

Financial Management Module

- Budgeting
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- Sponsorship
- Annual Legal Requirements



Budgeting

The club will require an annual budget and should be aligned to the club annual plan, this is the responsibility of the treasurer. Once the budget is approved by the committee, it can be added into your accounting system so that it can be compared to the club's actual income and expenses.

To prepare a budget:

Start with actual income and expenditure from the previous year, include any new entries as determined by the annual plan. If the club is new you will have to base this upon realistic estimates, add what you know about the coming year, adjust and modify until you have a realistic and reasonable budget, then get the budget approved by your management committee or governing body.

See below an example of a budget template:

CLUB BUDGET TEMPLATE - INCOME AND EXPENDITURE														
PROJECTED CASHFLOW FOR THE YEAR ENDED 2013														
Income	Budget	YTD Inc	Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bar Sales														
Subscriptions - Players														
- Non Players														
Fund Raising														
Clubroom Rental														
Subsidy/Grant														
Sponsorship														
Total Receipts														
EXPENDITURE	Total Budget	YTD Exp	Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Affiliation Fees														
Accountancy Fees														
Audit Fees														
Bar Purchase & Expenses														
Cleaning														
Club Licence														
Gear & Equipment														
General Expenses														
Insurance & ACC														
Coaching Expenses														
Repairs & Maintenance														
Etc.....														

Funding Calendar

- Contact the funders for a current application form and guidelines.
- Rank potential funders as to how likely they are to fund your project so you can focus on where you are most likely to succeed.
- Where possible, spread applications throughout the year to distribute the workload evenly.

	Funder	Funder	Funder	Funder	Funder	Funder
Project						
Amount requested						
Supporting documents sent						
Closing date						
Date sent						
Decision due						
Result \$\$						
Accountability due						
Accountability done						
Comments						

Remember:

1. It may take months for funders to make their decision, so allow for this in your planning.
2. Most funders will not fund a project in retrospect (the date may be either the close off date or the sitting date so ensure applications are in well in advance)



Fundraising Tips: The Basics

Based on a summary of James Austin's (Fundraising Institute of New Zealand) fundraising presentation to SGT lunchtime Code Forum, Thursday, 26 Feb 2015

Themes:

- ASK, ASK, ASK! If you use the proper strategies, and adequately thank your donors, there's no limit to how often and who you ask.
- But you need to know what is realistic.
- Organisations need to secure regular monthly cash flow -- a reliable source of income.
- Encourage donors to donate via automatic monthly bank transfers.
- Say thank you and then ask again.

Who should we look to for money?

- Looking for the big donor is NOT the right path.
 - They already have their charity agendas.
 - They are surrounded by people who are good at saying "No."
- Look around you first -- close proximity then outwards.
 - Board, Major Donors, Management, Special Staff
 - Sponsors, Clients, Volunteers, Staff, Donors
 - Former Participants, People with Similar Interests, Your Suppliers, Community, Friends
- How might they give, (top of list requires least work to bottom of list requiring the most work)
 - Bequests (personal contact, [include a charity](#))
 - Capital Gift (personal contact)
 - Major Gift (personal contact, letter [see samples below], phone)
 - Repeat / Upgrade Gift (personal contact, letter, phone)
 - First Time Gift (direct mail, street appeal, event, door-to-door)
 - Universe of People and Prospects

Methods of Fundraising

- Recommended
 - CrowdFunding ([kickstarter](#), [Indiegogo](#), [RocketHub](#)), can be shared on your website and emails, as well as on social media, like facebook, twitter, etc.
 - Direct Mail
 - Still the largest form of fundraising
 - One method for multiple purposes (appeals, thank you notes, etc)
 - Face to Face
 - Clipboards in the street is the fastest growing form of fundraising



- Not Recommended
 - Large Events (fancy dress, auction, entertainment, etc)
 - Large expense for little return
 - Grant Writing (gaming trusts, community trusts)
 - NOT fundraising for long-term growth

Writing Fundraising Letters

Tips on writing letters from <http://fundraisingcoach.com/>:

1. Mail multiple times

You should mail 3-4 times a year. It will help increase the odds that your letter reaches donors while they're in a "giving mood." And, more practically, mailing that frequently will help you keep up with address changes!

Additionally, the end of the year is a very generous time of the year, so be sure to use that to your nonprofit's advantage.

2. Write from one person to another.

Studies show that a letter signed by a "committee" or even by two people don't perform as well as letters sent by one person. So why reinvent the wheel. Just picture your ideal donor and write a letter to her. Be conversational. Use emotion. **Talk about the donor, not about the non-profit.**

If you don't believe that, check out Tom Ahern's video on how refocusing a newsletter from the organization to donors helped a nonprofit raise 1000% more: <http://bit.ly/501videosTomAhern>

3. Don't write literature. Write something that could be read at 60 mph

In his book [Don't Make Me Think: A Common Sense Approach to Web Usability](#), Steve Krug says that web designers try to write literature when they should be writing billboards that could be read by a reader driving by at 60 miles per hour.

The same is true for fundraising letters.

Your donors are busy and distracted. Their world does not orbit around your non-profit. So make your communications easy for them to digest.

- Use bold headings
- Align text to the left, don't justify it
- Use bullet points

Do whatever you can to break up the text so that even a skimmer will "get" your call to action.



4. Use a P.S.

This is so basic. Eye studies have shown for decades that people first glance to see if their name is at the top of the letter **and then look at the postscript.**

The most read message in your fundraising letter is the PS!

So make it good. Tell them what you're asking them to give for what purpose by what time. Keep it short, one or two lines max. And always include a deadline even if it's "by the end of the month" or "before December 31st." We respond well to deadlines. They help us sort out what needs to be done now and what can wait.

If your funding is needed now, be sure to let donors know. Otherwise it will end up in the "it can wait" pile (aka the trash can).

More Tips

From www.fundraiserhelp.com

The Ask: Secrets Of Donation Requests

In the fundraising profession, the act of requesting funds from a donor is called "the ask." When you are writing a fundraising letter and you arrive at the place where you must actually, ahem, request a donation, you have arrived at the ask. And the ask, as you probably know, is one of the toughest things to get right in fundraising.

Where in the letter should you mention money?

Early on in your letter you should let your reader know why you are writing. Somewhere "above the fold," usually in the second or third paragraph, describe the reason for your letter.

Here is an example:

"The people of Afghanistan have already suffered 20 years of conflict and three years without rain. One and a half million are dead. Two million are disabled. And now this: the UN is predicting that the number of Afghans facing hunger and deprivation will soon reach 7.5 million."

"Something has to give. Or someone has to give. That's why I'm writing to you during this crisis. Will you give? You can save lives and avert disaster by sending a donation to Doctors Without Borders right now."

How much should you ask for?

Ah, the perennial question. As fundraising letter expert Mal Warwick would say, "that depends." How much money you request of each donor depends on many variables, including:

size of the donor's last gift

size of the donor's average gift



amount that most organizations like yours ask for
specific need that you are presenting to the donor
size of your donor base
donor's capacity to give
donor's affiliation with your organization
length of time the donor has supported you

As you can see, the amount of money that you request in your direct mail fundraising letters depends on too many variables for me to give you an average figure to aim for in every appeal.

How many times should you request a donation?

Ask for a gift more than once in your letter. At a minimum, bring up the topic early on, and ask again for a donation in your conclusion.

Another good place to request funds is in your postscript (your P.S.). Some of your asks can be hard asks ("Give today") and others can be soft asks ("Your gift will make a difference.").

Still More Tips

From Fired Up Fundraising

<http://www.gailperry.com/2013/09/dont-make-5-mistakes-fundraising-appeal-letter/>

DON'T MAKE THESE MISTAKES

1. Your call to action is weak.

Lots of letters I see beat around the bush. They don't tell the donor explicitly what step to take.

You've simply got to tell people what to do! And you have to lay it out in very specific words.

Give them the next step. Say: "Please fill out the reply card and send it today."

Say "the xxx needs you today. Please make a gift right now."

Use the word "today."

Use the words "right now."

That gives the letter a sense of urgency and a deadline.

The donor needs both – so she'll take action and not set your letter aside to consider later.

MUST DO: Make your call to action completely explicit.

2. You are not asking enough times in the letter.

Tom Ahern says that there should be asks all over the place. Your letter should be full of asks.

That's what the letter is for, isn't it?

We looked at an appeal letter he recently wrote and it was chock full of asks.

Tom says there are different types of asks.

1. Soft asks.
2. Implied asks.



3. Hard asks.

MUST DO: Use all these different ways of asking in your letter:

- “Please join . . . “
- “I need you. Xxx needs you.”
- “Can’t do it without you.”
- “Take part.”
- “Take these two steps. . . “
- “Make your gift right now.”

3. *Your type font is too small.*

One of the main things he hears about is that the letters are hard to read.

The new standard for appeal letters is 14 point type.

Your likely donor is a woman who is over 50 years old. She needs to be able to read the dang letter, right!

MUST DO: Always use 14 point type.

4. *The word “you” is not showing up enough.*

Tom and I looked at his appeal letter and we counted over 20 uses of the word ‘you.’

He said that “you” is an emotional trigger. It IMMEDIATELY pulls people in.

If you don’t have “you” and “your” showing up tons and tons in your letter, throw it out and start over!

MUST DO: Add the word “you” wherever you possibly can.

5. *You are not mailing often enough to your donors asking them to renew.*

This is amazing.

Tom says that the reason your donors are not renewing their gifts is NOT that they don’t like you anymore.

It’s that you don’t remind them enough.

He says “what really kills your response rate is that your donors throw your letter away.”

Some of the nonprofits he works with mail 5-6 times during the year asking donors to renew their gifts from last year.

Gotta keep mailing your donors!

And the nonprofits get a 40-60% response rate on their letters – because they are in front of these donors – constantly putting offers in front of them asking them to join in and renew.

MUST DO: You’ve got to stay after your wonderful donors with plenty of reminders to renew their gift!



Sample Donation Request Letters

INSERT YOUR LETTERHEAD

Dear Insert Name,
(Remember to use 14-pt font.)

[***Use an opening that tells a personal story about someone who will directly benefit from this funding. Give your introduction a human-interest angle that your reader can connect to. You want the reader to identify with the people that make up your organisation. You want your reader to be driven to help the real-life people who will benefit from his/her donation.***]

[***Include a picture of the person in the story. Photos help potential donors connect with your cause.***]

It is with your help that we can reach our goal of raising \$_____ by DATE in order to PURCHASE / BUILD / REPLACE _____. [***Insert story about how the money will have a direct, positive outcome on a real-life person. Perhaps reconnect to the story mentioned in the first paragraph.***]

We appreciate donations, both big and small. Almost all of our fundraising comes from members of our ORGANISATION'S community, everyday people just like you who want to help. These acts of generosity are simple, but have a huge impact on INSERT DEMOGRAPHIC, people like EXAMPLE FROM FIRST PARAGRAPH.

You can help us today. [*** Insert time pressure. Why is this money needed now? What will happen without this money?***]

If you are interested in making a donation, you can do so by using the enclosed donor envelope.

[*** Insert options of how much they can donate (i.e. \$10 will buy 1 XXX, \$35 will buy 5 YYY, \$125 will buy 5 ZZZ).***]



Remember that you can spread your donation out over the course of the year by making automatic payments. Just \$5 per month, the cost of 1 cup of coffee, can provide INSERT ITEMS.

Feel free to give me a call at PHONE NUMBER with any questions or concerns. We thank you in advance for your support!

Best Regards,

NAME

HANDWRITTEN SIGNATURE

TITLE

[*** Insert P.S. (e.g.) Your donation of \$10, \$25, or \$50 is urgently needed by INSERT DATE to help us raise money for INSERT PURPOSE. Please donate today or, if you have questions, please contact me at EMAIL AND PHONE #.]



Some Online Resources for Fundraising

[9 Storytelling Mistakes Your Nonprofit May Be Making](#)

[do it yourself fundraising](#)

[10 dos and donts for your fundraising appeal letter](#)

[how to ask for donations](#)

[donation request letters do's and don'ts](#)

[fundraising e-mail](#)

[Essential Elements of a Fundraising Letter](#)

[how to write more effective fundraising letters](#)

[how to write the perfect fundraising letter](#)

The Perfect P.S. on your letter

[10 pointers to the perfect ps for your next fundraising letter](#)



Tips for Writing Thank You Letters

From nonprofit.about.com

Get in the mail fast--ideally within 48 hours of receiving the donation.

Make it personal. Address the letter to the donor, using correct spelling and their first name.

Tell stories. Either tell one story in detail, or tell short details about multiple people. Either way, connect the donor with the real-life beneficiaries of his/her donation.

Consider including an invitation to visit your organisation and see your work first-hand.

Thank you letters to donors create a lasting bond that will bring in funds year after year. Reconnect the donor with your mission, mention your specific programs, and restate the need. Let the donor know just what his or her donation did, the results it made possible. (See sample letter below.)

Consider creating a Thank You video message. They can be funny, sweet, or pull the heartstrings. When done well, they can be meaningful and memorable expressions of gratitude. If they remember your gratitude, they might be more willing to donate again.

Have a real person sign the letter.

If possible, include a personal, hand-written note.

Some letters use bullet-points to outline the achievements through donations.

Add a P.S. and contact info. Most of us skim a letter, read the P.S. first, and then go back and read the body of the letter. So make your P.S. work for you.



Sample Thank You Letter

Dear Frank and Louise,

This week, thanks to your help, we moved Tom and Francis, a senior couple in their 80s, into a bright, well-furnished apartment in a community devoted to the health and happiness of our older citizens.

No longer isolated in a hard-to-reach walkup in a high-rise building, Tom and Francis now have easy access to the services they need. Plus, they will receive two meals a day and participate in healthy and fun activities ranging from exercise classes to community field trips.

Thank you for your thoughtful donation of \$250 to the Wildthorne County Agency on Aging. Your donation will make sure that older people in our county, such as Tom and Francis, thrive.

As you know, more than 30 percent of our seniors live on small, fixed incomes. The Agency on Aging provides meals, rent subsidies, counseling, recreation, and health care for many of them.

Because of you we can keep helping older people in distress. Donations from caring people like you help us make up for cuts in our state and local government funding.

Truthfully, we could not do this without you. We, and those we serve, deeply appreciate your generosity.

Sincerely,

Merry Baker
Development Director

P.S. Please call me at any time at xxxxx if you have questions, would like an update on what we're doing, or wish to volunteer at one of our sites. We would love to meet you in person so we can say thanks face-to-face.



Sample Thank You Letter

Dear Deborah,

Thanks to you, Michael and his sister, Janet, celebrated Michael's 9th birthday with cake and balloons in a safe and loving place. They are no longer scared and love having their very own rooms.

Thank you for your recent generous gift of \$100 to Children's Residential Services of Greater Boston. Your willingness to help displaced children in our community weather the crises in their lives makes all the difference for children just like Michael and Janet.

Thanks to you, we have provided 250 children just this year with a place to live, learn, and feel safe.

Your donation will help purchase new computers for our kids over the next six months. The children are eager for the new computers so that they can do their homework and communicate with friends and family.

The computers are part of our Excellence in Service Campaign that will make our home even nicer for Michael, Janet, and their new friends. You and other people like you have brought us closer to our goal of \$50,000 for that campaign.

We would love to give you a tour so you can meet some of the 15 staff and 50 children who are now with us. We love to show off our comfy home, and the children enjoy meeting visitors. One or two might even show you what they can do with their new computers.

Janet Teebs, our development director, is always available to set up a visit for you, or to answer any questions you may have. Don't hesitate to call her at 520-446-0912, or email her at janetteebbs@CRS.com. We would love to keep you in the loop with our emails and newsletter. You can sign up for those at our site, www.crc.org.

Again, thank you for all you do for our kids. You are a part of their lives too.

Sincerely,
Malcolm Wexter
Executive Director

P.S. We depend on volunteers to help us. If you would like to share your time, just let Janet know, and she will ask our volunteer coordinator to get in touch. We have frequent introductions to our work for volunteers. We would be delighted to see you there.



Sample Thank You Letter

NonProfitMarketingGuide.com uses some sample Thank You letters. Author Kivi Leroux Miller likes this one

for its unconventional video Thank You message.



Dear Kivi Leroux Miller,

This year as part of our online community, you've been an important partner helping to protect [vital habitats here in North Carolina](#) and around the world.

It's not just me who wants to share sincere appreciation for all you do – [our scientists and field staff thank you too!](#)

Please take a moment to [watch this video and accept our thanks](#) for your steadfast support of The Nature Conservancy.

Look no further than places like the coasts of Albemarle Peninsula and the plains of Onslow Bight and you can see the tangible impact of your commitment.

[I hope you enjoy this short video](#) and are inspired to share it and your passion for conservation by posting it on [Facebook](#), [Twitter](#) or by forwarding this e-mail to family and friends.

Please know we are truly thankful and proud of the conservation progress you've helped make possible this year. For instance, we planted 11,500 bald cypress, 2,000 black gum and 6,750 pond pines in the Alligator River National Wildlife Refuge on the Albemarle Peninsula. We also built 400 feet of oyster reef to provide a natural buffer for the projected increase of nor'easters and hurricanes associated with climate change.



Please watch this video and accept our thanks for your steadfast support this year.

[Watch Video >>](#)

<http://www.nonprofitmarketingguide.com/blog/2011/02/02/non-profit-thank-you-letters-3-i-love/>

Click on the link below to see the thank you video message.

[Thank You From Our Scientists](#)

Funding Tips:

First off... Never staple the application paperwork together, they need to photocopy it and you are just making their work harder. Don't put it in a pretty folder just put everything in an A4 envelope and send it.

ONLY EVER USE THE FUNDING FOR THE PURPOSE THE CLUB APPLIED FOR i.e. don't apply for money for boats then use it to get helmets or pay for a course

You are more likely to get funding from organisations that get their funds in our area. For us that is:

- Trust House – Trust House will only fund individuals if they are in a New Zealand team. Otherwise they will only fund club needs
- Prime Community Trust
- Pelorus Trust
- Eastern and Central

Funding organisations are more likely to fund equipment or say safety courses than uniforms or travel

Tell the funding organisation about the club ...What it does, who it works with.

Tell them who will benefit ... Always mention schools and the fact that 95% of people the club works with are under 18 years of age, but make sure to say we also work with the community in general and not just club members. Include pictures of club activities, try to use youth paddlers as opposed to adults in the pictures.

Tell them why you want the thing/s you want Research the options available for whatever you want funded eg if the club needs boats find out what is the boat/s that will do the best job. If it is the dearest option then show them why the club wants that particular one... perhaps it is easier for small people to maneuver, it will last longer or it is more like the boats people will use when they go on to purchase their own. You need to explain why the club wants to take the option it has.

Find a picture/s of the option/s you have taken. You can either use it to compare it with what the club wants to replace to show how sad the club gear is or you can compare it with a cheaper option to help explain why it's the best option.



Tell them what's in it for them. Never ever offer financial gain for them, but tell them you can put a link to their website on our website and that you will mention their funding in any newsletter or club communication. The New Zealand Canoe Polo Assn. will list funding successes in their 3 monthly newsletter if you let them know.

Include copy of

- Charities Commission registration cert,
- Incorporation cert
- Financial records for the last full financial year (with cover letter from whoever checked the books).
- If Common Seal is needed on application it is always with club secretary and must never leave his/her possession.

ALWAYS GO THROUGH THE CHECK LIST ON APPLICATION FORM TO MAKE SURE YOU HAVE DONE EVERYTHING NEEDED

Finalising funding is what needs to be done once club has used the funding for the purpose it was applied for and it should be done as soon as you have a copy of the bank statement showing the money has been used.

When finalizing any funding club has received send

- 1) Any photos of events goods where used in or good in use (stage it if you have to)
- 2) Copy of bank statement with payment for goods highlighted
- 3) Copy of receipt for payment of goods
- 4) You could also include a short report about how the club has benefited from their funding.



Gaming Societies Contact Details for the Gisborne Tairāwhiti Region (as at February 2013)

Gisborne Gaming Societies

First Light Community Foundation

Contact details

Grants Administrator,
Endeavour Community Foundation,
PO Box 242
Napier 4140
P: 06 650 6100 or 0800 363 328
F: 06 650 6101

E: grants@endeavourcommunityfoundation.co.nz

W: www.endeavourcommunityfoundation.co.nz

Criteria, purpose & priorities

Support for projects of benefit to the community

- Only non-profit bodies
- current financial statements of Income and Expenditure and a Balance Sheet, preferably audited, for the previous 12 month period or financial year end
- applying for uniforms, will only be granted funds for those items that specifically enable the recipients to participate in the playing for their respective sports

Closing date – 10th day of every month

First Sovereign Trust Ltd

Contact details

Postal Details

First Sovereign Trust
PO Box 1629
Rotorua

E: admin@firstsovereign.co.nz

W: www.fst.net.nz

P: 07 345 7070

F: 0508 347 787

Criteria, purpose & priorities

CLUBS SPORTS TEAMS

Donations to amateur sport teams and clubs competing in recognised leagues and tournaments.
Provision of actual and reasonable travel expenses for groups participating in tournaments with kindred groups.
Sports Equipment.
Playing uniforms.
Ground Hire.

COMMUNITY

To provide for the maintenance, refurbishment and well being of local marae.
Programs that support youth at risk.



Support services for drug, alcohol and gambling.

Recognised cultural and community organisations to further the objects of those groups.

Schools and other educational institutes for equipment and student amenities for educational advancement not covered by government funding.

Closing date - Check Website

Lion Foundation

Contact details

Head Office:

Private Bag 102 920,

North Shore Mail Centre, Auckland

Free Phone: 0800 802 908

P: (09) 488 7707

F: (09) 488 7747

W: www.lionfoundation.org.nz

E: info@lionfoundation.org.nz

Criteria, purpose & priorities

- Support for projects of benefit to the community.
- Only fund events/projects which take place during the next 6 months
- Not for retrospective activities
- No transactions or costs that are already incurred or pre-paid
- Funding of overseas travel will only be considered for a New Zealand representative group, team or individual who has been chosen in a nationwide selection process
- No departure tax, travel insurance, overseas accommodation or internal travel within an overseas country.

Closing date - Always open

New Zealand Community Trust

Contact details

PO Box 10857,

Wellington 6143

P: 0800 44 69 28

E: info@nzct.org.nz

F: 04 473 0007

W: www.nzct.org.nz

Criteria, purpose & priorities

Support for any charitable, philanthropic, amateur sport, cultural or any project of benefit to the community.

- Grants request must be for future spending
- Not for individuals
- No fundraisers
- For activities or items that would not be possible without additional grant funding
- For organisation's main priorities

Closing date -15th of each month



Pub Charity Inc

Contact details

Freepost 956,
P.O Box 27-009, Wellington
P: 0800 42 64 64
W: www.pubcharity.org.nz

Criteria, purpose & priorities

Support for any charitable, non-profit, philanthropic, cultural or party political purpose of benefit to the community

- Applicants must have a bank account with the name of the club

Closing date - Check website

Transpower Community Care Fund

Contact details

Transpower CommunityCare Fund
Corporate Relations
Transpower New Zealand Ltd
PO Box 1021
Wellington 6140
P: 04 590 7005
E: communitycare@transpower.co.nz
W: www.transpower.co.nz

Criteria, purpose & priorities

Any independent, local, non-profit organisation or community group, non-government organisation, charity, school or educational institution, iwi or regional or district council can apply.

The fund is available to all regions throughout New Zealand affected by Transpower assets.

The CommunityCare Fund makes one-off grants for a minimum of \$5,000 or a maximum of \$50,000.

Closing date - 31 January & 31 July each year

Gisborne Funding Providers

COGS (Community Organisation Grants Scheme)

Contact details

Audine Grace-Kutia
Community Development Group,
Department of Internal Affairs,
Level 2 Wilson James Centre,
77 Peel Street, Gisborne
P: (06) 868 1915
F: (06) 868 1964
W: www.dia.govt.nz

Criteria, purpose & priorities

For groups providing essential social services to priority sectors in their local communities Must be incorporated or charitable trust or under umbrella of organisation that fits criteria.

Closing date Only one round per year 29 July



Eastern & Central Community Trust

Contact details

PO Box 1058
Hastings 4156
P: 0800 878 720
F: 06 878 9550
E: bev@ecct.org.nz
W: www.ecct.org.nz

Criteria, purpose & priorities

For established community, non-profit groups with a charitable purpose

Closing date On website

Eastland Community Trust

Contact details

P O Box 800, Gisborne 4040
260 Gladstone Road, Gisborne 4010
Contact – Yvonne Berry
P:(06) 869 0884
E: office@ect.org.nz

Criteria, purpose & priorities

Sponsorship up to maximum of \$5,000 or projects which have economic benefit to the community – eligible for amounts over \$5,000.

Closing date Discuss with funder

J & T Hickey Charitable Trust

Contact details

C/- W C Peach and Associates
P O Box 480, Gisborne
P: (06) 867 0193

Criteria, purpose & priorities

New facility development for non-profit entities, not for operational expenses.

Closing date Check with funder

JN Williams Memorial Trust and various other Trust

Contact details

BDO Spicers,
PO Box 169, Gisborne
P:(06) 868 5069
F:(06) 8678533

Criteria, purpose & priorities

Discuss with funder

Closing date Check with funder



Sport Gisborne encourages you to explore all channels for funding acknowledging that this list will not cover all opportunities available.

Details compiled on 17/01/2013

Sponsorship

The collective marketing budget of New Zealand businesses is large and their use of sponsorship as a marketing tool is growing. Sports organisations have an abundance of properties with sponsorship potential and some generate substantial revenues from these sources. Many do not, however, and few take a strategic approach to sponsorship, relying instead on contacts and 'inside' information. Major sponsors are becoming increasingly sophisticated and more demanding in terms of the return on investment they seek from their sponsorship. Some receive thousands of proposals each year and only those that capture their attention and offer real value are even looked at.

Sponsorship is not just about money. A good sponsor can add considerable value by, for example, becoming the sport's primary advertiser and creating great brand exposure. In the longer term, this benefit may be of more value than the direct sponsorship income initially received. Good sponsorship requires significant investment from both parties. The sponsor is required to contribute monetary resources and support leverage activity. The sports organisation, in turn, is required to provide the structures, systems and product to ensure good value is received by the sponsor.

Three key ideas to remember:

1. Sponsorship is the selling of a product (the property) to a customer (the sponsor).
2. The customer has choice – sponsorship is only one of a range of marketing tools for the customer to invest in.
3. Responsibility for the success of a sponsorship lies with the sports club / team.

Sponsors need generally lies within one or more of the following areas:

Support for brand position: A fast-food chain sponsors key athletes to support the new brand offering of healthy alternatives in the menu.

Exposure of brand: A phone company sponsors a high-profile sport to achieve higher television exposure of their brand.

Increased access to target audience: A finance company sponsors a sport because the demographics of the sport match their target audience and the sport provides opportunities to interact with that demographic.

Sponsor target market identification process:

Carefully identifying your target market for potential sponsors will minimise time wastage and ensure potential sponsors are not overlooked. There can be a temptation to look at only current contacts or high-profile organisations. This can limit the potential of sponsorship and should be avoided by following the identification process outlined below:

1. **Develop a list of businesses of suitable size and profile operating within your region.**
2. **Revise the list to include businesses which use sponsorship as part of their marketing plan (or have recently done so).**
3. **Estimate the value of your product.**
4. **Revise the list to include only businesses who can afford the sponsorship you require (the shortlist).**
5. **Research the businesses.**

Result: A list of businesses involved in your region who use sponsorship and can afford the product.



Hints:

- Contacts are better than cold-calls. Use your member network to find specific contacts within local and national companies
- Invitations to a sporting event with corporate hospitality can work well
- Slow but steady relationship-building creates an environment where information can flow freely
- A complete unwillingness to meet or share information may help determine where they sit on your priority list as a target

Sponsorship Proposal:

The size and professionalism of the proposal should be indicative of the sponsorship itself (e.g. the proposal for a sponsorship which is worth \$5,000 may take the form of a letter, while the proposal for a sponsorship which is worth \$100,000 may take the form of a glossy brochure). No matter what size your sponsorship is, a sponsorship proposal should always be written.

Every proposal should have the following components:

- 1. Introduction:** Introduce the Club / Organisation.
- 2. Introduction to the product:** Introduce the product i.e. the event, the programme, the team, etc.
- 3. Key attributes of the product:** Provide particulars of when, how often, where, how many, etc.
- 4. How the product will meet their needs:** Detail the specific sponsor needs that will be met and how they will be met e.g. media coverage, contact with consumers, structures in place for their use, platforms for their communication, etc.
- 5. Specifics of the sponsorship:** Specify the sponsorship offer and detail the sponsorship package offered.
- 6. The cost:** All costs associated with sponsorship, the sponsorship fee the amount of money the sponsor will pay, include such things as signage costs, logo costs, etc.
- 7. How to move forward:** A clear plan for moving forward if the potential sponsor is interested in doing that.

Servicing the Sponsor:

Servicing the sponsor is the process of ensuring the product provides everything it promised to provide. This is a critical step in ensuring sponsor satisfaction and an enduring relationship.

Keys to successful sponsor servicing:

1. Ensure you get 'the sell' right.

Sponsor servicing starts before the contract is signed. It involves ensuring that all the assumptions, promises and objectives are clearly articulated and thoroughly understood.

2. Plan with your sponsor.

In conjunction with the sponsor, create a timeline, roles and responsibilities for how and when each element of the sponsorship will be fulfilled and achieved.

3. Constantly communicate with your sponsor.

At every stage of the timeline, ensure the sponsor clearly understands who is doing what and when.

4. Facilitate the planning of all the sponsor's leveraging activities.

The sponsor's leverage activity is as important to the success of the sponsorship as the sponsored product itself.

5. Constantly report to the sponsor.

As each element is fulfilled, provide a complete accounting for that fulfilment to the sponsor.



6. Over-deliver on every element of the contract.

7. Discuss the product's performance.

Whether a programme or a team, discuss with the sponsor how they are performing, their future prospects and what is in place to achieve continued improvement in performance.

8. Protect your sponsor from ambush marketing.

If it is at all within your power to prevent a competitor from marketing their products around your property, do so. Communicate vigorously with your sponsor on your efforts and always keep them up to date with any competitor activity.

9. Provide thorough post-analysis, while planning for the future.

In report form, document how each element of the contract was fulfilled and to what extent. Constantly keep in mind that it is far easier to keep a current sponsor than it is to find a new one.



SPONSORSHIP CONTRACT TEMPLATE

AGREEMENT TO BE A SPONSOR OF: *(Event or Project Name)*

PARTIES:

This agreement is between *(Your Organisation)* (the "Event Organiser"), and *(Business Name)*, (the "Sponsor").

1. Agreement Term and Coverage

- (a) This agreement relates to the *(Event or Project Name)* to be held on *(date)*.
- (b) This agreement gives the Sponsor the first right of refusal for involvement in the *(Event of Project Name)* for _____ years.

* State if any exclusivity rights apply to this contract.

2. Obligations of the Event Organiser

The Event Organiser will:

- (a) Include the Sponsor's company logo on:
 - A. _____
 - B. _____
 - C. _____
 - D. _____

- (b) Display ___ of the Sponsor's company banners at:

- A. _____
- B. _____
- C. _____

- (c) Mention the Sponsor's company _____ times at the event.

- (d) Provide the Sponsor with ___ complimentary tickets to the event.

3. Obligations of the Sponsor

The Sponsor will:

- (a) Provide their company logo in an approved format for use in advertising, as indicated above.
- (b) Provide contact details and a thirty word description to use in promotional material where possible.
- (c) Where requested, make themselves available for promotional photographs or interviews.



Annual Legal Requirements

This is dependent on the legal status of your club/group. Remember to include this cost in your annual budget

Audits:

During an audit, a person independent of the club such as an accountant, checks that the financial statements are a correct record of the financial position of the club at the time of the audit.

A suitably qualified volunteer can look at the club's accounts, or it may be necessary to use a professional auditing service. This can be costly so finding a volunteer who is willing to perform the audit is preferable.

Auditing can be a lengthy process and it is a good idea to allow six to eight weeks for an audit to be completed. Your club's auditor will need:

- the club's cashbooks, written up and balanced for the year, and journals or ledgers that the club uses for records
- bank statements for the whole year
- copies of deposit slips and cheque butts
- receipt books with duplicate and original copies plus any unused receipt books
- vouchers for payments made by the club, arranged in numerical order
- receipts or copies of cheques paid to your club
- copies of minutes from your management meetings that show how financial decisions were made and agreed
- copies of any previous audit statements
- all financial statements for the year being audited
- any other relevant financial documents

