



Community Fundraising Guidelines

The Otis Foundation

Thank you for your interest in hosting an event for The Otis Foundation. We are grateful for your support of our organisation as your contribution will help us to continue our important work for Australians affected by breast cancer.

Community Fundraising for The Otis Foundation

The criteria considered by The Otis Foundation as being most important when approving individuals or organisations carrying out fundraising opportunities are:-

- **Compliance** – all Otis Foundation fundraising activities will comply with relevant legislation, as set out by each state and territory in Australia.
- **Integrity** – all Otis Foundation activities must maintain the integrity, values and image of the organisation and its brand
- **Quality** – The Otis Foundation will have a commitment to delivering high quality activities
- **Profile** – all fundraising opportunities will aim to add value to The Otis Foundation Logo and its work
- **Ethics** – ethical considerations will be taken into account when entering into partnerships
- **Loyalty** – the fundraising activity fits with The Otis Foundations' current partners and sponsors
- **Acknowledgement** – The Otis Foundation will take pride in appropriately acknowledging all contributions

THE OTIS FOUNDATION IS NOT INVOLVED IN RAISING FUNDS FOR RESEARCH INTO BREAST CANCER

THE OTIS FOUNDATION DOES NOT PARTAKE IN TIN SHAKING OR DOOR KNOCKING TO RAISE FUNDS

Who is The Otis Foundation?

The Otis Foundation provides retreats for those living with breast cancer at no accommodation charge.

The not-for-profit organisation is the legacy of Judy Burley, a young woman who lived with breast cancer for 9 years until her passing at 36 years of age. Proudly born in the Central Victorian township of Bendigo, The Otis Foundation has undergone a rapid and exciting expansion since the first guest stayed in 2002. The Foundation has properties in Victoria, New South Wales and South Australia.

The Otis Foundation retreats offer time out to relax, reconnect and regroup for those struggling with the challenges that come alongside serious illness. Each has been hand chosen for its location, in a beautiful environment which allows guests to draw on nature for strength and comfort. Partners, family members and friends are welcome to stay but often those who call on The Otis Foundation are looking for solitude or quality time with only those closest to them.

Our vision: *To reduce the psychological impact on those living with breast cancer, their families and communities through the provision of a national network of quality retreats provided at no accommodation cost.*

Our mission: *To provide sanctuaries to nurture those facing the challenges of living with breast cancer.*

Your responsibilities

As the Event Coordinator, you will be responsible for managing your event.

You will need to manage:-

- Finances – see Money Matters below and brief budget is required in the application form
- Resourcing – volunteers to help you and the necessary items to hold the planned event
- Marketing/Promotion – use of The Otis Foundation name and logo only with our approval
- Running of the Event – including managing any risks and insurance requirements
- Legal compliance – see Legal Matters below

Money Matters

- Keep accurate financial records, including receipts for expenses incurred and records of donations and moneys received.
- Take only reasonable expenses (such as venue hire and catering) out of the profit generated.
- Please do not incur any expenses in The Otis Foundations name.
- Please send in proceeds and financial records of the event within **2 weeks** of the event concluding.
- Clearly indicate to all those involved the expected outcome of the event.
- Retain and return collection tins if used without opening.

Legal Matters

- Ensure that you have appropriate liability insurance to cover your event, as The Otis Foundation ***insurance does not extend to external events.***
- You are conducting this event yourself – it is your responsibility as, even when we approve you to conduct the event, it does not become an Otis Foundation event but your event in support of The Otis Foundation.
- Ensure that you seek our permission before using The Otis Foundation logo in any promotional activities.
- Ensure you check the requirements for fundraising in your State or Territory generally found at your state governments Fair Trading or Consumer Affairs department as you will need to be covered and to comply.
- If you are conducting raffles be aware and ensure compliance with the separate legal requirements for raffles.
- Ensure you obtain the necessary approvals to hold the event if any are required from your local council, the police, the relevant road authority.

- Ensure you are not false and misleading in relation to the amount of money going to The Otis Foundation, the information you provide about The Otis Foundation or in relation to your connection with The Otis Foundation.

There are useful websites to assist you in organising the event and considering the legal and risk management issues such as www.community.com.au or, in Victoria, www.pilch.org.au/events

How The Otis Foundation will support you

The Otis Foundation will provide:-

- A variety of ideas for the type of fundraiser you can have
- Tips for planning and running your event
- The Otis Foundation logo for use in promotional activities
 - **PLEASE NOTE ANY USE OF THE OTIS FOUNDATION LOGO MUST HAVE PRIOR APPROVAL**
- The opportunity for you to promote your event on our website
- Collection tins for use at the event only and not for shaking in public places or events organised by others
- Resources and brochures about The Otis Foundation
- A letter of support to help you gather local backing and provision of goods and services
- A sample media release and general support and media advice where resources permit
- A certificate of appreciation for distribution to supporters/sponsors
- Receipts for people making donations
- Assistance and advice

Next steps

Once you are satisfied and are familiar with the guidelines, please complete the attached Community Fundraising Proposal.

PLEASE ENSURE THAT YOU LEAVE ENOUGH TIME TO GAIN OUR APPROVAL BEFORE YOUR EVENT AS THE OTIS FOUNDATION EVENT CANNOT GO AHEAD WITHOUT THIS PROPOSAL BEING SIGNED/ENDORSED BY US

If you need help with your proposal or if you are unclear about any of the guidelines please do not hesitate to contact The Otis Foundation on **03 5444 1185**

The completed form should be returned to :

The Otis Foundation
Po Box 1191
Bendigo Central VIC 3552

Approval Process

1. Send completed application as above or email this form to fundraising@otisfoundation.org.au
2. We will generally assess your application within 7 days - you will be notified of approval or decline accordingly.
3. If your event has been approved – you will receive an email with an Event number. Please include this event number with any correspondence.
4. If requested, you will be provided with The Otis Foundations Logo
5. If you have ordered collection tins or brochures, these will be posted to you

We appreciate your proposal to support our cause, however we ask that you understand our assessment process, and at times the need to decline involvement in certain events.