

FUNDRAISING APPLICATION FORM

Thank you for your interest in raising funds for Monash Health - we really appreciate your support.

The Monash Health Foundation works to secure funds for research, education, capital works, new technology and innovative projects, supporting Monash Health's vision for better health in our community.

Community support is essential and we are grateful for the wonderful generosity of those around us. The Monash Health Foundation encourages fundraising activities undertaken by other organisations, individuals or community groups and we look forward to working with you.

The Foundation team is here to assist you with all aspects of your fundraising initiative, providing support and guidance to help you make the most of the opportunities.

This tool kit has been provided to assist external individuals or third parties who are wanting to raise funds for Monash Health or one of subsidiaries. It contains guidelines and the necessary application forms to help with the process.

More than 15,000 staff work across 40 sites across south eastern metropolitan Melbourne, including the major hospital facilities of Monash Medical Centre Clayton, Monash Children's Hospital, Moorabbin Hospital, Dandenong Hospital, Casey Hospital, the Kingston Centre and Cranbourne Integrated Community Care Centre, in addition to community health facilities throughout the region.

No fundraising activities can commence on behalf of Monash Health without written approval from the Monash Health Foundation.

This Toolkit Includes:

- Fundraising Helpful Hints
- Fundraising Guidelines Sheet
- Fundraising Application Form
- Fundraising Report Template

***Please note not all fields and forms will be applicable. Please indicate by N/A (not applicable)**

FUNDRAISING HELPFUL HINTS

Complete and submit *Activity / Event Application Form*.

Once you have decided that you want to help Monash Health by holding a fundraising activity or event, we ask that you complete the attached *Activity / Event Application Form* and submit to the Monash Health Foundation for approval.

No fundraising activity can commence on behalf of Monash Health without written approval from the Monash Health Foundation.

Let us help you

We want your event to be a success, so following approval of your fundraising event, the Monash Health Foundation team will be only too happy to meet with you to further plan your event. The Monash Health Foundation will be able to assist by offering advice, promoting the event internally and assisting with promoting the event externally*.

**Please note that Public Affairs and Communications must be involved with any media and publicity.*

Get the right people to help you

Planning a successful event can be time consuming. Try not to do everything on your own. Share the work load and recruit enthusiastic and dedicated volunteers. Surround yourself with the right people.

Determine your target audience

A good understanding of your target audience is crucial to the success of your fundraising event. This may determine factors such as the location of your fundraiser, the time that is to be held, the type of product that you will be selling etc. Think about your target audience and decide upon the things that appeal to them.

Set a timeframe

Set yourself a planning timetable leading up to the event. Give yourself plenty of time to prepare for the fundraiser and allow for unforeseen circumstances that may delay your preparation. Also ensure that your event is held at a time convenient to those that will be attending.

Determine the logistics

Attention to detail is critical. Ensure you have 'all bases covered' and review the logistics of your event. The Monash Health Foundation team is happy to review the logistics of your event at the initial planning meeting.

Promote the event

Promotional and marketing material will bring your fundraising event to the attention of your target audience. **All marketing material will need to be approved by Public Affairs and**

Communications prior to distribution.

Collection of funds

Once all funds have been collected, we ask that it is then forwarded to the Monash Health Foundation within 30 days of your event. A receipt will be issued when funds are received.

Thank your donors and volunteers

After your event, it is important to thank your donors and volunteers for their support throughout your fundraising project. The Monash Health Foundation can help you send out letters of thanks and recognition to your major donors and supporters.

FUNDRAISING GUIDELINES

Event Approval

Before an event can proceed, event approval must be granted by the Monash Health Foundation. Only events consistent with the image and values of Monash Health will be approved.

An event or activity organised by a third party is not an official Monash Health Foundation or Monash Health event or activity.

Fundraising Activities that are NOT endorsed by Monash Health

- Tin rattling
- Door-to-door fundraising
- Cause-related marketing or percentage of proceeds e.g. percent of profits from the sale of a product
- Alignment with any gambling or tobacco products

Monash Health has a NO Telemarketing Policy. Monash Health values consumer privacy and consequently will not enter into relationships with organisations using telemarketing sales techniques.

Monash Health Liability

Whilst the Monash Health Foundation does offer advice and support in event planning, Monash Health will not be recognised as the organiser of third party activities or events. As a consequence, all issues involving financial and public liability / safety are the total responsibility of the fundraising organiser. Monash Health will not be liable for any expenses occurred in running or promoting the event.

Monash Health Database

Under no circumstances will access be granted to the Monash Health Foundation donor database or the Monash Health patient database.

Monash Health Corporate Identity

Brand and logo use - Fundraisers wishing to use the Monash Health / Monash Health Foundation name or logo on any promotional materials must seek prior approval and provide Public Affairs and Communications with a final draft before printing.

Marketing Material - All promotional material must be approved by the Monash Health Foundation or the Public Affairs and Communications department.

Media and Promotion - Public Affairs and Communications encourages the promotion of events and may be able to assist in providing promotional materials on request. Any group wishing to contact media (including print, TV and radio) must seek approval from the Senior Manager of Media at Monash Health before sending out materials.

Financial Details

Prior to event please fill in the attached application form detailing expenditure and return to the Monash Health Foundations for approval. Don't worry if you have to change the budget as you go, as the budget you submit in the application form is just estimation.

You must also complete the report template and return it along with the funds raised, to the Monash Health Foundation in person or via Cashiers. Please return both the report template and the funds no later than **30 days after the conclusion of the event**.

Monash Health's Finance Department reserves the right to audit the financial records pertaining to events.

Direction of funds

Fundraisers are encouraged to nominate the hospital, service or department that they wish the funds to be directed to. The Monash Health Foundation will ensure the funds are forwarded appropriately.

Dual Beneficiaries

In circumstances where funds raised will be distributed between Monash Health and another not-for-profit organisation, the percentage of funds to be given to Monash Health must be stated in advance on the application form.

Donation canvassing

The Monash Health Foundation must be presented with a list of individuals and companies you intend to approach for donations to avoid duplication of donation requests. Please keep a record of prizes, services or other materials donated to your event.

The Monash Health Foundation would be pleased to prepare and send 'thank you' letters to these donors. We can also arrange 'thank you' certificates to be presented where substantial donations have been made.

Please provide the Monash Health Foundation with the names and contact details of your donors and supporters so that we can ensure they are recognized properly. We may also invite your donors and supporters to other donor recognition events through the year.

Receipts

Under Victorian state legislation, donations over \$2 are tax deductible. If you wish for receipts to be sent to donors, then please supply Monash Health Foundation with the names and addresses of your donors and the amount they have donated. Please forward donations and any other funds raised to the Monash Health Foundation within 30 days of the fundraising event to ensure receipts and certificates can be issued promptly.

Tax receipts will **not** be issued when anything is given in return e.g. raffle tickets, admission tickets, auctions items, and merchandise are not eligible for a tax receipt. The Monash

Health Foundation **cannot** issue tax receipts for donated services, e.g. Marquee set-up, entertainment etc.

Raffle Guidelines

All raffles held on behalf of Monash Health must follow the guidelines specified by the Victorian Office of Gambling Regulation Gaming No.2 Act 1997. Please specify the value of the prizes to ensure we follow the appropriate guidelines once your application has been approved.

Further information on raffles can be found at the following website:

<http://www.vcglr.vic.gov.au/home/gambling/new+applicants/community+and+charitable+gambling/raffle+frequently+asked+questions>

Please note that raffle tickets are **not** tax deductible. If donations are made in addition to a raffle ticket purchase, then the donation must be separated from the raffle tickets so that Monash Health can issue a tax deductible receipt highlighting the donation.

Fundraising Activity / Event Application Form

<i>Name of proposed activity / event</i>	
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Contact Information			
<i>Activity coordinator name:</i>			
<i>Organisation / Group:</i>			
<i>Postal Address:</i>			
<i>Phone:</i>		<i>Fax:</i>	
<i>Email:</i>			

Proposed Activity / Event Details			
<i>Date:</i>		<i>Time:</i>	
<i>Location:</i>			
<i>Please provide a brief description of the activity / event and how funds will be raised</i>			
<i>Please briefly describe your target audience</i>			

Expected Attendance:

Would you like funds raised to be allocated to a specific ward / unit / department / program within Monash Health? (please circle)

NO

YES

If YES, please identify where:

Will the proceeds be shared with another not-for-profit organisation?

NO

YES

If YES, please identify where:

Contact details:

Percentage allocated to Monash Health:

Will a raffle be held as part of this activity / event?

NO

YES

Total value of prizes

\$

* If YES, please ask the Monash Health Foundation for information about Raffle Legislation

Supporting Information – please provide any additional information about your fundraising activity / event, e.g. why you are organising the event etc.

Fundraising Activity / Event Proposed Budget

Income Source	\$ (amount)	Expenses	\$ (amount)
Sponsorship		Venue Hire	
Registration Fees		Food & Beverage	
Ticket Sales		Promotional Material	
Donations		Printing	
Other		Prizes	
		Other	
Total Income	\$	Total Expenses	\$
		Total Profit	\$

In Kind Support	
<i>Organisation Name</i>	<i>Description of goods / services provided (e.g. marquee, prizes etc)</i>

Fundraising Activity / Event Approval

By signing this form you agree to following terms and conditions

- All paperwork and funds raised will be returned to the Monash Health Foundation with 30 days of the completion of the activity / event
- All promotional material and publicity must be approved by Monash Health Foundation or Public Affairs and Communications prior to release

Applicant Consent			
Name (please print):			
Signature:		Date:	/ /

Please note your activity must be approved before promoting or holding the event. Acknowledgement of your application will be forwarded to you as soon as possible.

Please return your completed form either in hard copy or via email to:

Monash Health Foundation
 Locked Bag 29
 Clayton VIC 3168

Tel: (03) 9594 2700
foundation@monashhealth.org

Monash Health Foundation Use ONLY			
Approved		Not Approved	
Coordinator – Monash Health Foundation Signature:		Date:	/ /
Monash Health Foundation Contact:			