



UNIVERSITY *of*
TASMANIA

MENZIES 
Institute for Medical Research

COMMUNITY FUNDRAISING GUIDELINES

MAY 2016

THANK YOU FROM MENZIES

I would like to thank you for considering raising funds for the Menzies Institute for Medical Research. We are grateful to the many individuals, community groups and organisations that support us.

Menzies researchers work tirelessly performing internationally significant medical research leading to healthier, longer and better lives for Tasmanians. Medical research takes significant time and resources. Without donations, some research simply would not happen. Our researchers strive to obtain competitive grants however, we know these grants will never fully cover the costs of research. This is why your support and the fundraising efforts of the community are fundamental to our success.

This guide outlines the requirements under State law when you choose Menzies as the beneficiary for your upcoming fundraising activity. Please do not hesitate to contact us with any questions you have.

We hope this guide helps you make your event a great success.

I thank you again for your support and commitment to Menzies, it is greatly appreciated.

Kind Regards,



Magdalena Lane
Institute Advancement Manager

GUIDELINES

1. These Guidelines set out the basis on which a Fundraising Activity may be held by you on behalf of Menzies for Menzies.
2. If you wish to proceed with your Fundraising Activity after you have read these Guidelines, you should fill out the Fundraising Registration Form (the Registration Form) attached to these Guidelines or available on Menzies website, www.menzies.utas.edu.au, and send it to Menzies via post or email:

Manager, Menzies Institute for Medical Research
Private Bag 23
Hobart TAS 7001 Australia
E: menzies.advancement@utas.edu.au

3. In signing and returning the Registration Form you are accepting the terms and conditions in these Guidelines, and the Guidelines will form the basis of any dealings between you and Menzies in relation to the Fundraising Activity should you proceed to hold it on behalf of Menzies.
4. For fundraising within Tasmania you do not require a separate 'authority to fundraise' before you proceed with a fundraising Activity on behalf of a charity. Where Menzies approves your Fundraising Activity, it will forward you an authority to fundraise for Menzies on behalf of Menzies.
5. In taking into account whether it will provide you with an authority to fundraise, Menzies will consider:
 - a) whether Menzies is satisfied that your Fundraising Activity will be likely to produce a reasonable return (as a guide, total expenses of the Activity should be less than 30% of the total proceeds);
 - b) whether the Fundraising Activity accords with Menzies's objects and purposes;
 - c) the risks attached to the Fundraising Activity, and where it involves physical activities (such as physical endurance or sporting Activities) you will be asked to provide Menzies with more details in the Registration Form including as to:
 - (i) the physical activity involved (including details as to the nature of the potential participants);
 - (ii) the timing and duration of the Activity;
 - (iii) any details of sponsorship arrangements which you have organised or proposed to organise in relation to the Activity;
 - (iv) insurance which you will take out in respect of the Activity;
 - (v) levels of support to be provided to the Activity;

- (vi) a risk mitigation strategy which you have developed in respect of the Activity;
 - (vii) your prior experience in coordinating such Activities.
6. Where you have received an authority to fundraise from Menzies, you may or may not decide to proceed with the Fundraising Activity. Where you do proceed with the Fundraising Activity, however, you will be deemed to do so on the terms outlined in these Guidelines.

YOUR OBLIGATIONS IN RELATION TO FUNDRAISING

Running the Fundraising Activity

- 7. You will conduct the Fundraising Activity in your name and you will be solely responsible in relation to all matters in connection with or arising from the Fundraising Activity.
- 8. Menzies is unable to take a coordinating role in the Fundraising Activity and its staff are unable to assist in soliciting prizes, organising publicity, marketing or providing goods or services for the Fundraising Activity.
- 9. You will provide Menzies with reasonable information in relation to the Fundraising Activity and associated arrangements (such as marketing) on an ongoing basis.
- 10. Your arrangements for the Fundraising Activity should be planned in consultation and with the approval of Menzies. In particular, where the Fundraising Activity will materially differ from the Activity as described in the Registration Form, you will promptly notify Menzies of the relevant change and will seek further approval from Menzies to continue to hold the Fundraising Activity in that way.

Compliance with laws

- 11. You will abide by all applicable legislation and other laws relating to the Fundraising Activity (including the *Collections for Charities Act 2001*) and will apply for any necessary permits or approvals relating to the Fundraising Activity and any activities associated with it.
- 12. The *Collections for Charities Act 2001* imposes a number of obligations on persons or organisations soliciting donations. If you are unaware of the provisions of the Act, Menzies can provide you with a copy of it on request, but you remain solely responsible for complying with that Act and Menzies accepts no responsibility for your failure to do so.
- 13. The *Collections for Charities Act 2001* does not apply to raffles and similar fundraising activities. If your Fundraising Activity involves such activities, you should contact the Liquor and Gaming Branch, Tasmanian Gaming Commission on (03) 6233 2475 with any enquiries.

Finance and record keeping

14. It is in the public interest that funds which are raised through fundraising activities are properly accounted for. You will be solely responsible for the management of the financial aspects of the Fundraising Activity and related activities and accounting for all funds raised. In undertaking that role you agree to:
 - a) provide as accurate an estimate of the likely expenses and proceeds of the Fundraising Activity as possible in the Registration Form;
 - b) set up and maintain proper financial records and accounts which can be audited if necessary;
 - c) where the Fundraising Activity is likely to be a significant or ongoing Activity, establish a separate bank account that mentions Menzies into which all funds raised through the Activity are deposited. This account should be closed as soon as the Fundraising Activity is over.
15. Menzies cannot pay you for any expenses you incur in relation to the Fundraising Activity but your necessary expenses may be deducted by you from the funds which are raised through the Fundraising Activity provided that you:
 - a) are mindful of the provisions of section 13 of the *Collections for Charities Act 2001* (which prohibits excessive benefits); and
 - b) properly document those expenses.
16. Details of the expenditure and income in relation to the Fundraising Activity must be forwarded to Menzies within 4 weeks of the Fundraising Activity.
17. Menzies can issue tax deductible receipts for supporters who donate \$2.00 or more. If you require Menzies to issue such receipts you must note this on the Registration Form. In order for Menzies to be able to issue such receipts, you must keep a register of the names, addresses and donation details of supporters who are eligible and provide this to Menzies. Menzies will then return all receipts to you for distribution to the supporters. Please note that Menzies cannot issue receipts in respect of:
 - a) ticket purchases;
 - b) entry into an Activity;
 - c) donations of goods or services; or
 - d) auction purchases.
18. Menzies is unable to process credit card transactions on your behalf and if you require this facility you must organise it with your financial institution.

Promoting the Fundraising Activity and using the Logo of Menzies

19. It is important that you keep in mind that the Fundraising Activity is not a University Activity or a Menzies Activity, but rather an Activity run by you to raise funds to donate to Menzies.

20. Accordingly, when raising funds through the Fundraising Activity, you should make it clear that you are not raising funds “in the name of” Menzies, but rather you are raising funds in your name on behalf of Menzies. Suggested wording to be used could include “*proudly supporting the Menzies Institute for Medical Research*” or “*All funds raised support the Menzies Institute for Medical Research*”.
21. If you wish to use Menzies name or logo, Menzies’s prior approval to do so must be obtained. All material, pamphlets, brochures or products on which you wish to place the logo must be submitted to Menzies for approval prior to production and release.
22. All media releases in relation to the Fundraising Activity must be approved in advance by Menzies prior to them being published or circulated. Menzies will promptly respond to all requests for approval of such material.

Responsibility for claims in relation to the Fundraising Activity

23. You will at no time represent yourself (nor will you allow your staff or other volunteers of yours to represent themselves) as a representative of Menzies or Menzies.
24. You will:
 - a) release Menzies and the University of Tasmania in connection with all claims, demands or legal proceedings of any kind in any way associated with the Fundraising Activity; and
 - b) indemnify Menzies and the University of Tasmania from all liability or costs that may arise in respect of any loss or damage to property or the injury to or death of any person in any way associated with the Fundraising Activity or your act, omission or negligence.
25. You acknowledge that neither Menzies nor the University of Tasmania nor insurance policies will cover the Fundraising Activity or incidents in connection with the Fundraising Activity and the Fundraising Activity will be held entirely at your risk.
26. Menzies reserves the right to withdraw its approval of and disassociate itself from the Fundraising Activity if it appears that there is a likelihood that you do not intend to adhere by these Guidelines. If Menzies does so, you will be required to take all steps to disassociate the Activity from Menzies.

Mutual Obligations

27. Both parties will:
 - a) Devote time and attention to the alliance as is necessary to give effect to the agreement and the relevant plan;
 - b) Inform the other party of all matters relating to the alliance or the objectives of the alliance;

- c) Punctually pay personal liabilities and indemnify the other party against them;
- d) Not act in any manner which may be prejudicial to this alliance.

28. No rights to exclusivity are assigned under the terms of this Fundraising Activity.

- a) The parties will share the materials and associated materials for use in all promotional materials under the terms of this alliance;
- b) No materials or associated materials can be utilised by either party once alliance is terminated;
- c) The parties must not disclose confidential information subject to standard exceptions;
- d) A party may not assign its rights arising under the agreement without the consent of the other party;
- e) No joint venture, agency of partnership between the parties. Neither party has the authority to bind the other.

BANKING ARRANGEMENTS

Proceeds of your Fundraising Activity may be delivered to the Menzies Institute for Medical Research by either:

- 1) Depositing funds in person or by EFT – we ask that you include ‘Menzies Donation – Your Activity Name’ as the reference and email confirmation of the deposit including the reference number to menzies.advancement@utas.edu.au:

Commonwealth Bank
University of Tasmania No 1 Account
BSB 067 102
Account: 0005 0350

- 2) Sending a cheque made payable to the ‘Menzies Institute for Medical Research’ at the address below;
- 3) Making the donation online from your credit card at www.menzies.utas.edu.au

If you have any questions in relation to these Guidelines, please contact:

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Menzies Institute for Medical Research
Private Bag 23
Hobart TAS 7001 Australia
P: +61 3 6226 4236
E: samantha.jackson@utas.edu.au
www.menzies.utas.edu.au

Your support for the Menzies Institute for Medical Research is greatly appreciated.