

Belonging Matters Donations and Fundraising Policy & Procedure

Purpose

Donations and fundraising activities form an important role in Belonging Matters fulfilling its mission and goals and enabling affordable resource for people with a disability and families. This policy outlines the Belonging Matters' requirements for the effective and ethical acceptance and management of donations and the conduct of fundraising activities.

Scope

This policy applies to all donations, bequests and fundraising activities (be they in cash or kind) and to anyone who is involved in the raising or receipting of funds donated for Belonging Matters. This policy does not apply to sponsorship.

Overview

Belonging Matters welcomes donations from its staff, individuals, governments and agencies, the business community and other organisations which support its Mission.

Donations may be used to support any endeavour consistent with the mission and goals of Belonging Matters including bursaries at training events for people with a disability and families, resource production and sharing, prizes, research, staff positions and/or to acquire equipment or goods. The funds may be expended completely or maintained as an endowment.

Belonging Matters is a registered as a Public Benevolent Institution (PBI), a Tax Concession Charity (TCC), and Deductible Gift Recipient (DGR).

Definitions

The following definitions apply for the purpose of this policy:

- a. Donation means a voluntary contribution or gift, whether in cash or kind. Donations will have the following characteristics:
 - i. There is a payment of money or a transfer of a gift;
 - ii. The payment or transfer is made voluntarily;
 - iii. The payment or transfer arises by way of benefaction (through a will or an estate)
 - iv. No material benefit or advantage is received by the donor.
- b. Donor means any person or organisation making a donation to Belonging Matters.
- c. Endowment is a donation made with the intention that funds are invested to ensure ongoing support for beneficiaries from the investment earnings.

- d. Fundraising Activity means all activities undertaken by or on behalf of Belonging Matters the aim of soliciting or receiving donations.
- e. Grant is the provision of financial assistance from a grant-making entity (such as a charitable foundation) to Belonging Matters. Grants may be treated as donations if the grant does not involve the return of any material benefit to the grant maker.
- f. Pledge means a documented commitment to make a donation within a specified period of time.
- g. Prospect means a prospective donor, ie. an individual or organisation with both the financial capacity and the likely inclination to support Belonging Matters via a major donation
- h. Recognition means actions taken by Belonging Matters to recognise the generosity of donors, individually or collectively.
- i. Sponsorship means a transfer of money or goods to Belonging Matters in a transaction where the sponsor receives certain specified material benefits in return.
- j. Tied donations refer to any donation given and received for a specified purpose that cannot normally be used for any other purpose without the donor's approval. For example, to specifically fund a project, the purchase of equipment. Tied donations may have an end date.
- k. Untied donations refer to any donation given and received for no specified purpose that can be used at the discretion of Belonging Matters

The principles underpinning this Policy are:

- a. transparent and ethical processes for the acceptance and management of donations and fundraising activities
- b. protecting the confidentiality of donors and sponsors consistent with their wishes and to the extent provided by law
- c. adequately identifying funds and using them for the purpose which they were provided
- d. compliance with all relevant legislation governing fundraising
- e. there will be a strategic, uniform and coordinated approach for the seeking and acceptance of donations

Policy

It is understood that participation in advertising and sponsorship will not generate pressure on the people who use the services of Belonging Matters, staff or board members to purchase particular goods or services, subscribe to particular beliefs or attitudes or pursue particular courses of action.

All donations in cash or kind are made to Belonging Matters with the intention of supporting its mission and goals.

Belonging Matters only accepts donations where they are ethical in nature and those that are consistent with the mission, values and policies of the Belonging Matters. It is our policy not to accept donations from organisations that have a bad record on social, financial and environmental conduct or whose operations impact negatively

on people who are vulnerable or at risk. Companies and organisations specifically excluded from making financial contributions to Belonging Matters include pharmaceutical/gambling/tobacco/alcohol companies or if the acceptance of donations will have a detrimental impact on the reputation of Belonging Matters

Belonging Matters reserves the right to refuse an offered donation.

In instances of a donation in which no material benefit is gained by the external party, the cost is GST exempt and tax deductible.

The solicitation of donated funds for Belonging Matters must be for the purposes of Belonging Matters generally or for specified projects

Any communications to the public made in the course of carrying out a fundraising activity shall be truthful and non-deceptive.

All personal information collected by Belonging Matters is confidential and is not for sale or to be given away or disclosed to any third party without consent. See our [privacy policy](#) for more information

No member of Belonging Matters may make formal approaches for fundraising purposes unless coordinated with, and approved through, the board of management which must approve all fundraising activities including appeals, events, and private requests.

Employees must seek advice from the Treasurer or CEO with regard to the potential impact on Belonging Matters prior to accepting any in-kind donation.

Nobody directly or indirectly employed by or volunteering for Belonging Matters shall accept commissions, bonuses or payments for fundraising activities on behalf of the organisation.

No general solicitations shall be undertaken by telephone or door-to-door.

A Fundraising Sub-Committee may be formed to carry out the major fundraising tasks. The Sub-Committee will report regularly to the Board of Management including tabling of meeting minutes at Committee meetings.

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 Belonging Matters. Fundraising activities should not be undertaken if they will expose the organisation to significant financial risk.

A report on fundraising will be prepared by the CEO or a representative of the fundraising sub-committee for inclusion in Belonging Matters annual report.

No person representing Belonging Matters is to engage in speculation about the taxation implications or legal status of donations with respect to the potential impact on the donor. Donors should seek their own independent advice about these matters