



Fundraising Guidelines
Essential Information for Community Fundraisers



Thank you...

Thank you for considering raising funds to support COPE: Centre of Perinatal Excellence.

The team at COPE greatly appreciates support from the community and the generosity of individuals and organisations who conduct and support activities held to benefit our work.

To ensure that your activity is safe, rewarding and fun, COPE provides the following step-by-step guide.

About COPE

COPE is an independent, not for profit organisation dedicated to helping support the emotional health and wellbeing of mothers, fathers and infants. Our goal is to reduce the devastating impacts of mental health conditions, such as depression and anxiety, which can be experienced during pregnancy and in the first year following birth. COPE works directly with health professionals to increase their knowledge, skills and confidence in diagnosing and treating mental health issues, so that parents receive effective support and treatment.

At the same time, we want to mobilize a groundswell of community support to challenge current expectations surrounding parenthood and address the high levels of stigma that we know discourage women from disclosing, seeking support and treatment for pre and postnatal anxiety and depression.

WHAT WE STAND FOR

COPE stands for Centre of Perinatal Excellence.

We are dedicated to reducing distress and restoring lives of mothers, fathers and families affected by perinatal (ante and postnatal) emotional and mental health conditions. COPE focuses on ante and postnatal depression and anxiety, bipolar disorder, and postpartum (puerperal) psychosis specifically.

COPE's goals

With your support we work to:

1. **Raise awareness and understanding** - so that mental health conditions are identified early.
2. **Stop the stigma** - so people feel ok to speak up and seek help.
3. **Empower people** - by providing access to high quality information and guidance to care.
4. **Equip health professionals with knowledge, skills and confidence** - so that they can provide safe and effective care.
5. **Support world-leading research** - to enhance practise, inform policy and services.
6. **Provide a voice (advocate)** - to represent the needs of women and their families.

Fundraising for COPE

To ensure your activity is safe, rewarding and fun, COPE provides the following step-by step guide.

It will help you to develop an activity that minimises risks to you, other participants and to COPE, and provide guidance in relation to important State and Territory legislation and local government regulations.

By law, COPE is required to approve and authorize all community-based fundraising activities involving members of the public and volunteers where the funds raised will be donated to COPE. 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
- whether the proposed activity meets the standards and requirements of COPE
- whether the proposed activity is compliant with State or Territory law
- whether the proposed activity meets the requirements of your local fundraising authorities or your local council.

To get started, please follow the six-steps to community fundraising.

COPE's six steps to fundraising

STEP 1 - WHAT WOULD YOU LIKE TO DO?

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

Examples of activities we suggest include:

- morning or afternoon tea at work or at mothers groups
- girls luncheon or night in/out
- auction
- open garden
- casual dress day
- wear pink day
- concert or music festival

- trivia night.

You can also encourage your workplace to support COPE through initiatives such as workplace giving.

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

- tin rattling
- door-to-door fundraising
- alignment with any pharmaceutical or tobacco organisations.

Please note that COPE will not endorse activities that may adversely affect the health of participants.

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 COPE?

Once you've decided on your activity, you will need to complete and sign the Proposal to Fundraise form on page 8 and send it to COPE for consideration.

COPE will usually provide a response within one week from the date of receipt. COPE reserves the right to decline any fundraising proposal.

STEP 4 - WHAT WILL COPE DO?

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

An Authority to Fundraise letter will only be provided once COPE is satisfied that the proposed activity meets these Fundraising Guidelines.

STEP 5 - COPE HAS AUTHORISED MY ACTIVITY - WHAT NOW?

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

Keep in mind that COPE would welcome any photographs or post-event information that may be suitable for inclusion on its website, facebook page or in publications (e.g. annual report) so allocate responsibilities such as photography or writing where possible.

Looking for sponsorship and approaching companies for support

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

STEP 6 - THE ACTIVITY IS OVER - WHAT NOW?

Please fill out the Fundraising Evaluation form on page 10 and deposit the funds raised to COPE within 28 days of completion of your fundraising activity (see page 8 for further details).

As a small organisation, it is not always possible for COPE to provide representatives to attend fundraising activities or collect funds raised - but we will do our best!

Understanding your responsibilities

The fundraising activity must be conducted in the name of the person (aged over 18 years of age) or organisation named in the Authority to Fundraise letter (the Community Fundraiser). The Community Fundraiser, not COPE, 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 COPE, nor claim to have authority to act on behalf of COPE.

Public Liability Insurance

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

Public liability insurance protects you from costs that might arise if an incident occurs during the activity, even if you are not to blame.

Risky Activities

COPE 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.

Important requirements for community fundraising activities

COPE supports the responsible serving of alcohol.

The Community Fundraiser must ensure COPE is not aligned with any pharmaceutical or tobacco organisations.

Logos, media information and approvals

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

This is to ensure that the activity and COPE's involvement is represented correctly. If in doubt about how to describe COPE in any promotional material for your activity, please address your question/enquiry to info@cope.org.au for assistance.

If the media contacts you for information about COPE you should contact the Executive Director on 0438 810 235. You are not authorised to speak on behalf of COPE. You may however speak about the fundraising activity itself.

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

Use of the COPE logo

Use of the COPE logo may be permitted at COPE's discretion and for a limited time. Any use of the COPE logo (by the Community Fundraiser or supporting commercial organisations) must be approved by COPE.

Guidelines on how to use the COPE logo will be supplied upon approval of the fundraising activity if use of the logo has been permitted.

Use of COPE's name

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

Please note that COPE is printed in capital letters and may be referred to as

- COPE and/or
- Centre of Perinatal Excellence (COPE)

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

Example of correct usage:

Girls Mother's day luncheon – Proudly supporting COPE.

Example of incorrect usage:

Branding as a COPE event or activity.

E.g. COPE Mothers day luncheon.

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

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 COPE's 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 COPE with, accurate financial records of your activity
- all funds raised are deposited into COPE's bank account within 28 days of completion of fundraising activity.

COPE 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 that total expenses should not exceed 30 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 COPE receipt

There are two types of official COPE receipts:

a) *A non tax deductible receipt that can be issued*

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.

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

BANKING PROCEDURES

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

You can transfer the funds to COPE via bank transfer using the details below:

Bank: Commonwealth Bank of Australia (CBA)

Account: Centre of Perinatal Excellence - Donations

BSB: 06 - 3138

Account: 10748085

Description: Event ID

Remittance: info@cope.org.au

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.

COPE 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 info@cope.org.au.

Donations can also be made direct to COPE through the Givenow Page



www.givenow.com.au/COPE

Legal matters

BEING RECOGNISED AS A LEGITIMATE COPE COMMUNITY FUNDRAISER

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

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

COPE keeps a record of all letters sent to authorized fundraisers.

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

NATIONAL, STATE AND TERRITORY LAWS

All fundraising activities must comply with all relevant National, State and Territory laws and regulations. **In each State and Territory, there is a Charitable Fundraising Act or equivalent to which COPE, and those fundraising on behalf of COPE, must adhere to.** 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 COPE, 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 COPE.

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

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

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 & 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_](http://www.consumer.tas.gov.au/business_affairs/charities)
[affairs/charities](http://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: (03) 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 relating to parties held at home. Please contact your local council to find out if your activity requires a local government permit.



Proposal to Fundraise Form

Thank you for considering COPE for your community fundraising activity.

We greatly appreciate your support.

To receive authority to fundraise on behalf of COPE, please complete this form. For your convenience, this form can be filled out online and emailed to info@cope.org.au. If approved, you will be sent an Authority to Fundraise letter.

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: (day)

Mobile:

What type of fundraising activity are you proposing?

(For example, luncheon, trivia night)

Please provide a brief outline of your proposed activity:

Why would you like to raise funds for COPE?

When do you intend to hold the activity: / /

Where do you intend to hold the activity: (venue/address)

How do you intend to raise the funds?

How many people do you expect to attend?

Will all the proceeds go to COPE? Yes No

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

Does the event 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?

Will you be seeking corporate sponsorship for the activity? Yes No

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

PLEASE CONFIRM THE FOLLOWING:

I have read the COPE 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 COPE 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 70/30 – 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 COPE. 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 COPE name or logo on materials relating to the fundraising activity. I agree not to align COPE with any pharmaceutical or tobacco organisations in relation to the fundraising activity. I give consent for photographs or other information I provide from the event to be published online or in publications by COPE.

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.

DISCLAIMER

COPE 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 COPE Fundraising Guidelines. For more information please email info@cope.org.au

Fundraising Evaluation Form

For your convenience, this form can be filled out online and emailed to info@cope.org.au.



Event ID number:

Today's date: / /

Name of community fundraiser:

Mailing address:

State:

Postcode:

Tel: (day)

Mobile:

Email:

Activity name:

Activity date: / /

Description of fundraising activity:

Total amount of funds raised:

Expenses incurred:

Net amount of funds raised for COPE:

\$

\$

\$

EFT Transfer: (please include EFT of receipt)

Cheque enclosed:

Do you require a receipt for each donor enclosed?

Yes

No

Would you like to receive information from COPE in future?

Yes

No

How to donate funds raised at an activity

Thank you for your support of COPE: Centre of Perinatal Excellence.

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 COPE bank account (ABN 50 203 962 931), which is endorsed by the Australian Taxation Office with Deductible Gift Recipient Status.

All donations are used to support COPE's programs, research and campaigns and may be tax deductible.

A receipt can be provided for all donations over \$2.00.

You can transfer the funds to COPE in the following ways:

- By sending a cheque or money order payable to:
Centre of Perinatal Excellence (ABN 50 203 962 931)
PO Box 122 Flemington, 3031..
- Via bank transfer using the below details:
Bank: Commonwealth Bank of Australia (CBA)
Account: Centre of Perinatal Excellence
BSB: 06-3138
Account: 10748085
Description: Event ID
Remittance: info@cope.org.au

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.

COPE 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 info@cope.org.au.

Find out more about how you or your organisation can become involved, connect with us and be part of making a difference.



www.cope.org.au



facebook.com/COPEorg



[COPEorg](https://twitter.com/COPEorg)



www.givenow.com.au/COPE



info@cope.org.au

ABN: 50 203 962 931

ACN: 165 215 449



Centre of
Perinatal Excellence