



Mercy Services

FUNDRAISING

Manual: Finance & Administration

Document ID: D.02

1. PURPOSE

Mercy Services conducts fundraising activities so that it has the capacity to fund services and capital improvements. Fundraising activities can also have secondary benefits of developing a clearer public perception of the Mercy Services mission and stronger public commitment to Mercy Services

The purpose of this document is to specify Mercy Service's expectations for fundraising practice to ensure that all fundraising is conducted in a legal and ethical manner.

2. WHO DOES THIS POLICY APPLY TO

This policy applies to the Board, staff and volunteers

3. POLICY

Mercy Services is committed to ensuring that all fundraising activities are carried out in an ethical manner

Mercy Services will seek funds to further Mercy Services' purpose and mission, and in so doing build ongoing partnership with donors through:

1. Fundraising and/or
2. Bequests

Mercy Services may sell something to others, at a price that closely reflects fair market value, with the promise that profits from the sale will be applied in furtherance of Mercy Services' purpose.

Mercy Services will ensure that staff/volunteers involved in fundraising activities have the necessary skills, resources and support.

4. PROCEDURE

4.1 Authorised fundraising

The CEO is authorised to:

- a) approve fundraising appeals and activities with an expected budget up to \$10,000
- b) Approve persons involved in fundraising activities
- c) sign written agreements with commercial traders who participate in fundraising appeals of which Mercy Services is a beneficiary;

4.2 Proper processes

All fundraising activities are in accordance with the Mercy Services Fundraising Standards and in the spirit of both the *Charitable Fundraising Act 1991* and the *Lotteries and Art Unions Act 1901* legislation

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4.3 Fundraising Communication

- 4.3.1 Although it is exempt from the Do Not Call Register requirements, Mercy Services will not make telephone contact to solicit donations from those listed on the Do Not Call Register
- 4.3.2 Care Partner Brochures are available for those wishing to make financial donations and make bequeaths.

4.4 FUNDRAISING STANDARDS

Mercy Service's guiding fundraising standards:

- a) Fundraising activities carried out by Mercy Services will comply with all relevant laws.
- b) Any communications to the public made in the course of carrying out a fundraising activity shall be truthful and non-deceptive.
- c) 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.
- d) All personal information collected by Mercy Services is confidential and is not for sale or to be given away or disclosed to any third party without consent.
- e) No general solicitations shall be undertaken by telephone or door-to-door.
- f) All fundraising activities must have the prior approval of the Board/ CEO
- g) A statement estimating income and expenses will be prepared prior to the commencement of any new fundraising activity that may present a financial risk to Mercy Services. Fundraising activities will not be undertaken if costs are likely to be in excess of 50% of the activities income.
- h) Fundraising activities will not be undertaken if they may be detrimental to the good name or community standing of Mercy Services.
- i) Financial contributions will only be accepted from companies, organisations and individuals the Board considers ethical.
- j) A report on fundraising will be prepared for inclusion in Mercy Services' annual report, if applicable.

5. KEY PERFORMANCE INDICATORS

Mercy Services adheres to all legislative requirements

6. EXPECTED OUTCOME

Fundraising at Mercy Services is conducted in both a legal and socially responsible manner.

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7. DEFINITIONS

Fundraising income at Mercy Services includes:

- a) Fundraising – any money as per the definition above including philanthropic trusts and company donations;
- b) Bequests – any money, property or gift left to Mercy Services in a person's will.

8. REFERENCES

AS 8000-2003 Corporate governance - Good governance principles
AS/NZS 4360: Risk Management
HB 254-2005: Governance, risk management and control assurance
Referenced
Anti-Discrimination Act, 1977(NSW)
Charitable Fundraising Act, 1991 (NSW)
Charitable Fundraising Regulation, 2008 (NSW)
Do Not Call Register Act, 2006 (Cth)
Health Records and Information Privacy Act, 2002 (NSW)
Income Tax Assessment Act, 1997 (Cth)
Lotteries and Art Unions Regulation 2007 (NSW)

9. OTHER RELATED POLICIES OR PROCEDURES

A.01 Values Policies

10. VERSION CONTROL AND CHANGE HISTORY

Version	Date Reviewed	Amendments
1.0	18.1.18	Policy reviewed and transferred to new Policy Template. Version 2 created.
2.0		

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