;
 - The type of donation (cash, in-kind, bequest, etc.);
 - A description of the donation (cheque, money order, pledge, in-kind services);
 - The value of the donation, including pledge period, if appropriate;
 - The conditions of the donation (if applicable);
 - The purpose to which the donation is to be used (e.g. Community Solar Farm, Revolving Community Fund, Local Retailer Startup);
 - The receipt details (including receipt number and date);
 - The recognition provided to the donor by Healesville CoRE;
 - The history of contact with Healesville CoRE and
 - Who was responsible for soliciting the donation and who is responsible for nurturing the donor relationship.
38. In the case of donations made in-kind the amount of the donation recorded will be that amount stipulated through independent valuation.

3.5 Standards

39. Healesville CoRE will not accept donations from donors whose activities appear to be in direct conflict with our Values, Vision and Mission.
40. Healesville CoRE will not accept gifts associated with unsuitable products, corporates and individuals, e.g. arms dealings, tobacco, gambling businesses, etc.
41. Healesville CoRE will not undertake business with companies or individuals who participate in activities which could cause detriment to our organisation's reputation.
42. Healesville CoRE will not denigrate other individuals or organisations.
43. Healesville CoRE will not take advantage of mistakes made by the sponsor.
44. Sponsors may be allowed to make pledge commitments to be paid over a specific period of time

4 Related Documents

Finance03 - Budget Planning

Governance09 Conflict of Interest Policy

Governance07 - Transparency & Accountability Policy

Value01 - Vision & Mission Statement

5 External References

Funding Centre - an enterprise of ourommunity.com.au: <https://www.fundingcentre.com.au/tool/fundraising-policy>

Fundraising Policy Templates (includes Fundraising Budget, Strategy, Proposal, Action Plan, Calendar, Raffle Flyer, Invitation Templates; Fundraising Communication Plan):
<https://www.template.net/business/policy/fundraising-policy/>

Fundraising licence requirements for registered charities:
[https://www.nfplaw.org.au/sites/default/files/media/Fundraising licence requirements for charities Cth.pdf](https://www.nfplaw.org.au/sites/default/files/media/Fundraising%20licence%20requirements%20for%20charities%20Cth.pdf)

Competition and Consumer Act 2010: <https://www.legislation.gov.au/Details/C2021C00010>

Australian Consumer Law and Fair-Trading Act 2021 (Vic): <https://www.legislation.vic.gov.au/in-force/acts/australian-consumer-law-and-fair-trading-act-2012/028>