

Please read through the following pages of this document to ensure you understand your responsibilities as a fundraiser for CSG, the use of the CSG brand (name and logo), money management and legal requirements.

Before you start to organise your fundraising event, please complete and return the Fundraising Proposal and Agreement form. This will let us know how you plan to raise funds for CSG and promote your event and if there are any other resources you need from us to ensure your fundraising event is a success.

These forms can be found on our website www.cancersupportmallorca.com or by contacting rebecca@cancermallorca.com

CSG will send you a letter of approval with a Fundraiser ID number to confirm we have received your details and are happy for you to proceed.

Within 4 weeks of finishing your event, forward money raised to CSG along with your Fundraiser Results Summary page. Donor receipt templates, along with receipt books or any leftover marketing collateral should also be sent back to CSG.

CSG Fundraising Guidelines

Thank you for your interest in choosing CSG as a charity beneficiary for your upcoming fundraising event. Funds raised will enable us to answer more to assist more patients suffering from cancer on the island of Mallorca as well as help their family members.

To help make your fundraising event a success, and to ensure it meets relevant fundraising legislation, please read the fundraising guidelines below. These guidelines have been developed to assist individuals, schools, workplaces, clubs and community groups who are developing fundraising projects to benefit CSG.

1. Fundraising for CSG

1.1 These Fundraising Guidelines have been developed to assist individuals, groups and organisations (Fundraiser) who are planning to organise a fundraiser/event on behalf of CSG. A Fundraiser must agree to these terms and conditions by signing and returning the Fundraising Proposal and Agreement form. If approval to fundraise is granted by CSG these terms and conditions will form the basis of any dealings between CSG and the Fundraiser in relation to the fundraising event.

2. Authorisation

2.1 Fundraisers must provide CSG with:

- a clear written description of the nature, extent and duration of the fundraising event;
- an estimated budget of the proposed fundraising event;
- information about the group or individuals organising the activity.

2.2 Any individual or organisation organising a fundraising event on behalf of CSG must have a Letter of Authority to fundraise. CSG will issue the Fundraiser this letter if their Proposal is accepted and CSG is satisfied that:

- the fundraising event will produce a reasonable return after expenses have been deducted;
- the Fundraiser will supply a complete record of income and expenditure with supporting receipts and invoices within 4 weeks after the conclusion of the fundraising event;
- the fundraising activity fits in with the aims and value of CSG;
- the fundraising activity is not considered high risk.

2.3 The Fundraiser is not authorised to use CSG as its beneficiary charity until it has received the Letter of Authority. Permission to fundraise is issued for a period no longer than 12 months (or a time period otherwise specified by CSG to the Fundraiser), and within 4 weeks following completion of the fundraising event the Fundraiser must return the following to CSG:

- Letter of Authority;
- the records of income and expenditure and accompanying receipts and any used or unused receipt books.

2.4 The Fundraiser understands that CSG reserves the right to not approve or withdraw approval of this fundraising event at any time should the fundraising event or the fundraising event organisers fail to comply with these Fundraising Guidelines.

3. Organising the Fundraiser/Event

3.1 The fundraising event must be conducted in the name of the Fundraiser and is the sole responsibility of the Fundraiser. The Fundraiser must make it clear in all dealings with the public, sponsors and supporters that they are not employees or agents of CSG, nor are they acting in any other representative capacity.

3.2 CSG is not able to take a coordination role in organising the fundraising event and its officers cannot assist in soliciting prizes, organising publicity, or providing goods or services to assist the Fundraiser in the running of the fundraising event.

3.3 CSG does not provide public liability insurance coverage for Fundraisers. CSG suggests that Fundraisers may wish to consider holding their fundraising event at a venue that is already covered by public liability insurance.

3.4 If the Fundraiser intends to include extreme sports (such as parachuting, paragliding, bungee jumping or other extreme activities) or motor vehicle and motor bike racing as part of their fundraising event, CSG will require evidence of public liability insurance to cover the Fundraisers and participants before approving the fundraising event.

3.5 The Fundraiser must keep CSG up to date throughout planning for the fundraising event and must not proceed with the fundraising event without CSG's prior consent.

3.6 If the Fundraiser has a business they may wish to donate a percentage of sales over a period of time to CSG. The Fundraiser will need to contact CSG to make arrangements that satisfy CSG's guidelines for working with businesses.

3.7 For fundraising purposes, a child is anyone under the age of 18. The minimum age of children participating in a fundraising event as a volunteer is 8 years. There are specific codes of practice

associated with children in fundraising that may apply. Please discuss with CSG if you intend to involve children in your fundraising event.

3.8 The Fundraiser verifies that they are in proper physical/mental condition to organize and run the fundraising event and acknowledge that they are aware of the risks involved and voluntarily agree to assume those risks.

4. The CSG Name and Logo

4.1 Please remember that the event will not be a CSG event, but an event to raise funds for donation to CSG. All publicity, press releases and documents must clearly state this fact and indicate what proceeds will be donated to CSG (e.g. profit from ticket sales, money raised from raffles, auctions, etc.).

4.2 Any use of CSG's name and logo must be approved. Each fundraising event will be evaluated on a case by case basis and it is at the sole discretion of CSG whether name and logo usage is granted.

4.3 If permission for name and logo usage is granted, special conditions to be negotiated between CSG and the Fundraiser may apply, especially if the use of the logo is for marketing activities of the organisation.

4.4 All references to CSG in all promotional material (e.g. pamphlets, brochures or products), including text and images, whether taken from CSG's website and print materials or another source, must be submitted to CSG for approval prior to publication. In some circumstances CSG may need to issue express permission for a specific use of CSG's trademark or other brand elements and images owned by CSG.

4.5 If permission to use the CSG logo is granted, the Fundraiser must not alter, reproduce or amend the logo in any way that breaches the integrity of the trademark design (e.g. changes to colour, stretching or skewing original dimensions, cropping. or additions to the design) CSG may provide approved logo files for the purpose of the Fundraiser.

4.6 CSG may approve the use of an acknowledgement stating the relationship between the fundraising event and CSG. Suggested wording includes:

- "Proudly supporting Cancer Support Mallorca"; or
- "Funds raised help support Cancer Support Mallorca".

4.7 CSG cannot undertake media relations on behalf of the Fundraiser but may provide advice on producing media materials. Please notify CSG if you intend to approach any media regarding your fundraising event. All printed material, such as media releases must be approved by CSG. Printed material must be forwarded to CSG for approval prior to being printed or circulated. Forward requests to krista@cancermallorca.com

5. Money Management – finance, records and receipting

5.1 The financial aspects of fundraising, raffles, record keeping and management of the fundraising event are entirely the responsibility of the Fundraiser and the Fundraiser must comply with the local and national regulations.

5.2 The Charitable Fundraising Act and Regulations highlight the need to protect the public interest and accordingly CSG requires that Fundraisers:

- keep accurate financial records (including receipts and invoices), and hence provide CSG with an accurate record of income and expenses within 4 weeks after the conclusion of the fundraising event;
- where a bank account is set up to receive funds from the fundraising event, the account name must include CSG's name. All funds are to be banked into this account and the account must be closed after your event. Please notify CSG of the signatories to this account.

5.3 Some basic tips for record keeping include – keeping a folder with a number of plastic sleeves. Use individual sleeves to keep receipts, bank deposit stubs, cheques donated, donor pledge/tally sheets.

5.4 CSG cannot pay expenses incurred by you, but you can deduct expenses necessary to conduct the fundraising event from the proceeds of your event, provided they are properly documented. (As a guide, total expenses should be less than 30% of total proceeds).

5.5 Funds raised for donation to CSG cannot be used to make another donation to another organisation.

5.6 Any VAT associated with the cost of fundraising is the responsibility of the Fundraiser.

5.7 CSG can provide receipts for donations towards approved fundraising events. Individual receipts will be sent to the Fundraiser for distribution to attendees/supporters. CSG will provide the fundraiser with guidance for using receipts. It is the responsibility of the Fundraiser to familiarise themselves with these, and understand:

- circumstances when a receipt can be issued, and to whom
- the following are not tax-deductible: Ticket purchases (e.g. raffle), entry to an event, donations of goods or services, auction purchases;
- the legal implications of issuing receipts and the necessity of returning official, receipts books (used and unused) to CSG within 4 weeks of the fundraising event conclusion; and the reconciliation of funds.

6. Legal implications

6.1 The Fundraiser must comply with all relevant Legislation for fundraising and apply for any permits and authorities that may be required. Different states have their own legislation, which should be checked by the Fundraiser. The Fundraiser agrees that the information provided to CSG must be made available to regulatory authorities on request.