Board Fundraising Policy

*Last updated July 2021*

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| --- | --- | --- | --- |
| Policy number | [insert number] | Version | [insert number] |
| Drafted by | [insert name] | Approved by Board on | [insert date] |
| Responsible person | [insert name] | Scheduled review date | [insert date] |

### Introduction

* 1. Board members have the responsibility of ensuring the survival and continuation of [Organisation]. This includes responsibility for ensuring funding is available to support the activities of [Organisation].
  2. While the Board may delegate many of the operations of fundraising to other parts of [Organisation], the Board retains the responsibility for inspiring other fundraisers, demonstrating the perceived importance of fundraising to [Organisation], and demonstrating their leadership in this area. To achieve this, each member of the Board must individually accept and be committed to their key role in the fundraising process.
  3. Board members should show leadership in fundraising by personally giving to [Organisation] in proportion to their ability to do so, and in recognition of the understanding that Board members who do not make financial contributions, which are within their means, will have difficulty asking others to contribute to [Organisation].

### Purpose

Subject always to the Australian Taxation Office rules surrounding donations and contributions made by ‘responsible persons’, this policy makes explicit the understanding that members of the Board will be asked to contribute to the fundraising activities of [Organisation], both from a time and financial perspective.

### Policy

* 1. Board members will be requested to:
* Donate money to [Organisation] in proportion to their ability to do so;
* Contribute to the short-term and long-term financial planning of [Organisation], including its fundraising plan;
* Support the fundraising efforts of other parts of [Organisation];
* Support special events run by [Organisation] to raise money or generate contacts;
* Where possible, consider and recommend prospective individual and corporate donors to [Organisation];
* When requested, approach prospective individual and/or corporate donors to ask for donations and contributions on behalf of [Organisation]; and
* When requested, sign letters and external communications to prospective donors on behalf of the [Organisation].

## Board Fundraising Procedures

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| --- | --- | --- | --- |
| Procedure number | [insert number] | Version | [insert number] |
| Drafted by | [insert name] | Approved on | [insert date] |
| Authorised person | [insert name] | Scheduled review date | [insert date] |

### Responsibilities

* 1. The Chair is responsible for bringing this policy to the attention of prospective Board members.
  2. All Board members are responsible for respecting and adhering to this policy.

### Processes

In the planning of its short-term and long-term fundraising strategies, the Board will make appropriate arrangements to draw on the contributions of Board members.

### Related Documents

[Ethical Fundraising Policy](https://communitydirectors.com.au/policies/ethical-fundraising-policy)

Investment Planning Policy

Code of Ethics

About this document

This policy sample has been developed by the [Institute of Community Directors Australia](https://www.communitydirectors.com.au?utm_campaign=policybank&utm_medium=doc&utm_source=website&utm_content=template) (ICDA), in conjunction with [Maddocks](https://www.maddocks.com.au/), and is free for any not-for-profit organisation to download and use, so long as it is for a non-commercial purpose and that the organisation is not paying a consultant to carry out this work. [See here](http://www.ourcommunity.com.au/general/general_article.jsp?articleId=2153#16) for our full copyright guidelines.

### Important notes

You should not rely on these sample policies and procedures alone. They are a starting point only. You need to adapt the sample policies and procedures to suit your own language and the specific requirements of your organisation.

Most samples include both policies and procedures. The policies are designed to provide guidance on standards, while the procedures give instructions on implementing the standards. We recommend adopting policies at a board level, while procedures can be developed and signed off by the organisation's CEO.

We use the term ‘Board’ to cover boards, committees of management, or anybody that has final authority in your organisation. The term ‘CEO’ extends to executive directors, or your chief administrator. You should change the terms in these policies to match the terms used by your organisation.

### Other policies

There are a number of policies available on the [Community Directors website](https://communitydirectors.com.au/tools-resources/policy-bank). You can search for what you need with our site search function.

### Make a deposit into our Policy Bank

If you have some policies that your organisation believes would be of benefit to other groups, email them to [service@ourcommunity.com.au](mailto:service@ourcommunity.com.au). We will review them, amend them so that they are applicable to the greatest number of not-for-profit organisations as possible, update them into our format, and upload them to our Policy Bank as an easily accessible resource.

### Join us!

ICDA is a best-practice governance network for the directors serving on Australia’s 600,000 not-for-profit boards, committees and councils, and the senior Workers who support them. ICDA members get access to a range of educational, capacity building and networking opportunities that build knowledge, connections and credentials.

If you appreciated this free policy, we would appreciate your ongoing support by joining ICDA from only $65 per year.

### The benefits of membership

1. Receive ‘responsible person’ status – ICDA members are recognised by the ATO under ‘responsible person’ rules, provided (among other things) that the member is not:
   1. a founder of the organisation;
   2. a donor to the organisation who has contributed more than $10,000; or
   3. an associate of a founder or a donor who has contributed more than $10,000 to the organisation.
2. Recognition – three membership post-nominal options, providing community and professional recognition for educated and engaged not-for-profit members;
3. Capacity building publications – including current trends, issues and emerging areas of risk via member-only newsletters and governance help sheets;
4. Policy alerts – receive notification when changes are made to governance, human resources, financial management, values and communication policies which have previously been downloaded through the Policy Bank;
5. Preferential member pricing – members receive discounts for the Festival of Community Directors events and online Compact Courses;
6. Alumni events – access to deep connections and a vibrant network of believers and doers. There is an online forum, as well as regular invitations to events such as the Communities in Control Conference;
7. Access to forums, networks, information and opportunities – boost your confidence (and competence) and open career doors; and
8. Budget-friendly – for as little as $65 a year you get all the benefits outlined above and so much more.

### Legal advice at a pre-agreed price

Please note that this is a template policy for guidance only. For assistance in tailoring this policy to suit your organisation, or for legal advice at a pre-agreed price or training in this area, please do not hesitate to contact Our Community’s preferred legal supplier [Maddocks](https://maddocks.com.au).

E: [NFPHelp@maddocks.com.au](mailto:NFPHelp@maddocks.com.au) | W: <https://maddocks.com.au>