



FUNDRAISING POLICY AS AT 25 MAY 2020

PURPOSE:

CMTAA Inc. (CMT Australia) supports those who wish to undertake fundraising initiatives that further our Goals. The Association seeks to raise funds for three (3) main purposes being research, youth activities, and major administration activities. Whilst the Association encourages donations towards these activities through a range of channels, one that is particularly encouraged is fundraising based on activity initiated by our Members.

This policy has been prepared to provide guidance to those considering such initiatives, and to ensure that certain conditions are met in relation to CMTAA's responsibilities to its members, insurer, auditor, Australian Taxation Office, jurisdictional authorities, and members of the public impacted by the initiative.

APPROVED ACTIVITIES:

Any proposal to raise funds for CMTAA Inc. (CMT Australia) and purporting to be sanctioned by CMTAA Inc., (CMT Australia), must first be approved in writing by the CMTAA Committee. Through this approval those organising the initiative will come within the insurance cover of the Association, and appropriate protections are ensured for the organisers and the public.

In addition, CMTAA Inc. is an endorsed Deductible Gift Recipient under the Income Tax Assessment Act 1997, and is a registered charity in every Australian State and Territory (as required). CMTAA Inc. has a responsibility to manage all donations according to the various legislations managed by these agencies.

By conducting fundraising activities under this policy, CMTAA Inc. can be assured that it meets its financial and legal requirements and that those undertaking the activity have appropriate insurance cover and are aware of their responsibilities to CMT Australia.

SECURING CMTAA INC. APPROVAL:

To achieve approval, a proposer of such a fundraising activity should give the CMTAA Inc. Committee as much notice as possible. This is best done in writing through an email to info@cmt.org.au. Even if the details of the initiative are still to be finalised, early advice will enable the Committee to assist with some aspects, and to put in place the internal processes to expedite a positive response. The issues that need to be considered can be best identified through answering the following questions.

1. Who is proposing to conduct the event and how can they be contacted?
2. What will be the format of the event?
3. What is the proposed location of the event and in which jurisdiction(s) will the event take place?
4. How many people will be involved in organising the event?
5. How many people will take part in the event (other than the organisers)?
6. Over what period will the event take place (provide dates)?
7. What percentages in the following age brackets do you expect to participate (0-5), (6-18), (19-75), (over 75)?

8. If younger people are involved do the organisers have current Police Checks and Working with Children approvals?
9. What are the likely costs of conducting the event and how is it proposed to cover these?
10. What is the target funding to be raised?
11. Will the event involve an application to use the CMT Australia logo, and if so what for?

INSURANCE:

CMTAA Inc. (CMT Australia) has in place insurance to cover those organising events of its behalf, and Public Liability insurance for members of the public who are involved in the event. To reduce the costs of its annual insurance CMTAA Inc. limits its standard cover to the activities normally undertaken by the Committee and volunteers. The option exists to extend the cover where required for more active pursuits such as fun runs, cycling events etc. and this is why it is important that the Committee is made aware of the activities proposed for an event as early as possible. In many cases an insurance broker will agree to such a cover extension without additional cost; however this may involve a longer period of negotiation.

RESPONSIBILITIES AS A DEDUCTIBLE GIFT RECIPIENT (DGR):

To satisfy the Australian Tax Office endorsement of CMTAA Inc. as a DGR, all funds raised under this arrangement must be able to be accounted for and placed in a bank account separate from the normal operational funds for the organisation. CMTAA Inc. has established appropriate accounts and also provides receipts to donors.

For fundraising events conducted by a Member or group of Members, CMTAA Inc. has established a web based facility through 'ourcommunity.com.au' called 'GiveNow'. Under this arrangement three 'Causes' have been established. These enable donations to be received from individuals as a one-off, or a regular payment. This facility can then be extended through a 'CrowdRaiser' to facilitate those fundraising to design their own webpage specific to their particular fundraiser. This provides for independent reporting and promotion by circulating the web page link to friends etc.

All funds received through the GiveNow portal, to either a 'Cause' or 'CrowdRaiser' are made on-line using a credit card and are receipted directly by GiveNow. This ensures that CMTAA Inc. doesn't need to manage the privacy issues related to gathering credit card information. It also ensures that official receipts are issued and appropriate financial reports are managed for both the donors and the Association. Thus all requirements as a DGR are met through the GiveNow site in addition to making it much simpler for the organisers.

It is therefore a condition of approval of any fundraising initiative conducted on behalf of CMTAA Inc. (CMT Australia) that all funds are raised through the GiveNow website.

REGISTERED CHARITY STATUS:

CMTAA Inc. (CMT Australia) is registered with the Australian Charities and Not-for-profit Commission (ACNC). In addition to this requirement most State jurisdictions have their own charity registration systems which involve separate registration by CMTAA Inc. to enable fundraising in these jurisdictions. CMTAA Inc. holds charity registration status with all those jurisdictions which require formal registration. This ensures that CMTAA Inc. (CMT Australia) can raise funds and accept donations in every jurisdiction in Australia.

In some cases the jurisdictions impose special requirements and limitations on registered charities regarding the type of fundraising initiatives that they undertake. For this reason CMTAA Inc. needs to understand the proposed event to be conducted in its name so that it is possible to confirm beforehand that these special requirements will be met.

CMT AUSTRALIA LOGO:

CMTAA Inc. (CMT Australia) claims the exclusive rights to the 'CMT Australia Logo'. There are two forms of this logo, the first as displayed at the top of this policy document, and the second is a square format logo that is sometimes more suited to certain display formats. Whilst the Committee encourages the use of the logo for events on clothing etc. this also makes a public statement that the Association is backing the event and hence its reputation can be damaged if activities undertaken by fundraisers are seen as inappropriate by members of the public.

For these reasons the Committee has developed a 'CMT Australia Logo Usage' policy which is outlined in a document of the same title. Any proposed use of the logo during a fundraising event supporting CMT Australia requires the organisers to have first sought and received approval for the logo's use. This usage policy also requires certain questions about the event to be addressed so that the Committee can be satisfied that CMT Australia's reputation and exclusive rights to the logo will be preserved.

CMTAA INC. vs CMT AUSTRALIA:

The legal entity referenced in this document is 'Charcot-Marie-Tooth Association Australia' which is known by the acronym 'CMTAA Inc'. This is the name under which the Association is registered in New South Wales and in all its dealings with governments. It is also the name under which the bank accounts have been established and links to support facilities such as GiveNow.

More recently the Committee has responded to concerns about the complexity and possible mixed messaging when using this name in the public domain. As a result the simpler '**CMT Australia**' title has been adopted for all public facing and promotional materials. The new logo adopted along with this name predominantly displays the new name, but also notes the link back to the legal entity.

The Committee is actively promoting the new name 'CMT Australia' and for most fundraising initiatives this is the name that should be used by those undertaking fundraising.

This draft policy has been prepared by Robert Twin, Treasurer CMTAA Inc. for consideration by the CMTAA Committee.