



Sponsorship, Fundraising and Grants Forum

Creating Sustainable Community Organisations

February 22, 2017

**Presented by:
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AGENDA

5:30pm	Introductions
5:40pm	Sustainable community organisations
	What is required for your organisation to be sustainable?
	Financial planning and Project planning
	Sponsorship, fundraising and grants
6:30pm	Short break and networking
6:45pm	Grants
	Sponsorship
	Fundraising
7:20pm	Questions and wrap up

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1. Sustainable Community Organisations

Governance/Direction

- Successfully achieves organisations purpose.
- Clear roles, processes, values, accountability frameworks
- Long term strategic plans with shared purpose and direction.
- Business plans.
- Informed stakeholders.
- Responsive and relevant to needs of stakeholders and community.
- Innovative and continuous improvement.
- Risk approach and processes.

Financial

- Sufficient financial resources.
- Long term financial plan (e.g. 3 – 5 years).
- Financial management procedures and controls.
- Strong collaborations and partnerships.
- Economic model that values human, social and cultural capital.
- Diversity of funding sources.

Connected and Resilient

- Strong connections and networks in community.
- Resilient.

Succession planning

- Succession plan and actions.

What is required for your organisation to be sustainable?

2. Financial Sustainability

2.1 Long Term Planning

- 3 – 10 year strategic and financial plan (work with financial expert/accountant).
- Operating and capital works (equipment, acquisitions etc) budget.
- Strategic Plan = Financial Plan = Human Resources.

2.2 Annual Budgeting

- Review all income and identify other opportunities.
- Review all expenditure and processes to ensure costs a minimised.

Income opportunities

- In-kind
- Donations
- Sponsorships/partnerships
- Funding, grants
- Crowd sourcing
- Philanthropic/Trusts/Foundations
- Ticket sales (- commissions, costs)
- Participant fees
- Spectator fees
- Stallholder, concession fees
- Vendor site fees
- Exhibitors, information stands
- Raffles
- Merchandise (cost of goods and sales; licence fees)
- Fundraising
- Parking
- Bar sales/beverage sales
- "Friends of"; members; supporters; alumni (past members)
- Subscriptions
- Advertising (program, venue, clothing)
- Hospitality
- Print, TV, radio (in-kind)
- Websites, social media (advertising)
- Packages
- Marketing/ Advertising revenue
- Special events (e.g. sausage sizzle)
- Identify ways to maximise revenue sources and cash flow (e.g. online selling; sponsors/supporters selling tickets for you)

New income opportunities:

3. Funding, Fundraising, Sponsorship Projects

Projects, Events, Programs:

- Does it align with organisations purpose and goals?
- Does it have the support and approval of the Committee/Board?
- Can organisation apply for funding, fundraise, obtain sponsorship (within rules/ constitution)?
- Is there sufficient time to fundraise, raise sponsorship, obtain grant?

Brainstorm all aspects of the project with:

- Committee (and members where applicable).
- Stakeholders/partners.
- Others who have done similar projects, and with interest in outcomes.

Determine the project scope:

- What **does** it include, what **doesn't** it include?
- What's** realistically achievable with resources available?
- How** will we do it – list all the tasks involved.
- Who** needs to be involved – committee, specialists, trades etc?
- How much** will it cost? What are available resources (cash and in-kind)?
- What** support is available – time, expertise, in-kind, pro bona?
- Communications** - who do we need to involve, communicate with, advise?

Develop timelines, stages, milestones:

- When** will we do it? Scope the timelines and be realistic (**allow contingency time**).
- Key stages** (e.g. planning, concept, design, procurement, construction).
- Identify potential **variables** (e.g. delays due to weather, approval dates).
- Key **milestones** (possibly aligned to payments) and estimated dates.
- Determine meetings/mechanisms to **monitor project**.

Risk assessment:

- Determine risks associated with project and develop solutions. Examples:
 - Occupational health and safety issues.
 - Succession planning, skills, people management, conflict.
 - Volunteer involvement, burnout, availability, differing opinions.
 - Budget blowouts or changes.
 - Timeline extensions.
 - Project scope creep (the project becoming larger or different than originally anticipated).

4. Potential Revenue Sources

Funding / Grants - money provided by government, business, community or philanthropic organisation for a specific purpose.

Sample sources:

City of Wodonga: www.wodonga.vic.gov.au

Victorian Government: <http://www.vic.gov.au/grants.html>

Commonwealth Government: <http://www.grants.gov/>

Our Community/Funding Centre (\$85 - \$400):
<http://www.fundingcentre.com.au/grant/home>

Philanthropic: <http://www.philanthropy.org.au/seek-funding/>

Sponsorship / Partnerships – money (or in-kind / pro-bono support) provided by government or business where the support is acknowledged.

Donations – money (or in-kind / pro-bono support) provided by a business or organisation where the support does not need to be publicly acknowledged.

Different GST and tax implications.

o <http://www.fundingcentre.com.au/donation/home>

Fundraising – money raised through a variety of activities for not-for-profit purposes. Includes crowdfunding, appeals, intersection/highway collections, events, auctions, sale of goods etc.

5. Funding / Grants

5.1 Providers

- Government- local, state, federal.
- Business / corporate.
- Philanthropic (trusts etc)
- Foundations.

5.2 Issues

- Highly competitive.
- Online applications.
- Applications may be assessed by expert judges, videos, public voting etc.
- Multiyear vs. single year.
- Greater focus on:
 - Accountability – governance/management
 - Risk analysis
 - Evidence
 - Actual outcomes
 - Partnerships
 - Evaluation – what worked, what didn't work
- May take a few years to get funding
- Time consuming!

Buzz words

Community

Social fabric

Big data

Social change

Measurable results

Outputs

Inputs

Outcomes

Impacts

Longevity

Sustainability

Partnerships

What are you seeking a grant for?

Beware:

- Imposed priorities, policies, processes (funding guidelines) that don't align with your goals.
- Timeframes that can't be achieved.
- Unrealistic expectations and burdens imposed.

5.3 Grant Definitions

Grant – one-off provision of money.

Funding – may be one off or describe a longer-term funding agreement.

Project – has a clear purpose, a start date and an end date.

Inputs – resources devoted to a project. E.g. money, time of volunteers, donations, other grants.

Outputs - what is produced by a project. E.g. 100 attendances, new building, resurfaced courts.

Outcomes – benefits of the output. E.g. increased participation in sport and recreation by a specific group.

Impacts - long term or indirect effects of the outcomes. E.g. better community health, improved community engagement, economic benefit from new jobs.

Goals – broad statement of what you want to accomplish. Common words: Produce, provide, improve, establish, deliver, increase, construct...

Objectives – steps towards accomplishing your goal, something you are working towards, a result you are aiming to achieve.

Objectives should be SMART (see below), quantifiable, outcomes (e.g. increase participation), identify target audience or community.

SMART - **S**pecific, **M**easurable, **A**ttainable/**A**chievable, **R**ealistic, **T**ime-bound.

Methodology – how the objectives will be achieved.

In-kind – goods or services that are provided free.

Retrospective – expenses before you sign a funding contract.

5.4 The Funding Cycle



- Check whether you are eligible?**
- Understand “why” the funding is being offered.
- Does it align with what you are doing?
- Does it align with relevant local, regional, state plans?
- Have you read guidelines and are you able to meet funding conditions?
- Do you have the resources to put together the application, manage the project and acquit the funding?
- Is the timing right – have you the evidence, support, resources etc?

6. Your Funding Application

6.1 Utilise available tools

- Project management tools – task lists, timelines, milestones, responsibilities, costs.
- Gantt charts –tasks, timelines, responsibilities.
- Collaboration tools – online file sharing – e.g. Dropbox, Google Drive.
- Quoting templates.
- Budget templates.
- Agreement templates – cash and in kind contributors.
- Letters/email templates.
- Monitoring and evaluation templates and survey tools.
- Acquittal templates.

6.2 Before you apply

- ❑ **Read** Guidelines, Application form, other associated information – then read them again!
- ❑ Only apply if there is a direct alignment of your project/event with **your goals/purpose**.
- ❑ Obtain the support of key stakeholders.
- ❑ Decide whether the time is right to apply (or whether you need to do more work, feasibility analysis etc).
- ❑ Ensure project is in your Strategic Plan (long term plan) which:
 - is current and up to date
 - has broad involvement, consultation and ownership
 - includes proposed project and shows how it aligns with purpose of organisation
 - identifies links to local, regional, state, national plans/issues.

6.3 Prove the need for your project / application

- ❑ Collate research and other data to support the **need, rationale, justification** for the project.
- ❑ Evidence from **credible, accurate, up to date (current), reliable** sources.
- ❑ Determine what constitutes **sufficient** evidence – numbers, statistics, research, feasibility analysis (funding body will advise how much is sufficient).
- ❑ Collate evidence from:
 - **Your data:**
 - Internal analysis of your data: numbers (including trends), ages etc.
 - Any feasibility studies, research etc you have conducted.
 - Feedback from members/participants.
 - Consider collating data now for future projects (e.g. to build in 5 years).
 - **Supporting data and evidence:**
 - Peak body, regional organisation, industry – e.g. plans, research.
 - State/Federal Government – Australian Bureau of Statistics (ABS), Plans, population data etc.
 - Local Council – local profiles, Strategic Plans, Feasibility Studies, research.
 - Academic research, reference journals etc.
 - Local data – demographic, psychographic etc.
 - Media reports – newspapers, TV, Radio etc.

Examples of information sources:

City of Wodonga - <http://www.wodonga.vic.gov.au/about-us/corporate-documents/strategies-plans-policies/>

REMPPLAN Economic Profile: <http://www.economicprofile.com.au/wodonga>

Australian Bureau of Statistics: <http://www.abs.gov.au/>

Local areas stats: <http://stat.abs.gov.au/itt/r.jsp?databyregion>

Data and analysis: <http://www.abs.gov.au/websitedbs/censushome.nsf/home/data>

Funding Centre (an enterprise of ourcommunity.com.au) – includes a range of links to data, statistics, research tools and sites.

<http://www.fundingcentre.com.au/help/fundraising-statistics>

Community Indicators Victoria: <http://www.communityindicators.net.au/>

VicHealth: (subscribe to newsletters)

<https://www.vichealth.vic.gov.au/media-and-resources/publications>

Industry specific/area of interest newsletters, publications, research

NOTE: Assessors do read your Plan and associated data/research.

6.4 Collate information to support your application

- Example information required:**
 - Annual reports.
 - Incorporated Association and Constitution details.
 - Financial details – annual budget, audited statements, tax/accounting details.
 - Strategic Plan and Risk Strategy and other Plans relating to the project.
 - Photographs, maps etc.

- Planning** – e.g. obtain concept plans, designs, architectural drawings, conduct pre-feasibility studies etc.

- Obtain **letters / evidence of support**
 - From key stakeholders and those providing an input/income.
 - Include exactly what will be provided by the supporting organisation.
 - Start collating early and consider providing a draft template.

- Evidence that relevant organisations approve – e.g. Crown Land, land owners etc.

- Obtain quotes, estimates, specifications**

- Investigate and obtain building / planning permissions, permits etc

- Determine insurance requirements

6.5 Write your Application

Before You Start

- Discuss project with the funding body.
- Read ALL** guidelines **AND** background information.
- Honestly answer the question – does your project:
 - Align with the purpose of the funding?
 - Is it ready to commence? Is timing right? Are funds available?
 - Have we done enough planning and do you have the evidence?
 - Do you have the right support?

When you start your application

- Involve a skilled writer.
- Answer the question directly and succinctly. Don't use long sentences.
- Never leave a question blank.
- Ensure grammar and spelling is correct.
- Check with funder on what to include- e.g. photos, media coverage and other information as attachments.
- Allow plenty of time – start planning before round opens.

Funding Assessors

- May have no knowledge of your project – therefore don't assume they will know and understand acronyms, industry jargon etc.
- Likely to be reading hundreds of pages of applications. They will respond better to clear writing that addresses the questions. Avoid irrelevant and duplicated information.
- Be aware of the **scoring and weightings** associated with each question and ensure the appropriate amount of information is provided for each question. Assessors are not able to deviate from the scoring and weightings allocated to each question.
- Assessors will generally have a YES, NO, MAYBE pile – you need to get your application into the YES pile in the first round of assessment.

6.6 Answering Questions

ABOUT Your Organisation

- ❑ Assume assessors knows nothing about your organisation. Include its purpose, key goals and who is involved.

WHAT will you do? (e.g. Describe your project, what will you achieve etc)

- ❑ Describe exactly what you are seeking to do (the project) and what the **outcomes** will be.

WHY do you want to do project?

- ❑ Describe why you are doing the project – why it is needed, what evidence (data, statistics, research, trends) supports the need, what issues it is addressing and what outcomes will result.

WHO will benefit?

- ❑ Describe who will benefit including specific details such as the number of people, ages, genders, demographics, from where, specific groups etc. Include how they will benefit.
- ❑ If the funding program focusses on a specific target market, describe who will benefit and how.
- ❑ Include evidence from key stakeholders/beneficiaries such as reports, recommendations, letters of support (i.e. indicating how they will benefit and the need).

HOW will you manage the project?

- ❑ Include your governance/management structure, your project management details (include a project plan where appropriate), who will be involved and what their roles are, any specialist or contract support being provided.

Expected **outcomes, outputs, impacts?**

- Describe what will be achieved and quantify where possible.
- Relate to what the funding program is seeking to achieve.

- **Outputs** - what is produced from program/project/event. E.g. 100 attendances, new building.
- **Outcomes** - beneficial effects because of the program/project/event. E.g. 20% growth in participation; 100 more people accessing the service.
- **Impacts** - long term or indirect effects of the outcomes. E.g. Improved community engagement.

WHEN will the project be undertaken?

- Describe timeframes, start and finish dates and key milestones.

WHERE will project be?

- Describe location in broad terms if applicable (e.g. within City of Wodonga boundaries) or specific location if applicable (e.g. address, town, venue).

6.7 **Financial Details / Budget**

- Balanced, honest and realistic budgets.
- Past financial details.
- May require long term financial plan and how will you survive without the funding.
- Clarify with funding body the level you can apply for and matching dollars needed.
- Clarify type of in-kind or pro-bono support allowed, how hours are calculated (\$rate/hour), and maximum allowed in-kind contribution.

Income:

- Your contribution – cash and in-kind.
- Other contributions including cash, in-kind, pro-bono.
- Partner contributions – e.g. Local government, other organisations.
- Sponsorships, donations, fundraising (e.g. crowdfunding).
- Funding body will want evidence of **confirmed income.**

Expenditure:

- ❑ Identify all project costs.
- ❑ Break into component parts – Examples:
 - Project management costs
 - Pre-project work – e.g. site inspections/preparations
 - Concept design, detailed design, architectural drawings
 - Construction
 - In-kind (e.g. labour, specialist skills, services, goods)
 - Cost of servicing and recognising sponsors and project partners (e.g. plaques, openings)
 - Contingency (often around 10 - 15%)
 - Estimate expenditure in line with key milestone (aligned with partial payments).
- ❑ Consider all likely costs. Examples:

○ Project management	○ Planning	○ Marketing
○ Labour	○ Equipment	○ Events/launches
○ Fees, charges, licences	○ Services	○ Travel
○ Plant	○ Goods, materials	○ Venue
○ Building	○ Design	○ Catering
○ Specialist expertise	○ Legal	○ Insurance
	○ Communications	○ Contingencies
	○ Administration	○ Training
	○ Printing	
- ❑ Document all aspects that require quoting in as much detail as possible.
- ❑ Get quotes: 2 – 3 preferably, in writing, and quoting on exactly what's required.
- ❑ Get written agreement for in-kind or pro-bono contributions.
- ❑ **Balance budget: Income = Expenditure**
- ❑ Don't include expenses (including planning time) prior to funding being obtained (retrospective expenses before the project begins are not permitted in funding applications). *Retrospective – any expenses before you sign a funding contract.*

APPLICATION TIPS

- ❑ Where possible, use the same language used in the Guidelines, and the terminology used by the funding administrators.
- ❑ Directly answer the questions...and align with the assessment criteria.
- ❑ Use future tense... the project **will**: design..., deliver..., construct, the outcomes **will be** ..., **when** the project is completed (not "if funding is received")
- ❑ Use strong and confident terminology...project will directly benefit..., upon opening the facility will
- ❑ Clearly outline the outcomes (e.g. improved access to physical activity), the beneficiaries (e.g. 100 young people aged 12 - 18 who have not previously engaged with the service), and by when (e.g. by the end of year 2 of the project).
- ❑ Get someone who does not know about your project to read the application. Get them to check they understand the project and that you have answered the questions.
- ❑ Read final submission requirements carefully – make sure you attach details where required and submit in required format. Get application proof read before submitting it.
- ❑ Keep within word limits.

6.8 Funding Contracts

If you are **successful** be prepared to:

- ❑ Confirm who the key contacts are for the funding body.
- ❑ **Negotiate** a funding agreement – where possible negotiate timelines, payment schedules, progress report timelines, reporting arrangements and acquittal dates
- ❑ Clarify any **ambiguities in funding agreement** – clearly understand all the obligations and conditions.
- ❑ Set **realistic timeframes** including some contingency.
- ❑ **Notify** key stakeholders.
- ❑ Ensure everyone involved knows their **roles, responsibilities** and the timeframes.
- ❑ Set regular **meeting dates** to manage the project (and regularly check you are complying with funding conditions).
- ❑ Set mechanisms in place to manage the **administration** associated with the grant including issuing invoices, making payments, reporting etc.
- ❑ Establish what you will need to put in place to **acquit and evaluate** the project (do this at the beginning of the project).
- ❑ If it appears the project is not going to schedule, immediately notify the funding body to discuss and negotiate a **variation**.
- ❑ Set a mechanism in place to ensure **funding body gets required recognition**, invitations etc.

Unsuccessful applicants

If you are **unsuccessful**, follow up with the funding body to find out why. Establish a good relationship with the funding body.

6.9 Funding Acquittals and Evaluations

WHY are they required?

- ❑ Accountability and transparency of your organisation and the funding body.
- ❑ Public money – reducing budgets means greater pressure on funding bodies.

HOW to do an evaluation/acquittal

- ❑ Allocate resources to ensure your project is fully acquitted and evaluated within the agreed timelines.
- ❑ Ensure claims are processed according to schedule.
- ❑ Ensure accountant is across funding and tax/GST implications.
- ❑ **Record keeping** - collect data and information throughout project in preparation for evaluation:
 - Financials (including audited statements if required)
 - In-kind contributions
 - Attendances
 - Milestones
 - Photos
 - Launch details
 - Case studies
 - Specific outcomes/outputs as stated in application
- ❑ Complete required acquittals and audits within timeframes.
- ❑ If unable to meet timelines, notify funding body immediately (not the day or week its due ...as soon as you know!)

7. Sponsorships / Partnerships

7.1 Sponsorship Policy and Planning

- ❑ Develop Partner/Sponsor Policy - identify what is and is not acceptable. For sample policies see:
www.communitydirectors.com.au/icda/policybank/
 - Consistent approach to sponsors, agreements, rights, obligations
 - Define sponsorship versus donation
 - What will and won't be accepted

What aspects of event, organisation, project can be sponsored?

What benefits can you provide to sponsors/partners?

- ❑ What are the costs associated with each area of your event/project?
 - Can these be offered as partnership/sponsorship packages?
 - Provided via in-kind sponsorship e.g. expertise, services, products, infrastructure, equipment and personnel.

- ❑ **In-kind** sponsorship should be sought to off-set **real costs** in the budget.

If it's not off-setting a real cost, consider how much time, money and effort is required and whether it is worth the effort.

7.2 Potential Sponsors

- ❑ What is the businesses target market?
- ❑ How does it fit with yours?
- ❑ **Know your audience:** postcodes, surveys, attendance numbers, marketing, online etc.
- ❑ Seek sponsors where there are obvious links but don't ignore the not so obvious!
- ❑ Where company has sponsorship guidelines, read them carefully and analyse whether there is an alignment – call to check.
- ❑ **What will they want out of the sponsorship?**

- ❑ **Determine sponsor's motivations**
 - Increased brand awareness and profile within the community and to your target audience.
 - Improve sales, test a product or service.
 - Improve their image.
 - Promote a message to the community.
 - Obtain positive publicity from supporting your event.
 - Obtain opportunities to network with other people.
 - Be a good corporate citizen and give back to the community.
 - Achieve other outcomes you have not considered!

7.3 Benefits available to Sponsors

- ❑ What **benefits** can you provide to sponsor?

Be creative and think beyond logos on signage, website, posters and fliers!

- ❑ Brand inclusion on signage, website, posters, fliers, posters, etc.
- ❑ Hospitality – involvement or hosting of specific functions.
- ❑ Tickets to event, VIP passes, opportunity to meet guests, access to your celebrities.
- ❑ X number of free tickets.
- ❑ Naming rights (e.g. overall event or specific parts of the event).
- ❑ Major sponsors, supporting sponsor, proudly presented by... official product supplier, official merchandise supplier.
- ❑ Sponsorship of specific aspects of your event/project/club – e.g. a marquee, clothing, caps, prizes.
- ❑ Involvement in your event/club – selling/giving away product, testing of products, a stall/stand etc.
- ❑ Special offers to your event/club visitors or members – e.g. discount coupon, flier in kits, mail-outs etc.
- ❑ Signage – on site (different locations worth different amounts depending on exposure).
- ❑ Sites, zones, locations, venues, stages.

- ❑ Naming of days (e.g. Day 1 Partner), rounds, competitions, programs, ceremonies, awards.
- ❑ Brand inclusion – clothing, street flags/banners, letterhead, signage, vehicles, website, media releases.
- ❑ Merchandise rights; sampling opportunities; information distribution.
- ❑ Website – logo, links, banners (on your website and theirs), articles/features about the sponsor on your website.
- ❑ Social media – “like” your sponsors. Identify social media opportunities.

Valuing sponsorship packages:

- ❑ Determine cost of servicing the sponsorship (providing the benefits offered) and double the amount (rough estimate only – will depend on circumstances).
- ❑ Consider what sponsor will get for their investment (e.g. exposure, access to people), and how much they will be prepared to pay for it.
- ❑ Keep some benefits aside to surprise the sponsor.
- ❑ How are you going to separate sponsorship levels? E.g. Naming rights (overall, specific components), major, product sponsors.
- ❑ What benefits can you offer to sponsors and what are costs? (e.g. tickets, hospitality, printing, signage, installation, advertising, time, legal advice etc).
- ❑ What type of sponsors are going to have a similar target audience to your event audience?
- ❑ Determine who is the best person to approach sponsors?

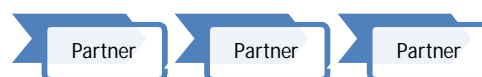
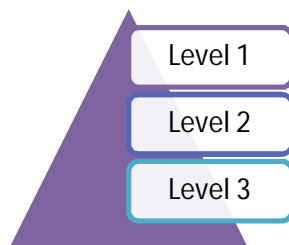
- ❑ **Identify potential sponsors and partners. Decide how to approach?**

7.4 Approaching sponsors

- ❑ Why should they support your project? What's in it for them?
- ❑ Identify who is the best person to contact potential stakeholders?
- ❑ Decide how to make the approach:
 - E.g. phone call, meeting, coffee, attend events, functions etc where stakeholders may be present.
- ❑ Don't be afraid to talk to people about your project/event.
- ❑ Ensure you know the full costs the benefits being offered.
- ❑ Always tailor to individual sponsors.
- ❑ Contact sponsor in advance of submitting a written proposal to discuss your proposal and what the sponsor is seeking.
- ❑ Where possible, present your proposal in person.
- ❑ **Negotiate** – don't assume what you offer will benefit a sponsor. Be prepared to negotiate, but ensure fairness and equity.
- ❑ Ensure you highlight the benefits, fun, rewards from being involved.
- ❑ Structure sponsorship offers to suit your event/project.

Be prepared to **tailor packages**. *Examples:*

- Hosts, friends, supporters, champions, sponsors, partners
- Naming/Title rights
- Presenting partner
- Category sponsor
- Product partner
- Supplier partner
- All equal levels
- Level 1, 2, 3



The following sponsors / donors will be approached:

Sponsorship opportunity	Target audience	Benefits offered	Sponsors to approach	Value of sponsorship

7.5 Sponsorship Agreements

- Get agreement in writing.
- Include benefits, what they will provide and who is responsible for what.
- Obtain agreement regarding the amount, payment terms (timing etc.), GST, invoicing requirements, and expectations of both parties.
- How will they assess it? Do you need to collect information?
- Key timelines (e.g. when you need their logo).
- What will sponsor be doing to leverage their investment?

Cash and In-kind Sponsorship

- Cash – consider GST, tax and other implications; get the agreement in writing
- In-kind – identify cost savings (e.g. infrastructure, services, equipment) to off-set cash costs. Identify the actual value and treat similar to cash sponsor (may have GST implications).

7.6 Sponsorship Proposal

Sample Sponsorship Proposal

- Brief overview of event – purpose, goals, date, time, venue
- About your organisation - who, structure, brief history etc.
- Key target market – who attends your event (type of people, age, location, likes, interests, numbers).
- Benefits your event delivers (to local community etc).
- What you can provide to sponsors (the benefits).
- Outline opportunity to be involved and costs (or in-kind support being sought).
- Differentiate between levels (e.g. exclusive naming rights, support sponsor).
- Marketing and Communications Plan.
- Charitable status (if applicable).
- Your contact details and timelines.

Sample Cover letter

- Organisation is offering a sponsorship opportunity for....
- Opportunity details: E.g. On *date*, the *organisation* will host the *event* featuring.....
The *event* attracts 1,000 from the *local community*.
- Audience details: Outline numbers, type of audience, where they are from and any other information available.
- Benefits of sponsorship: Details of what the sponsorship opportunity is and what they will get.
- What you will do to make the sponsorship work; how you will drive business to the organisation; what opportunities can be offered.
- Call to action: Date/time you will call, or contact details.
- Your contact details.

7.7 Sponsorship Hints

- Start early – 12 months' lead time is not uncommon.
- Treat as a **special** business partnership (not in same way as suppliers etc).
- Ensure you don't involve other businesses that are **direct competitors**.
- **Treat in-kind sponsors** just as you would cash sponsors (according to value and benefits offered).

Allocate a dedicated person to liaise:

- Invite to functions, events, provide tickets.
- Accurate database and invite the right people.
- Assist with parking, introductions, photos etc.
- Publicity opportunities.

Deliver what you promise:

- Where possible, deliver more, surprise and delight!
- If you can't deliver, tell them as soon as possible. Renegotiate where possible.

Provide information to sponsor:

- Know what they want, and provide sponsors with sufficient details for **their reporting** requirements.
- Detail **achievements and outcomes** of sponsorship.
- **Benefits provided to the sponsor** - as per agreement plus your bonus benefits.
- **Photos** highlighting the sponsorship acknowledgement.
- **Media/publicity** obtained for event.
- Make them want to come back next year!

Keep in contact regularly and acknowledge sponsors throughout the year.

Review sponsorships and discuss what can be improved.

Invite potential sponsors to your event, organisation etc.

8. Fundraising

8.1 Fundraising

The *Fundraising Act 1998* (the Act) defines a fundraiser as any person or organisation, including a business, that collects money for a beneficiary, cause or thing, rather than solely for their own profit or commercial benefit. This includes collecting food, clothes and other items on behalf of a person or organisation.

Source: <https://www.consumer.vic.gov.au/clubs-and-not-for-profits/fundraisers/what-is-a-fundraiser>

8.2 Fundraising Compliance

- ❑ Local Laws – Permit for door knock/tin shake/soliciting gifts - <http://www.wodonga.vic.gov.au/downloads/images/Door%20knock,%20tin%20shake,%20soliciting%20gifts.pdf>
- ❑ Collecting (tin shakes) on Highways – Victoria Police Permit. See [Highway Collection Application Form](#).
- ❑ Raffles, bingo, gaming – Victorian Commission for Liquor and Gambling Regulation
 - Minor Gaming permit – raffles where total prize exceeds \$5,000
 - <http://www.vcglr.vic.gov.au/>
 - Declared community and charitable organisations
<http://www.vcglr.vic.gov.au/home/gambling/existing+licensees/declared+community+or+charitable+organisations/>
- ❑ Consumer Affairs Victoria (registration – fundraisers): <https://www.consumer.vic.gov.au/clubs-and-not-for-profits/fundraisers/registration>
- ❑ Exemptions from Fundraising Registration - <https://www.consumer.vic.gov.au/clubs-and-not-for-profits/fundraisers/registration/exemptions-from-registration>
- ❑ Not for profit Law - <http://www.nfplaw.org.au/fundraising> - Permits required from Consumer Affairs Victoria, VCGLR (lottery, bingo, gaming), issues when fundraising across State boundaries.

8.3 Fundraising Information

- ❑ Victorian Government, Not for Profit Compliance Support Centre (collections, raffles, fundraising events, tax)

<http://www.nfplaw.org.au/fundraisingandevents>

http://www.nfplaw.org.au/sites/default/files/media/Guide_to_Fundraising_1.pdf

<http://www.nfpcompliance.vic.gov.au/fundraising>

- ❑ <https://www.fia.org.au/> - Fundraising Institute of Australia

8.4 On-line fundraising / crowd funding examples

Examples:

- ❑ <http://www.pozible.com>
- ❑ <https://www.kickstarter.com/>
- ❑ <https://www.chuffed.org>
- ❑ <https://www.givenow.com.au/>
- ❑ <https://au.gofundme.com/>
- ❑ <https://www.mycause.com.au>
- ❑ <http://www.clarety.com.au>
- ❑ <http://www.fundingcentre.com.au/crowd/home> - checklist for crowdfunding

Fundraising suppliers and ideas

Examples:

- ❑ <http://www.fundraisingdirectory.com.au/> - directory of fundraising ideas
- ❑ <http://www.australianfundraising.com.au> – fundraising suppliers

8.5 Online Fundraising Tips

- Read the hints/tips/information on relevant website.
- Sell/tell your story concisely.
- Use great pictures, videos or graphics.
- If offering rewards/recognition, make sure you know the actual value and differentiate between different levels of support.
- Consider offering rewards that cost you very little, but are highly valued.
- Set time limits for your campaign and PROMOTE IT.
- Develop promotion plan prior to going "live". Use multiple media (e.g. media release, Facebook, emails).
- Deliver on what you promise.
- Communicate with your supporters.

8.6 Fundraising Plan

- Key goals/target - purpose
- Compliance requirements
- Banking/financial arrangements, GST, tax deductibility etc
- Activities
- Timelines & calendar
- People (internal, external), partnerships, supporters
- Costs
- Communications
- Research / information
- Cohesive leadership and full support of organisation
- Massage your message – clear and convincing
- Excitement, interest, a connection.

9. Further Information

Below are useful links for grant information, financial and legal issues and volunteering.

- **Not-for-profit Law Information Hub**, Legal information for community organisations, <http://www.nfplaw.org.au/seekingfunding>
- **Grassroots Grants**, A resource kit for community organisations seeking funding, Regional Development Victoria, Small Towns Program, managed by the Municipal Association of Victoria.
<http://www.ruralcouncilsvictoria.org.au/wp-content/uploads/Intro.pdf>
- **The Funding Centre**, An enterprise of www.ourcommunity.com.au,
<http://www.fundingcentre.com.au/grant/home>
- **Probona Australia**, Top 10 Tips for Grant Writing,
<http://probonoaustralia.com.au/news/2012/11/top-10-tips-for-grant-writing/> and
<http://probonoaustralia.com.au/>
- **Philanthropy Australia**, <http://www.philanthropy.org.au/>
- **Australian Taxation Office**, Gifts and Fundraising,
<https://www.ato.gov.au/non-profit/your-organisation/gst/grants-and-sponsorship/>
<https://www.ato.gov.au/non-profit/gifts-and-fundraising/>
- **CPA Australia**, Not-for-profit, Grants in Australia: Management and accountability made easy for not-for-profit organisations, 2012
<https://www.cpaaustralia.com.au/~media/corporate/allfiles/document/professional-resources/notforprofit/grants-in-australia.pdf?la=en>
- **Arts Law Centre of Australia**, Keeping the Fun in Funding,
<http://www.artslaw.com.au/articles/entry/keeping-the-fun-in-funding/>
- **Australian Sports Commission**, Funding and Grants,
<http://www.ausport.gov.au/supporting/funding>
- **Volunteering Victoria**, <http://volunteeringvictoria.org.au/?s=grants>
- **Volunteering Australia**, <http://www.volunteeringaustralia.org/>
- **Institute of Community Directors** – Policy Bank,
<https://www.communitydirectors.com.au/icda/policybank/>

10. APPENDIX A: Generic Template – Sample Project Plan

PROJECT DETAILS:

Activity	Who	Start Date	Finish Date	% Complete	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Submission Preparation																
Collate evidence		1/01/2017	1/03/2017													
Obtain quotes		2/03/2017	3/03/2017													
Confirm partnerships		2/02/2017	4/05/2017													
Letters of support/approval																
Draft application																
Meeting with funder																
Finalise application																
Submit application																
Notification Date		30/07/2017														
Funding Agreements			30/08/2017													
<i>Invoice for payment 1</i>			30/09/2017													
Project Initiation																
Advise partners and stakeholders																
Confirm brief and negotiate with preferred suppliers																
Appoint sculptor																
Obtain final site approval																
Notify affected businesses																
Sculptor to undertake preliminary work																
Committee to finalise plans																
Invoice for payment 2																
Sculptor to create artwork																

Plaque organised																
Site preparation commences																
Installation dates																
Final landscaping																
<u>Launch</u>																
Invitations issued																
Media release issued																
Catering organised																
Launch date																
<u>Acquittal and Evaluation</u>																
Post event report																
Stakeholder thank you' s																
<i>Invoice for final payment</i>																