

# Tool Kit for Supporting Community Fundraising



**FMS has been fortunate to work with clients in Sydney's north shore and the Central Coast for many years and we have gained the respect and appreciation of many clients. We have always played an active role in supporting our community and are currently committed to assisting the following organisations;**

**The Spastic Centre ~ Riding for the Disabled ~ Parkinson's NSW Inc.**

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In 2007 FMS' Christine Hornery was awarded the **Community Planner of the Year in 2007** by the **AMP Foundation** and in July 2009 FMS were the winners of the **Telstra Small Business Award - Sensis Social Responsibility Award for NSW**.

*"There are a number of factors that make our business unique but primarily it is the people within our business, our professional and caring approach and the passion with which we provide our advice and services,"* said Principal of Financial Management Solutions, Christine Hornery.

FMS community involvement programme has become an integral part of our business. It has helped us to grow our business and the team spirit of our staff. We have prepared the following information which may be of assistance to an organisation considering supporting a community & charitable organisation.

## **What are the benefits for a small business to support a charity or community based organisation?**

As your business grows and becomes successful, you may have been contacted by community groups seeking your assistance through sponsorships, donations or the participation in events. Large corporations generally have a social responsibility or community involvement programmes, and it can also be a great idea for small businesses.

Following are some reasons why your company should consider supporting a charity or non-profit organisation in your community:

### ***The opportunity to give something back***

This is FMS's number one reason to seek out a charity to support. It has allowed us to share and pass on some of our good fortune and success. Doing so within our local community has also resulted in business benefits.

### ***Marketing Opportunities***

Charity and not-profit groups usually have some sort of recognition programme which promote the companies that have supported them via the donation of money, time, products or services. People are more likely to support businesses they feel are part of their local community.



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### ***Community Good will***

Being part of the community is critical for the success of many small businesses as they generally rely on the local area for their trade. One way to ensure that your business grows is to help build a prosperous community.

### ***Marketing Opportunities***

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### ***Support a cause you believe in***

It is great if you can tie your business purpose to a particular charity, but if you cannot, you can pick a charity or community group that you are passionate about and support them.

### ***Your support doesn't have to be a drain on your bank account***

Many organizations, particularly those at the local level have needs for time and services as well as cash. Contact the group you would like to help and ask them if there are volunteer opportunities available.

### ***The chance to be involved***

Getting involved in your community can be a great business strategy for many reasons. Charity and community groups allow you to know others and network with the other participants of the group. This type of interaction is a great way to get valuable market research and feedback which is often difficult for a small businesses' to gather.

## 5 Easy steps to get your programme up & running

1. Research what organisations are seeking support in your local community. Whether it be a group providing services to the disabled, animal rights or a sporting group, be sure to research the organisation first. Review their websites, ask your local Chamber of Commerce, or other local supporters about them.
2. For a small business we would recommend picking one "preferred" group that you can focus your support, time and money on. Choosing a group that you feel passionate about or can relate to will assist you to add value to that organisation.
3. Also review the levels of sponsorship or support the organisations are seeking and how it aligns with your business goals. The sponsorship commitment of some larger organisation may prove to be too expensive for many small businesses. However, within smaller, local group there may be many opportunity to show your support. You may have the opportunity to buy a small ad in programs or yearbooks, or sponsor a hole in a charity golf tournament, or supply soft drinks for a bbq. For a relatively small dollar investment you gain a good amount of goodwill.
4. Once you have determined which group/s you wish to support make contact with them and discuss what you can offer them and visa versa. Ascertain what business development opportunities are available through the sponsorship. Can you link your website to their site to raise awareness of their cause via your clients and can put your logo and details on their site. Many organisations have structured involvement programmes which they will happily provide you with.
5. Get out there & good luck. No matter how big or small your endeavors, we know that you will find this a very rewarding programme! And as we have learned at FMS - *you only get out of it what you put in.*

## How much involvement should I have?

Now that you have made the decision on what organisation that you wish to be involved with. The next question you must ask yourself is how you will be involved and more importantly how you can add value. As you want the partnership to have a successful and well co-ordinated fundraising event we have found that being involved and taking an active role within that event committee has been a tremendous success. In the first year this may require more hands on but if this event is an annual event there will be less demand on your valued time as the years go on.

## How can you add value?

The silent volunteer army that underpin our local charities and non profit organisation bring different skill sets to the table and you will quickly identify what skill set you can add. Many of these skills are absorbed in the day to day management of the organisation e.g. Surf lifesaving volunteers require skilled training. As we prefer watching the water rather than being in the water our skill set has been the ability to assist in project management of fundraising events. These successful fundraising events will not only raise the necessary funds but will assist in acquiring new volunteers as well as retention of volunteers.

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## How can this event be successful?

### Step One – Event Committee

Generally all organisations have a small core of people that are passionate and are actively involved about improving the image and financial sustainability of the organisation. These are the people that need to be encouraged to belong on the event committee. These people usually have the following skill sets – they are visionary and are able to make decisions, are trustworthy and are willing to document processes and follow instructions and most importantly to work in a team environment. There is no room for lone rangers.

### Step Two – Choose the event

It is important to channel your resources to maximize outcomes. Too often many fundraising events fail and do not reward the efforts put in due to unrealistic expectations and poor planning. There are five basic need principles that I have applied to all our fundraising events they are to –

- identify the need, what is it we want to do, what do we want to do it for, is there a need, do we believe in it and are we passionate about it.
- research, local and wider, have others been successful if so how did they do it, if not why not? Will the local and wider community support the need, will it appeal to them?
- plan, how are we going to meet that need, what steps will we put in place and when are we going to do it. What can we do internally and what resources do we need that are external to us. What is it going to cost and what our expected outcomes are, how much do we want to make from the event.
- market the need, people aren't aware of the need until they know about the need.
- measure the outcome of the need. Has it been successful, what did we do that worked and what can we improve on.

Well documented information and processes can be a great resource tool for new and old committees to ensure that charities and community organisations remain financially viable and sustainable.

I also categories Fundraising events into three categories low, medium or high. These measures are then applied to the cost, the input and the returns to maximize outcomes. Following is some tips and traps around fundraising events that I have experienced...

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## Step Three - Project Manage your event

The event will not be successful if it conflicts with other dates internal and external to the organisation.

See Annexure A for a sample [Marketing calendar](#)

You commence by formulating a marketing calendar for all the organisations events.

Secondly, block out all public holidays and depending on the event school holidays. Check with other local charities, councils and event facilities that there are not similar events on at the same time.

Set a budget for your event

What level of funds do you want to raise, how much is the event going to cost.

The event committee needs to research –

Venue Costs – Hire and decorating

Catering Costs – what type of catering is required?

Entertainment – microphones, live bands

Artwork– Tickets, posters, Printing and Advertising

Speaker fees

Public liability licence, possible licence requirements

10% Contingency

*Wherever you can, try and obtain as much as possible for nothing or at a reduced charity rate*

See Annexure B for a sample [Event Budget link](#)

*Tip: Do not confuse quantity with quality and do things on the cheap or cut corners. People will not attend again; you have one chance and once chance only to make the event successful.*

Book a venue (choose a suitable venue and location, that is accessible for all) and book entertainment, MC and select catering requirements. Each step must be recorded on the action sheet and should indicate who is responsible and due date. Establish event framework, timings etc and confirm legal obligations ensuing (e.g. Raffles over \$10,000) - can be 12 months before the event.

Prepare media publicity for the event - Email/newsletters broadcast for the event - 2 to 2.5 months out

Prepare a special invitation guest list—2 months out

Brochure/invitation out and commence marketing campaign - 6 weeks out

Finalise venue logistics and catering/transportation/entertainment - 2 weeks out

Write running sheets indicating responsibilities for the day of the event

Finalise attendee numbers and notify all involved (venue, services etc) - 3 days prior

Co-ordinate and manage responsibilities for team members—3 days prior

See Annexure C for a sample [Action Sheet Link](#)

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## **Step Four – The Event**

Ordinarily entertainment groups will want to be at the venue at least four hours before the event to ensure that setup of equipment is completed before the first guest arrives and that the sound is perfect.

Catering teams will normally arrive between 4-5 hours before the commencement of the event to set up tables, workstations and prepare food. This may vary depending on your catering needs.

Ensure that all team members responsible for the event arrive at least two hours before the event commences and they understand their roles on the day. If they are handling cash ensure that two people are always present this will minimise any risk in cash handling.

## **Step Five – Review the event**

You need to determine if the event was successful and was mutually beneficial to you and the organisation.

Were your goals and objectives achieved? Was it a financial success? Have you thanked everyone involved? What was the feedback? What did you do well, what could have been improved, was it fun?

Can this event become an annual event of the organisations and your calendar.

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## **Fundraising Event Overview**

### **Fundraising calendar**

*Calendars are a low cost, low input with comparable profit returns. Generally requires selling of advertising space on the calendar pages to local organizations who also agree to offer them for sale to their clients.*

**Tip** – *make sure that there is a market for your calendar, the content of the calendar appeals to many and that you have a wide distribution base to sell your calendar to and that the price is fair and reasonable.*

**Trap** – *printing can be costly and may force you to order more than you can sell. If using pictures make sure you get permission to use them.*

### **Raffles**

Raffles can be either a low, medium or high cost depending on the type and number of prizes selected. The selling of raffle tickets requires a large effort by a lot of people over a long period of time but can prove to be very profitable.

**Tip** – *try to get as many items at cost or donated reducing costs to low so that you can maximize returns. Select raffle prizes that are appealing and make ticket prices affordable. Utilize Centres of Influence to promote raffle ticket sales. For example if you are trying to raise funds for a local sporting organisation encourage all members of that organisation to be involved in the sale of tickets. This will widen the distribution base; sell more tickets, increasing profits. Canvass suppliers to donate goods or provide them at cost. You may like to offer an incentive to who sells the most tickets.*

**Trap** – *ticket sales may be less than budgeted for as some people find it difficult to sell raffle tickets.*

### **Golf Days**

*These events can be fun. They are low cost, medium input with a high return as long as they are planned properly. These events need to have a couple of golfers on the organizing committee. Hole sponsors can vary from \$250 to \$1,000's, golfers are charged the course fees plus a fundraising % to participate and ordinarily a golf club will allow you to raise funds from additional activities on the day.*

**Tip** – *It is a good idea to have an end of day event such as a presentation that can also be an auction of donated goods or services from local organizations and companies. Everyone loves a drink at the 19<sup>th</sup>.*

**Trap** – *Do not select a golf course that is too difficult for novice players...it is supposed to be a fun event.*

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## **Themed Formal Functions, Charity Balls and Dinners**

These events require a great deal of time commitment prior to the event, are reasonable in cost structure and have the potential for the maximum return. The most important three critical areas of running a successful formal function can be identified as where is it at, what are we going to get, how much are we going to pay? These are the venue, the entertainment, the food and drinks and the ticket price. The success of this type of event is in the planning, the research and the testing.

**Tip** – *commence planning for this event at least 12 months before the event. Don't be afraid to audition entertainers, sample menus and drinks, barter the cost of event decorators and facilities. Dedicate 30 minutes of the event day/evening to raising additional funds from other fundraising ideas such as auctions, raffles, buy a balloon; all facilitated from donated goods.*

**Trap** – *do not confuse quantity with quality and do things on the cheap or cut corners. People will not attend again; you have one chance and once chance only to make the event successful.*

## **Auction**

This will take awhile to plan, there is a lot of preparation and teamwork needed locating sale items and handling everything at the event. Auctions can be an event in themselves, or held in conjunction with a gala. If the majority of the sale items are donated, an auction can have the greatest financial reward.

These are just a few to help you get started. There are many more fundraising ideas and opportunities available such as themed nights, book sales, tasting events, trivia night, fashion parades etc. Remember in all cases to apply the basic principles and clearly document all steps and outcomes.

**Tip** – *There are sporting memorabilia outlets that will provide you framed autographed prints on consignment that can be returned if they fail to meet the reserve price. Try to have a wide selection of Auction items that is appealing to all event attendees—know your target market.*

**Trap** – *Having too many items can make the auction process lengthy, having only sporting items can wane your guests enthusiasm to spend money. Remember people come to a fundraising event to donate money.*

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Annexure A

**Monthly Marketing Calendar - 2010**

	Quarter one			Quarter two			Quarter three			Quarter four		
<b>Activity/Event</b>	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Public Holidays												
School Holidays												
Heading 1												
Heading 2												
Heading 3												
Heading 4												



### Fundraising Event Budget

Item	Details	Budgeted Cost	Actual Cost	Total	Variance	Cost Allocation
<b>Event One</b>						
Venue cost						
Entertainment						
Hire						
Decorating						
Marketing						
Artwork						
Printing						
Other cost						
				<b>Total - \$</b>		
<b>Event Two</b>						
Venue cost						
Entertainment						
Hire						
Decorating						
Marketing						
Artwork						
Printing						
Other cost						
				<b>Total - \$</b>		

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