NOOSA COUNCIL

Treasurer's Meet-up and Workshop

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Ask Any Time!

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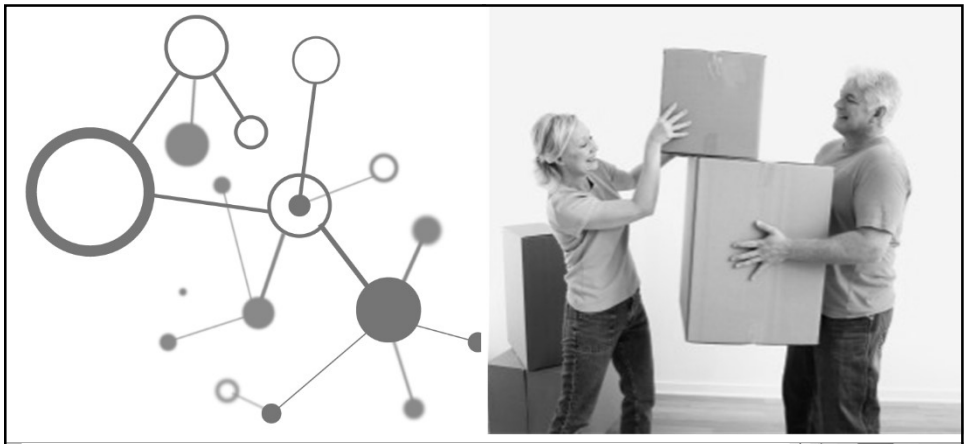
3 Basics Of Finances

Financial Monitoring	• Reporting • Auditing • Taxation Reporting
Financial Performance	• Increasing Income • Decreasing Expenses
Financial Planning	• Budgeting • Investment Strategies

Legal Aspects Of Club Money



The Cardboard Box

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Profit For Purpose

- Increasing changes to the NFP business environment and even more to come (ACNC)
- Volunteer status doesn't protect you from failing to abide by relevant legislation
- Non profit doesn't mean you shouldn't make one
- Good committees understand they need to ensure the future of the business
- Volunteers need to consider where they are best suited to volunteer
- Too much focus on operations to the detriment of strategy

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Who's Money Is It Anyway?

Your Committee responsibilities in managing finances.

Corporations Law

- Duty to act in the interest of the members, so should operate independently and free from influence
- Act in good faith
- Exercise due care & diligence
- Ensure solvency

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Methods of Incorporation

- Incorporation
  - Incorporated Association
  - **Unincorporated Association*****
  - Company Limited by Guarantee or With Shares (ASIC)
  - **Charitable Trust*****
  - Co-operative
  - Special Act of Parliament or Letters of Patent
  - Union of Employers or Employees
  - Church or Religious Group
  - Indigenous Group

Who's Money Is It Anyway?

Your Committee responsibilities in managing finances.

Associations Incorporation Act (Queensland)

- Ensure all documents show Association's name, including internal documents (Sec 32)
- Have a bank account and Keep all property in the club's name (Sec 24)
- Obtain public liability insurance (Sec 70)
- Present financial reports according to level (Reg 9 & Sec 59)
- Control the Business and operations (Sec 60)
- Ensure financials are submitted to members at the AGM (Sec 59)

Level Details	Audit Requirements	Insurance Requirements
Level 1 Turnover or Assets Over $100,000 per annum	Full Audit To The AIA	Must have public liability insurance Must advertise level of insurance
Level 2 Turnover or Assets Between $20,000 and $100,000 per annum	Accountant to confirm accounts (not full audit)	May choose not to have public liability Must advertise level of insurance
Level 3 Turnover or Assets Under $20,000 per annum	Treasurer's Statement only (check with your organisation first)	May choose not to have public liability Must advertise level of insurance

Incorporated Association Levels (After 15 June, 2007)

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Insurance, Risk & Disaster

- Affiliation
  - Could only include participant cover
  - Usual excess on claim $5,000
- Public Liability
  - May be required by Incorporation (Level?)
- Association Liability
  - May be included in affiliation **Check!
- Volunteers
  - May not be covered by affiliation or insurance, even if affiliated
- Assets
  - Some council's self insure, find out how the assets you use are protected
- Risk
  - Formal risk assessment is vital for every day operations & disasters
- Disaster Recovery
  - Recent events prove a great club will have a disaster recovery plan and disaster mitigation plan!

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Its Not Just The Treasurer's Job

We know the organisation is fine financially, besides we have the books audited, it not our responsibility…

…that's up to the Treasurer

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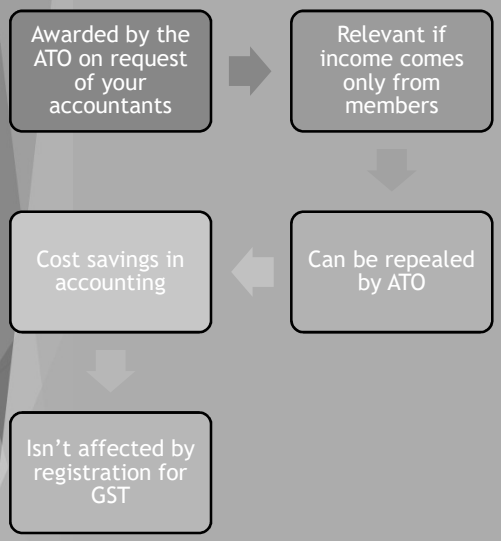
Tax Free Status



Registering For GST

- Speak to your accountants
- Ask the ATO for advice
- Effects on fundraising
- Check out the website for non profit organisations:
- http://www.ato.gov.au/nonprofit/

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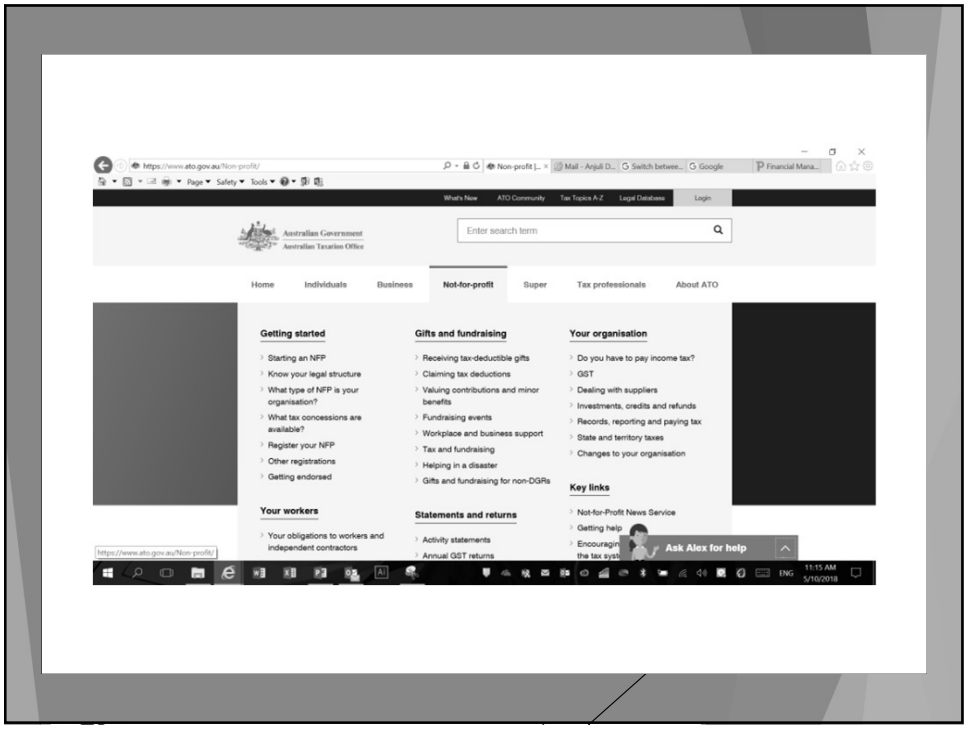
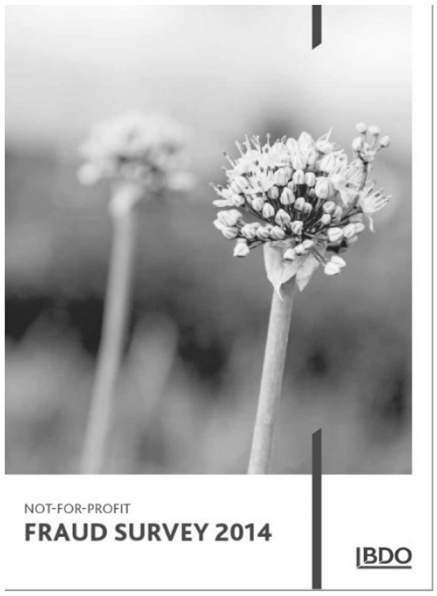


Financial Monitoring & Reporting



Why is all of this important?

Sentenced to 18 months jail for stealing almost $100,000

How high stakes fraud

Exclusive: Former Keep Australia Beautiful CEO convicted of swindling

David Barwell

SPENDING SPREE

THE HOLIDAY

THE RACES

Why is all of this important?

The inquiry heard evidence that former president Don Rowe spent $475,000 on a corporate credit card over a six-year period, including $213,000 in cash withdrawals.

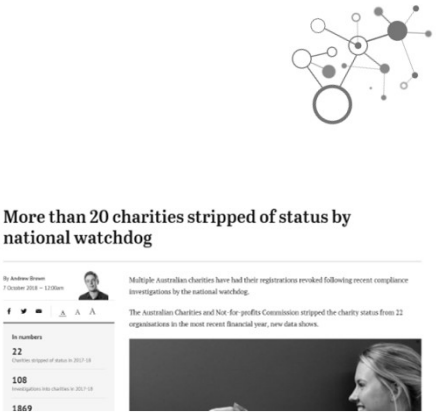
Former RSL NSW president Don Rowe admits to public inquiry he misused charity money

PM, By Angela Lavoipierre

Updated 19 Sep 2017, 12:10am

Why is all of this important?

The most common categories of concern related to fraud and financial mismanagement, including poor financial controls, inadequate due-diligence of employees and partners and a failure by the charity's responsible persons to act in the best interest of the charity…


More than 20 charities stripped of status by national watchdog

By Andrew Brown

7 October 2018 — 12:00am

Multiple Australian charities have had their registrations revoked following recent compliance investigations by the national watchdog.

The Australian Charities and Not-for-profits Commission stripped the charity status from 22 organisations in the most recent financial year, new data shows.

In numbers

22

108

1869

How Much & By Who?

- A total of $1,071,851 of fraud was suffered by organisations, surveyed representing an average of $14,291 per fraud in 2010 (Extrapolates to over $1B per annum)
- 36% of organisations in the development & housing category suffered fraud
- The largest number of frauds occurred in the Social Services grouping
- The most common type of fraud reported was cash theft (24%)
- The average duration of the fraud was ten months.

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Responding

- The majority of respondents did not report the fraud to police
- 36% of organisations did not terminate the employment of the person who committed the fraud
- 67% of organisations that suffered fraud did not recover any of the funds from the perpetrator

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Recording Transactions

Use	Use either computerised or manual system
Cash	Cash book to record payments & banking
Produce	Produce a profit & loss each month to show performance
Record	Carefully record what you owe & what people owe you
Use	Use Year To Date reporting
Make	Make sure new purchases are added to the asset register if necessary
Keep	Keep a "loan out" register of who has what equipment, uniforms etc
Get	Get volunteers to sign a list of what they have
Prepare	Prepare a policy on use of club resources

Cash V Accrual

Accrual shows transaction that haven't happened yet

- Purchase orders, rather than cash buying
- Pre payments, for money received that won't be expended until the following year
- Invoices for things that have been taken or sold but not paid for yet.

Cash shows each transaction only as it occurs

- Great for small associations and clubs
- Best option if you don't use debtors & creditors

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Treasurer's Job Description

- Maintain working level of petty cash
- Ensure money is receiving & promptly banked
- Invoice members, uniforms etc
- Prepare budgets
- Present monthly reports
- Prepare annual audit documents & liaise with accountants
- Maintain accurate records
- Be the signatory on club cheques
- File tax returns if required
- Manage club investment programs
- Arrange for necessary insurances

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Income

- Anything that earns money
  - Memberships
  - Game Fees
  - Canteen
  - Equipment Sales
  - Insurance
  - Membership Benefits
  - Other ?????

Expenses

- Insurance
- Maintenance
- Food & Beverage
- Telephone
- Postage
- Fees

Monthly Financial Reports

- At least original bank statement & cash book report
- Best option
  - Profit & Loss Year to Date Vs Budget
  - Balance Sheet
  - Outstanding Debtors
  - Outstanding Creditors
  - Bank Reconciliation
  - Cash Flow

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Your Audit

Understanding Your Audit

- Some clubs must be audited every year (Sec 59)
- Auditor should be appointed or confirmed every year at AGM
- Exclusions of Persons Who Can Audit (Sec 59 (2))
  - Member of committee
  - Employee of the club
  - Partner, employer or employee of the secretary or another member of the management committee
- Audit reports must be lodged within 30 days of adoption unless exempted by FTO.
- Auditor should provide an engagement letter prior to commencement.

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What's In Your Audit

Statement of Income & Expenditure shows if your club made a profit or loss during the year

Statement of Assets & Liabilities (Balance Sheet) shows if how much your club owes and how much other people owe the club & value of everything you own

General Ledger shows reports of all transactions during the year

Asset Register shows everything you own

Documents Required For Audit

- Receipt Book
- Receipt Book Register
- Bank Deposit Book
- Cheque Book
- Cash Book
- Wages Book (if required)
- Petty Cash Book
- Asset Register
- Minutes
- Register of Members
- Copies of invoices to and from the club
- Petty Cash vouchers & summary
- Payroll details
- Investment details showing interest payments
- Asset register
- Accounts receivable & payable
- Details of any other liabilities, leases, loans etc
- Stock take list for canteen and any items the club has for sale

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Understanding For Your Audit

- Qualified Audit
  - Except For: auditor disagrees with committee on accounting policies but doesn't warrant adverse opinion.
  - Adverse: when effects of disagreement are material and there is misleading or incomplete information
  - Disclaimer: limitation is so material the auditor is unable to express an opinion.

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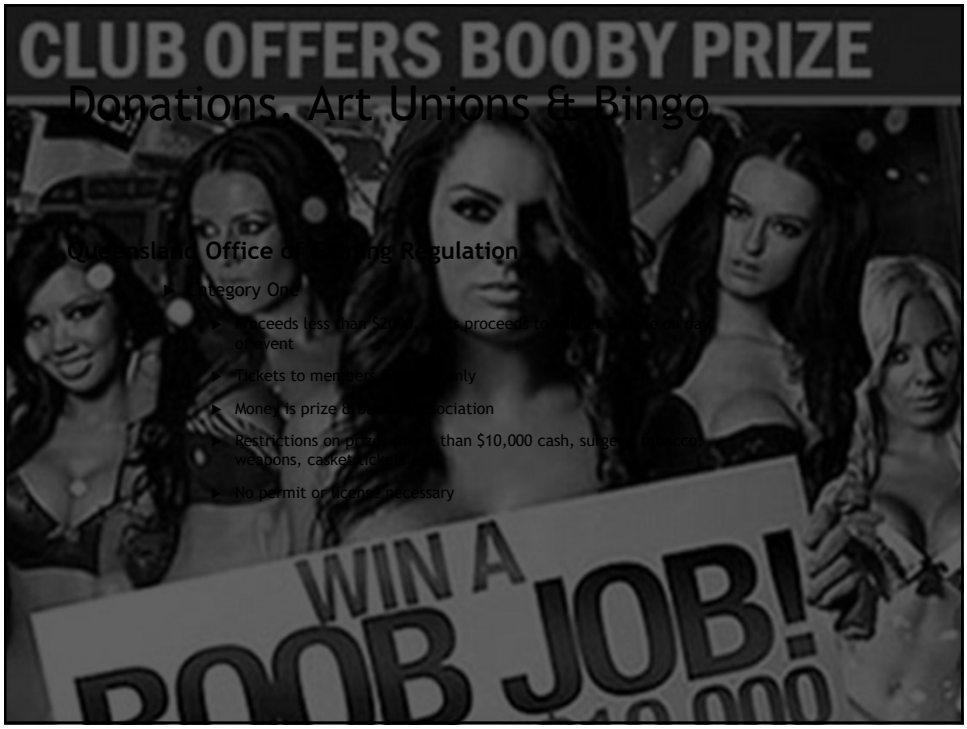
Getting Money



Donations, Art Unions & Bingo

- Queensland Office of Gaming Regulation
  - Category One
    - Proceeds less than $2[illegible] proceeds to [illegible] day of event
    - Tickets to members & guests only
    - Money is prize & back to association
    - Restrictions on prizes (more than $10,000 cash, surgery, tobacco, weapons, casket tickets etc)
    - No permit or licence necessary

- Queensland Office of Gaming Regulation
  - Category Two
    - Proceeds less than $20,000, gross proceeds to winner & done on day of event
    - Tickets to members & guests only
    - Money is prize & back to association
    - Restrictions on prizes (more than $10,000 cash, surgery, tobacco, weapons, casket tickets etc)
    - Permit required

  Category Four is for no charge promotions & competitions but still has conditions

Donations, Art Unions & Bingo

Sponsorship

- Start planning and approaching sponsors 12 months before you need the money as decisions take time.
- Its as easy to ask for large amounts as small.
- Focus on what's in it for the sponsor and how their businesses will benefit (Return On Investment ROI)
- Try and find out what your sponsor's objectives are and show them how sponsorship will address them.
- Keep a sharp eye on the long term - build trust over time.
- Use your time effectively, this takes persistence
- Don't let a month pass without contact via phone or email
- Never endorse anything a sponsor sells or makes.
- Make sure you have a written agreement highlighting exactly what you are agreeing to.
- Ensure you meet your obligations.

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How To Keep Sponsors

Managing The Sponsor Relationship

- The relationship with your Sponsor is based on the delivery of your promises.
- Keep in touch and keep them up to date.
- The job isn't over when the cheque arrives or event is done
- Give great service and they'll come back.
- Do more than they expect, give more than they wanted.
- Be early on delivery, prompt on contact returns and emails and flexible on their dates
- Have a plan for deliverables to ensure fulfillment. Don't over promise and not deliver.

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Sponsor Agreements

- A Contract doesn't have to be complicated, just legal.
- Should include what they will do for you (amount of sponsorship) and what the club agrees to do for them.
- Include their Sponsorship Title and cash or in kind value.
- Include their benefits and your deliverables including due by dates.
- Include the start and finish date of contract.

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Appreciation & Follow Up

Send	Send emails and include sponsors activities & logos on website.
Take	Take lots of photos of sponsored activities and send them on to sponsor.
Consider	Consider putting together a book of photos and comments from members about sponsorship activity.
Send	Send cards & letters of thanks.
Invite	Invite the sponsors to attend any activity you are planning, even if they don't come, they will appreciate the invitation.

Funding Myths

- Someone is giving out free money.
- They owe us, we pay tax.
- Funding will help pay our operational costs.
- The funding body has lots of money.
- My project is important & unique.

Your Application Is A Job Interview

- Funding isn't free money, there will be a cost in labour & management
- Why would someone pay to subsidise the costs of running your club
- Your project is special & unique … and so is everyone else's.
- The grant provider needs to see a return on their investment for you to be successful.

Description	2009-10	2010-11	2011-12	2012-13	2013-14
Club Members					
Media Publicity					
Competitors/Performers					
Volunteers					
Income					
Expenditure					
Profit					
Facebook followers/website hits					
Merchandise					
Economic Impact (spend)					

Track trends over time

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Prepare Your Arguments

- Develop some surveys to ask members & community questions
  - www.surveymonkey.com
  - Simple suggestion box
  - Emails etc
- Consider doing even a one page strategic plan and include identified needs to support your applications

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Do Some Risk Management

Colour coding helps you to see the high risk areas or 'red flags' that require active management.

Likelihood	Consequence		
	High	Medium	Low
Likely	Severe	Major	Major
Possible	Severe	Major	Minor
Unlikely	Major	Minor	Minor

■ Red = high risk, which needs to be actively managed ■ Amber = risk needs monitoring as required.
■ Green = the lowest risk, which requires only minimal monitoring.

Example Risk Matrix

Risk	Likelihood	Consequence	Mitigation Strategy
Project runs over budget	Possible	Medium	Regular tracking of expenditure against budget line items.
Project manager/coordinator leaves	Possible	Medium	Succession planning; multiple group members understand and can continue the project.
Lack of volunteers	Possible	Medium	Maximise use of recruitment networks; ensure volunteers feel connected and have an enjoyable and meaningful experience.
Volunteers / staff are injured on project	Possible	High	Ensure staff/volunteer induction includes safety briefing, etc. confirm insurances are up to date and have appropriate coverage.

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Sustainability

- ▶Long term viability is important to funding bodies.
- ▶After the grant monies have gone how will you keep going if it's a new initiative?
- ▶Prepare a succession plan

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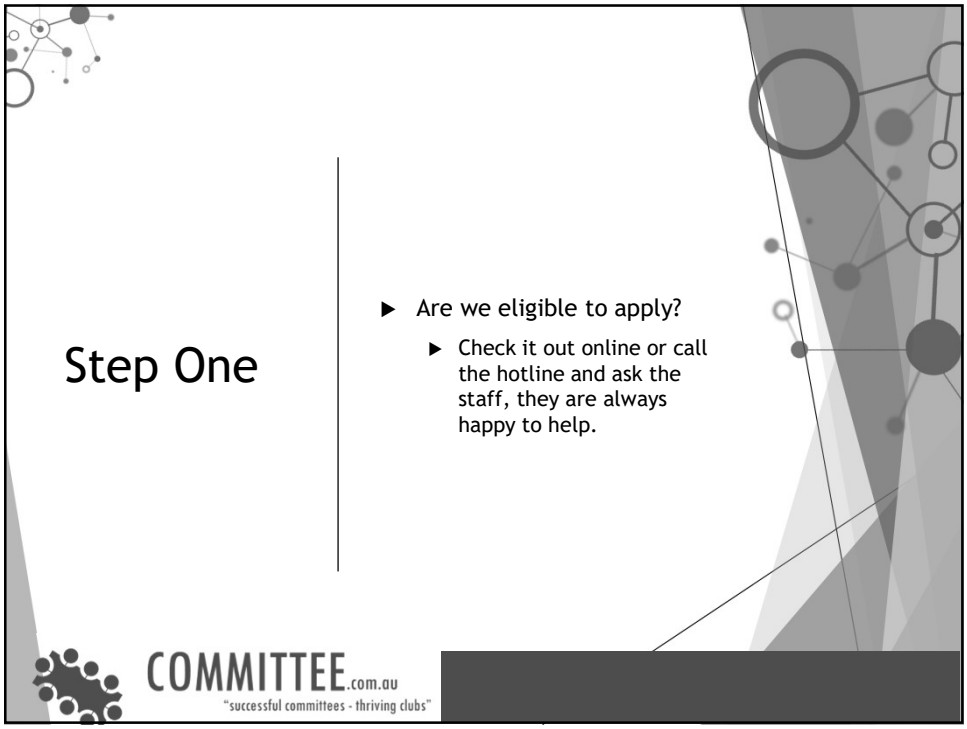
Step One
Are we eligible to apply?
Check it out online or call the hotline and ask the staff, they are always happy to help.
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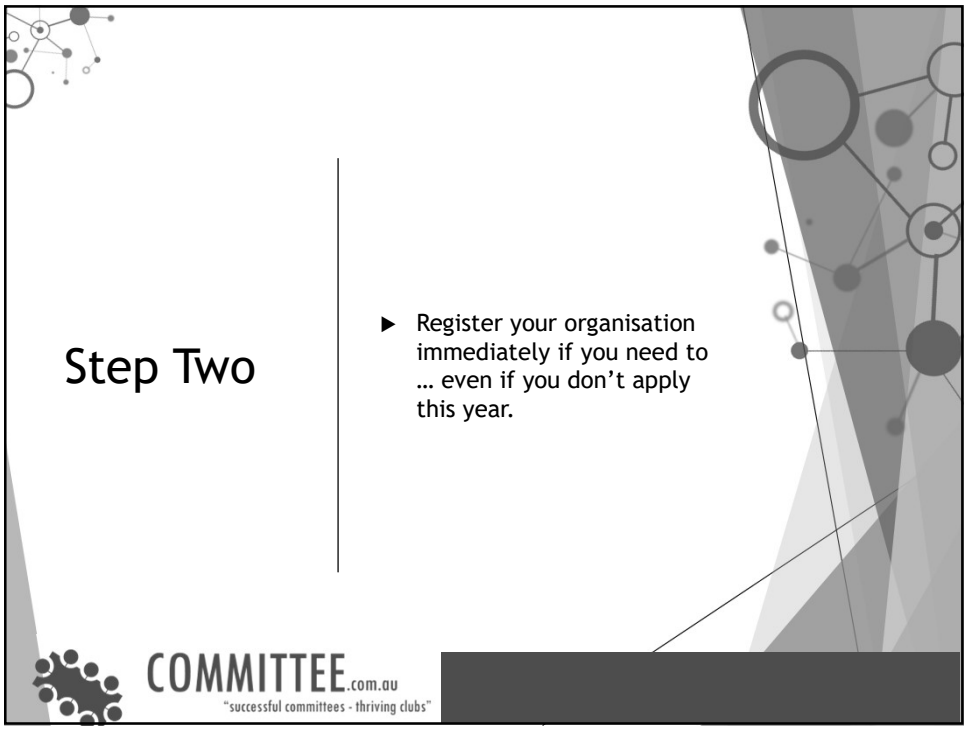
Step Two
Register your organisation immediately if you need to … even if you don't apply this year.
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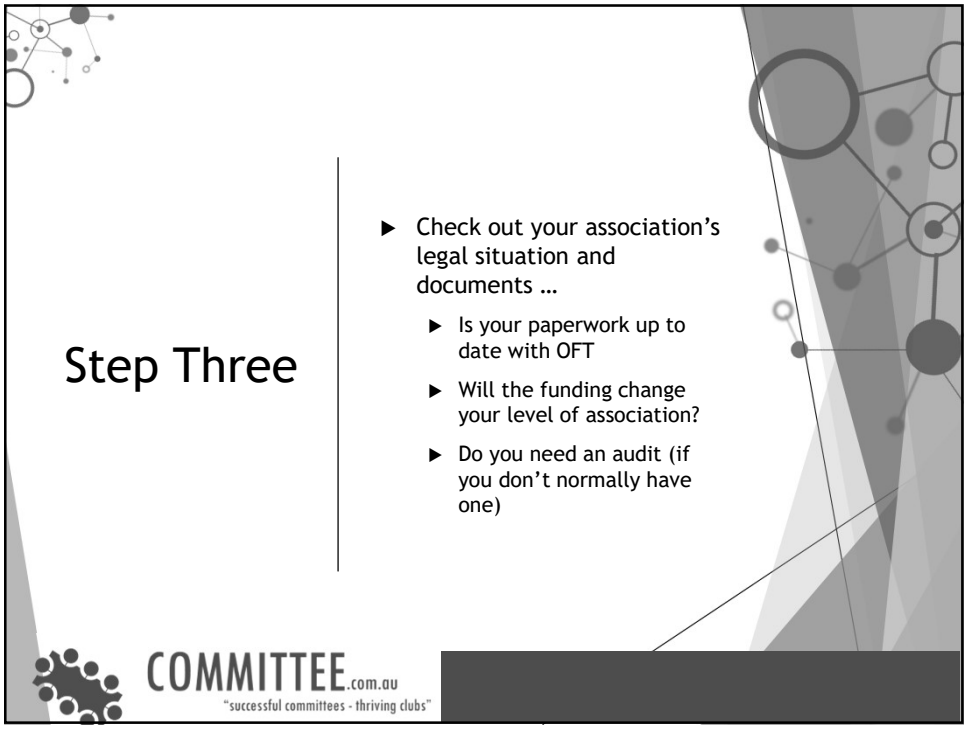
Step Three
Check out your association's legal situation and documents …
Is your paperwork up to date with OFT
Will the funding change your level of association?
Do you need an audit (if you don't normally have one)
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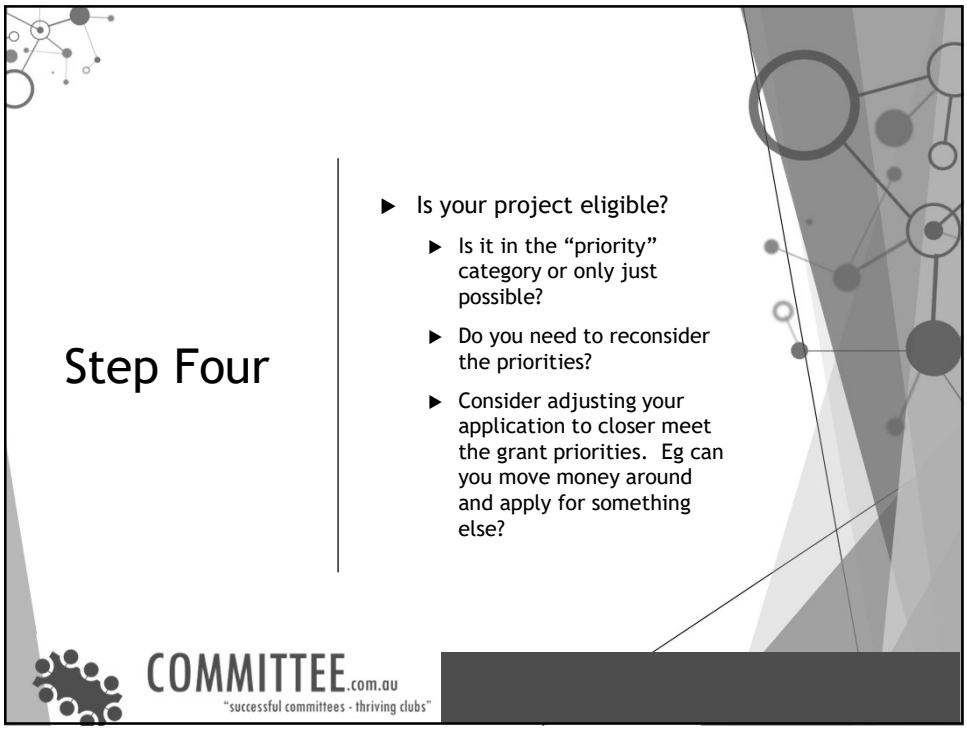
Step Four
Is your project eligible?
Is it in the "priority" category or only just possible?
Do you need to reconsider the priorities?
Consider adjusting your application to closer meet the grant priorities. Eg can you move money around and apply for something else?
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What Are You Really Trying To Achieve?

Are you applying for lighting? Or trying to get more working women into sport?

Do you want a photocopier? Or do you need marketing expenses to increase participation?

Are you wanting to sponsor a local artist? Or are you trying to increase tourism dollars coming into your rural community?

Step Five

- Prepare draft letters of support for the project.
- Put together a one page outline of the project and send to stakeholders when asking for their support.
- Meet with funding staff or talk to them on the phone as you work through the application.

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Actions (how) - what needs to be done to achieve the objectives? An example of an action to achieve the objective of doubling the number of junior players might be, "to produce a promotional brochure for distribution to local schools and hold a participation event at the school fete to showcase the club and sign new junior players".Action	Start Dates - what is a realistic time flow for each step of the project. Remember to allow some room in case things are delayed to make sure the project is completed in time. List every individual step to show you've thought of everything.	Responsibilities (who) - who is responsible for completing the actions? Are they accredited and do they hold a valid blue card to deliver the activities or project?	Resources (what) - how much is it going to cost? Are you getting value for money? Have you gone to the market place to explore costs and do you have quotes to support your application? Will you have in-kind support from club volunteers and other community organisations?	Timeframes (when) - when do the actions need to be completed? Does the school fete and start of junior season align?	Monitoring and reporting - Who is going to monitor and report on the project? Are you monitoring the change from before the event and after? Have you set key milestones to monitor the project, e.g. regular meetings?

The Action Plan

Do's

- Stick to guidelines eg. template, font, folders
- Treat the grant staff like a trusted friend
- Find your unique selling point and do it quickly, right at the beginning of the project description
- Include what real life benefits the project will deliver
- Back up your claims with statistics that are sourced …"we have the best service" is better written as "according to our annual member survey in 2011/12, 80% of our members rated us as having either good or very good service" (see Appendix 2 for survey results)

Wha

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Don'ts

- Use endless words … keep it brief & succinct
- Only use words .. Include pictures, tables & graphs as well
- Forget to include ALL the requirements listed in the applications ..use the checklist or make one
- Leave any blanks!

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The Funding Budget

Make sure you include all possible costs eg. insurance, audit fees, bank fees.

Value of in-kind support eg. $19 an hour volunteers or according to the allowable guidelines of the grant (some are specific)

Don't just say admin or travel – break down and *justify*.

Include brief, appropriate support documentation eg. audited financial statements, business plans, quotes, CVs, monitoring process, evidence, evidence, evidence

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Do A Funding Budget

	$	$	$
Engineering Plan	10,000	20,000	30,000
Foundations	12,000	12,000	24,000
Construction	50,000	50,000	100,000
Fittings/lighting	5,000	5,000	10,000
Site Manager/Logistics	----	15,000	15,000
Project consultant	10,000	10,000	20,000
Signage	8,000	10,000	18,000
Media Launch	1,000	1,000	2,000
Administration (office space/travel/telecommunications)	4,000	5,000	9,000

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Check Your Application

- Use the right language for the grant (professional, casual etc)
- Proof read it as many times and using as many people as you can.

TRADE SECRETS FOR WRITING

- Ask someone from outside the club to read it and see if they know what you are asking for.
- Be convincing and show you are professional and capable.

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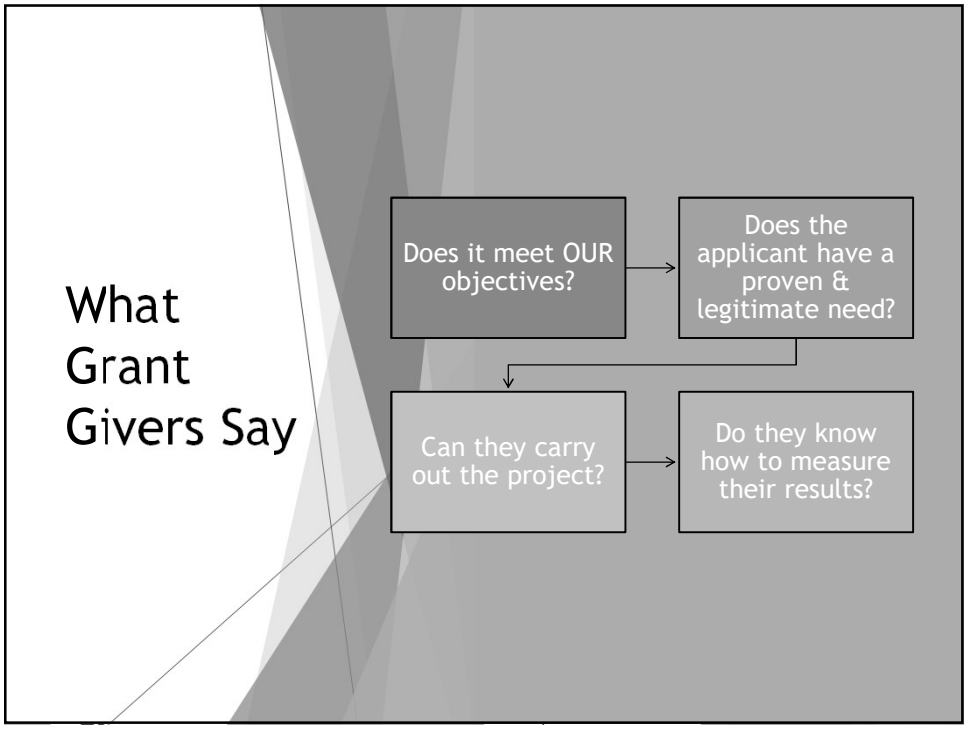


Queensland Government
Department of National Parks, Recreation, Sport and Racing

http://nprsr.qld.gov.au/funding/overview/index.html

Get in the Game - *Get Going*—now open

Get Going supports local sport and recreation organisations with funding of up to $10,000 for projects that create opportunities for more Queenslanders to become members.

***Get in the Game - Get Playing*—now open**

Get Playing provides up to $100,000 in funding to assist local sport and recreation organisations with facility development so more Queenslanders are encouraged to become involved in the sport or recreation activity of their choice.

***Get in the Game - Get Started*—now open**

Get Started assists children and young people who can least afford or may otherwise benefit from joining a sport or recreation club.

Young Athlete Assistance Program

This program assists young athletes in Queensland who have competed at a State or State School Championship, National or National School Championship or International Championship.

***Get Out, Get Active*—now open**

Get Out, Get Active is a new $200,000 commitment that will be launched in mid-2014

Application tips

What we're looking for:

We want to deliver valuable benefits to the wider community. We want to help children live a more balanced, active and enriched lifestyle. Our sponsorships must reflect a grassroots and community focus.

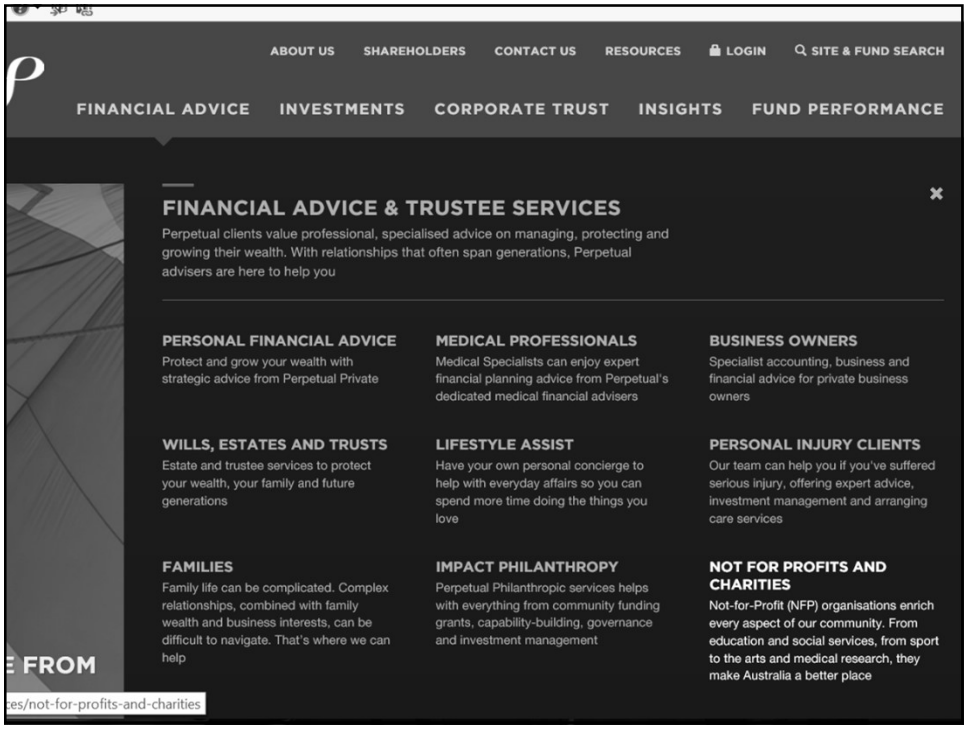
What we're not looking for:

Being one of many sponsors in a cluttered commercial environment.

What we need from you:

In your proposal, please include:

Name, details and credentials of your organisation
Whether it's a local, state or national sponsorship
Description of the event or project
Where and when the event is held
Project timeline
Profile of the target audience
Details of other confirmed sponsors
Media partners and details of confirmed exposure
Level of sponsorship sought (principal, co-sponsor, supplier etc)
Value-in-kind and cash requested
Details of all the benefits of the sponsorship with an estimation of their worth
Any further ideas you wish to include


ABOUT US
SHAREHOLDERS
CONTACT US
RESOURCES
LOGIN
SITE & FUND SEARCH
FINANCIAL ADVICE
INVESTMENTS
CORPORATE TRUST
INSIGHTS
FUND PERFORMANCE
FINANCIAL ADVICE & TRUSTEE SERVICES
Perpetual clients value professional, specialised advice on managing, protecting and growing their wealth. With relationships that often span generations, Perpetual advisers are here to help you
PERSONAL FINANCIAL ADVICE
Protect and grow your wealth with strategic advice from Perpetual Private
MEDICAL PROFESSIONALS
Medical Specialists can enjoy expert financial planning advice from Perpetual's dedicated medical financial advisers
BUSINESS OWNERS
Specialist accounting, business and financial advice for private business owners
WILLS, ESTATES AND TRUSTS
Estate and trustee services to protect your wealth, your family and future generations
LIFESTYLE ASSIST
Have your own personal concierge to help with everyday affairs so you can spend more time doing the things you love
PERSONAL INJURY CLIENTS
Our team can help you if you've suffered serious injury, offering expert advice, investment management and arranging care services
FAMILIES
Family life can be complicated. Complex relationships, combined with family wealth and business interests, can be difficult to navigate. That's where we can help
IMPACT PHILANTHROPY
Perpetual Philanthropic services helps with everything from community funding grants, capability-building, governance and investment management
NOT FOR PROFITS AND CHARITIES
Not-for-Profit (NFP) organisations enrich every aspect of our community. From education and social services, from sport to the arts and medical research, they make Australia a better place
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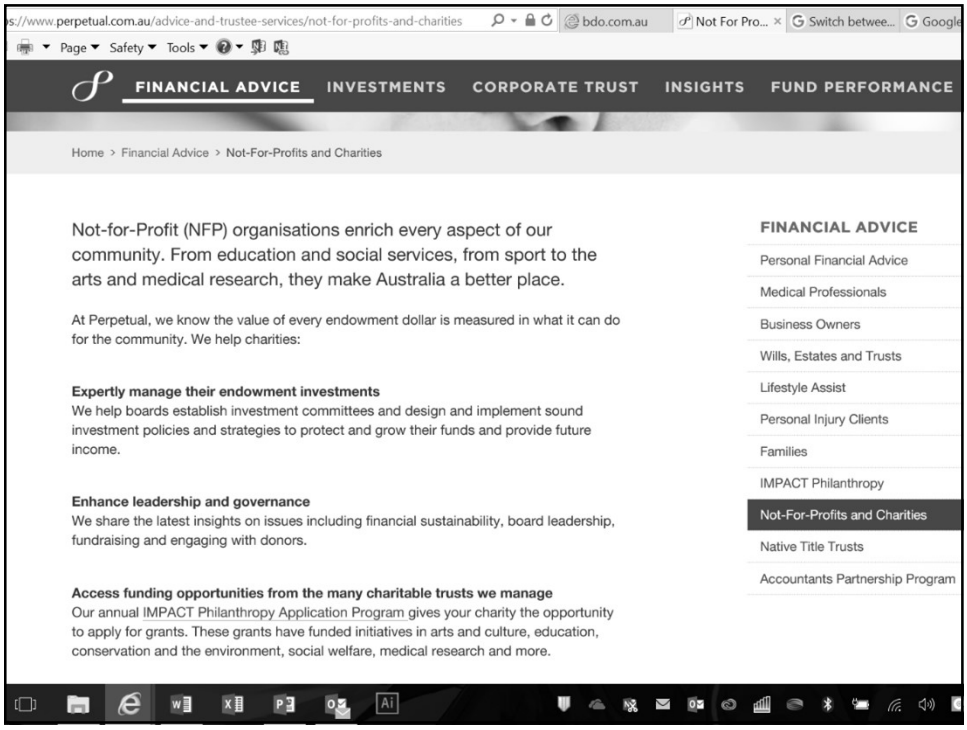
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Not-for-Profit (NFP) organisations enrich every aspect of our community. From education and social services, from sport to the arts and medical research, they make Australia a better place.
At Perpetual, we know the value of every endowment dollar is measured in what it can do for the community. We help charities:
Expertly manage their endowment investments
We help boards establish investment committees and design and implement sound investment policies and strategies to protect and grow their funds and provide future income.
Enhance leadership and governance
We share the latest insights on issues including financial sustainability, board leadership, fundraising and engaging with donors.
Access funding opportunities from the many charitable trusts we manage
Our annual IMPACT Philanthropy Application Program gives your charity the opportunity to apply for grants. These grants have funded initiatives in arts and culture, education, conservation and the environment, social welfare, medical research and more.
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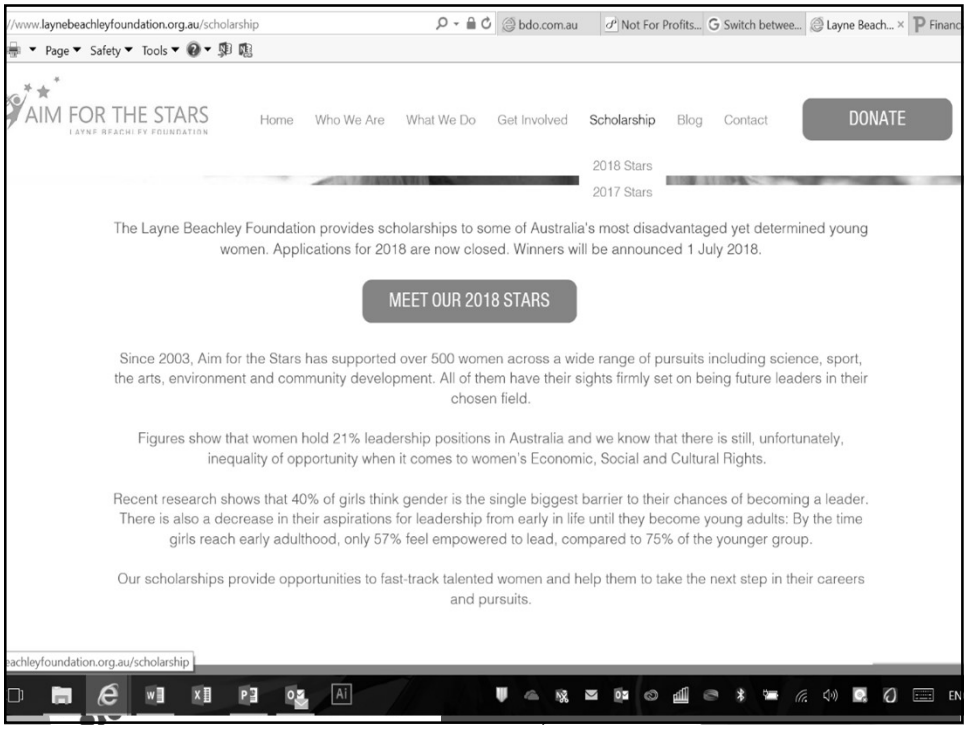
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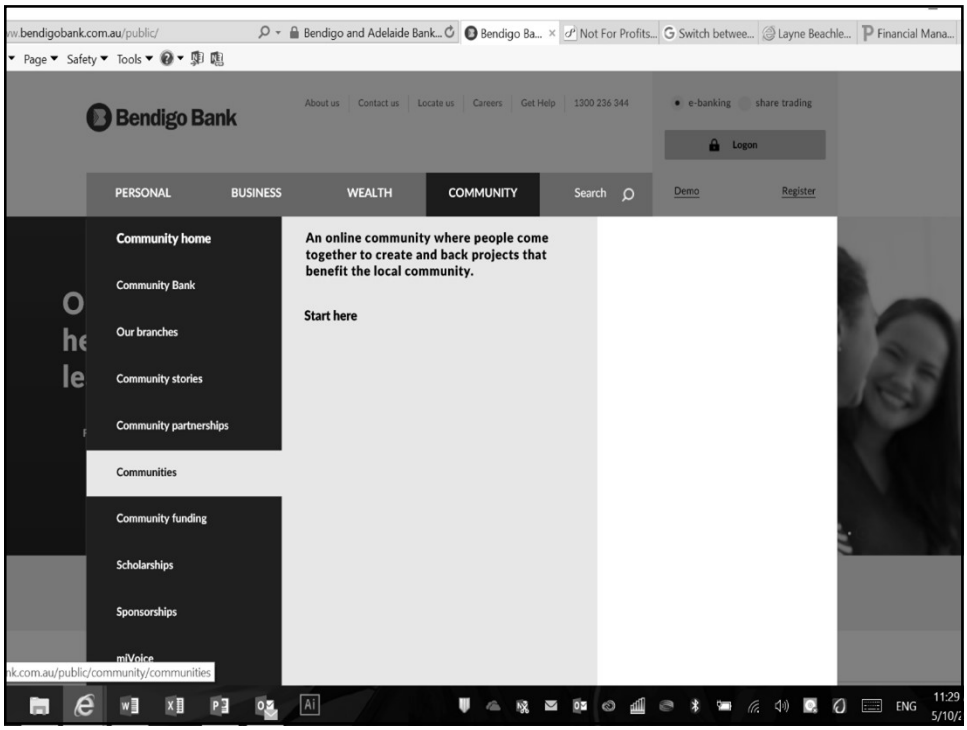
2018 Stars
2017 Stars
The Layne Beachley Foundation provides scholarships to some of Australia's most disadvantaged yet determined young women. Applications for 2018 are now closed. Winners will be announced 1 July 2018.
MEET OUR 2018 STARS
Since 2003, Aim for the Stars has supported over 500 women across a wide range of pursuits including science, sport, the arts, environment and community development. All of them have their sights firmly set on being future leaders in their chosen field.
Figures show that women hold 21% leadership positions in Australia and we know that there is still, unfortunately, inequality of opportunity when it comes to women's Economic, Social and Cultural Rights.
Recent research shows that 40% of girls think gender is the single biggest barrier to their chances of becoming a leader. There is also a decrease in their aspirations for leadership from early in life until they become young adults: By the time girls reach early adulthood, only 57% feel empowered to lead, compared to 75% of the younger group.
Our scholarships provide opportunities to fast-track talented women and help them to take the next step in their careers and pursuits.
achleyfoundation.org.au/scholarship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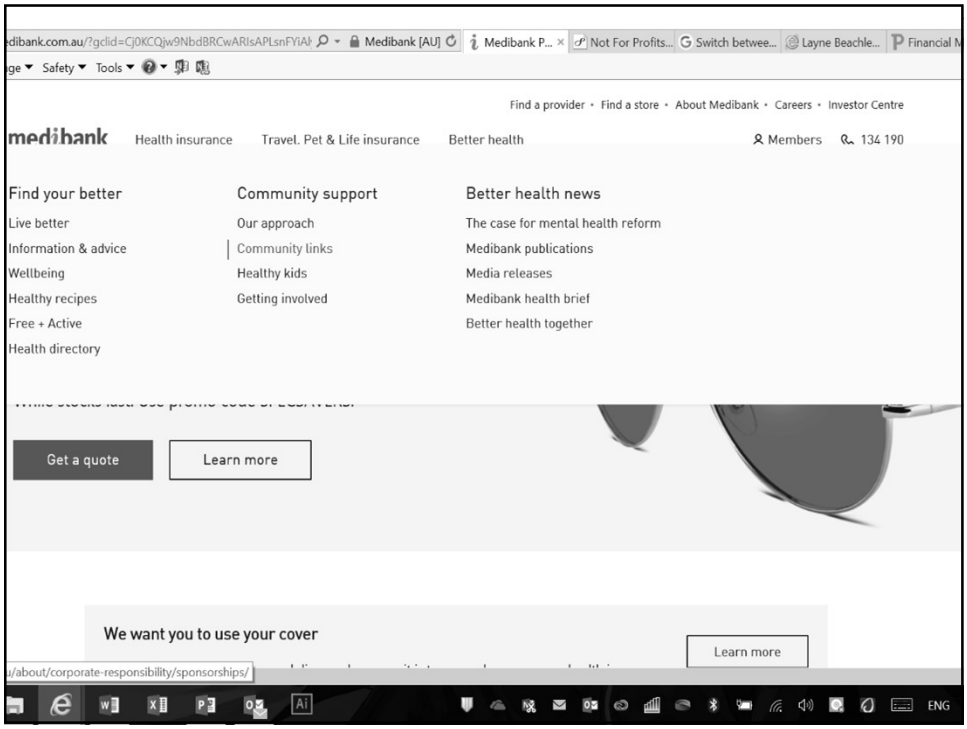
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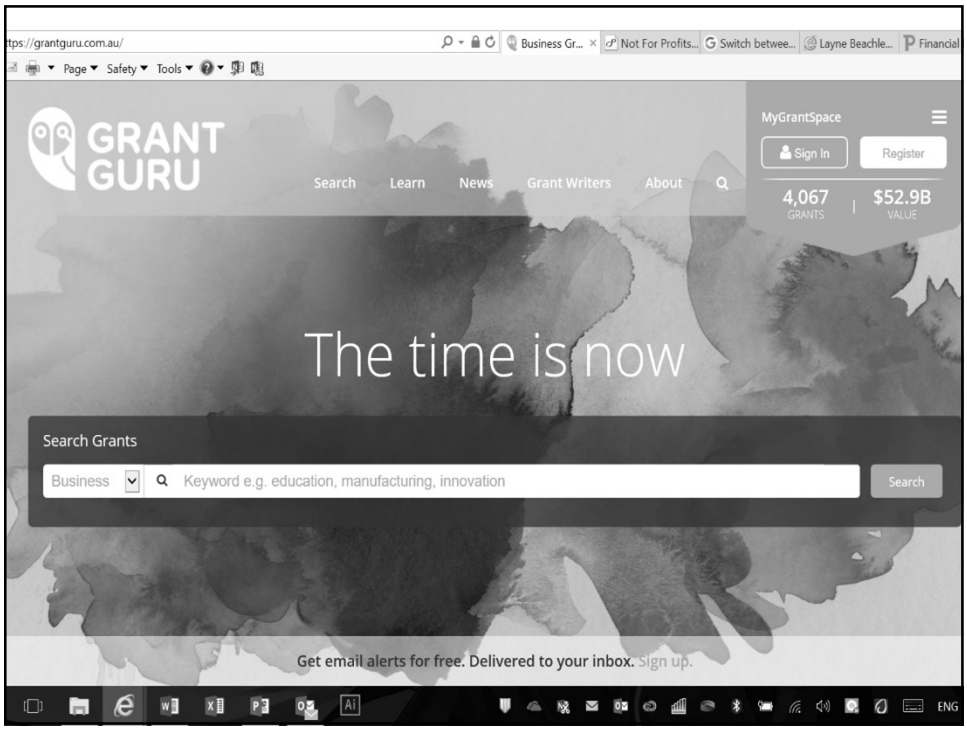
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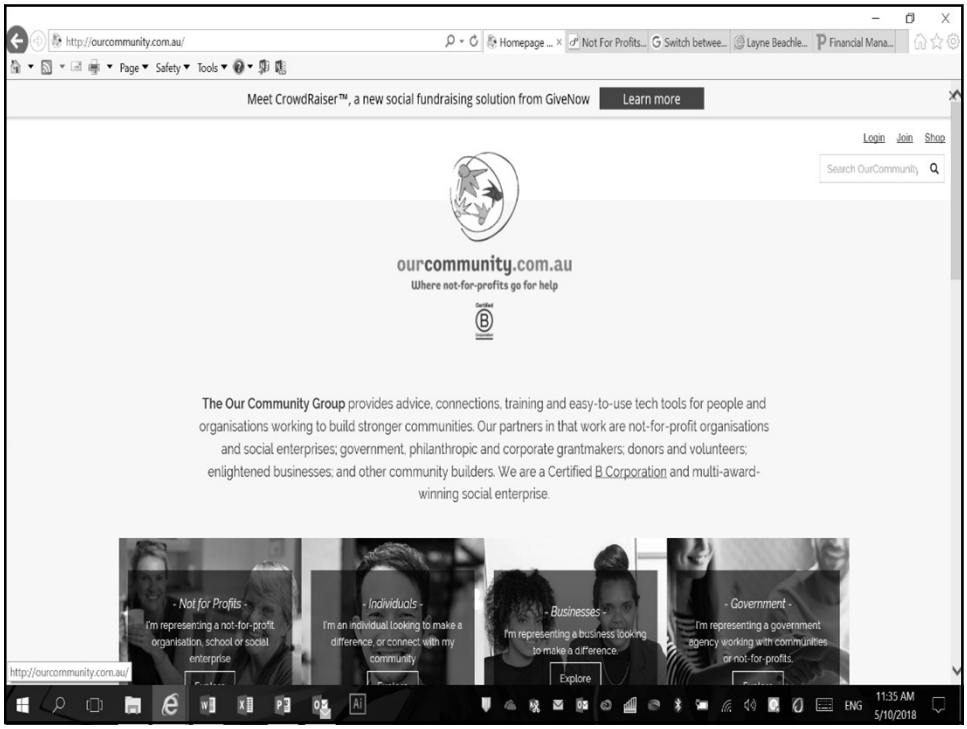
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The Our Community Group provides advice, connections, training and easy-to-use tech tools for people and organisations working to build stronger communities. Our partners in that work are not-for-profit organisations and social enterprises; government, philanthropic and corporate grantmakers; donors and volunteers; enlightened businesses; and other community builders. We are a Certified B Corporation and multi-award-winning social enterprise.
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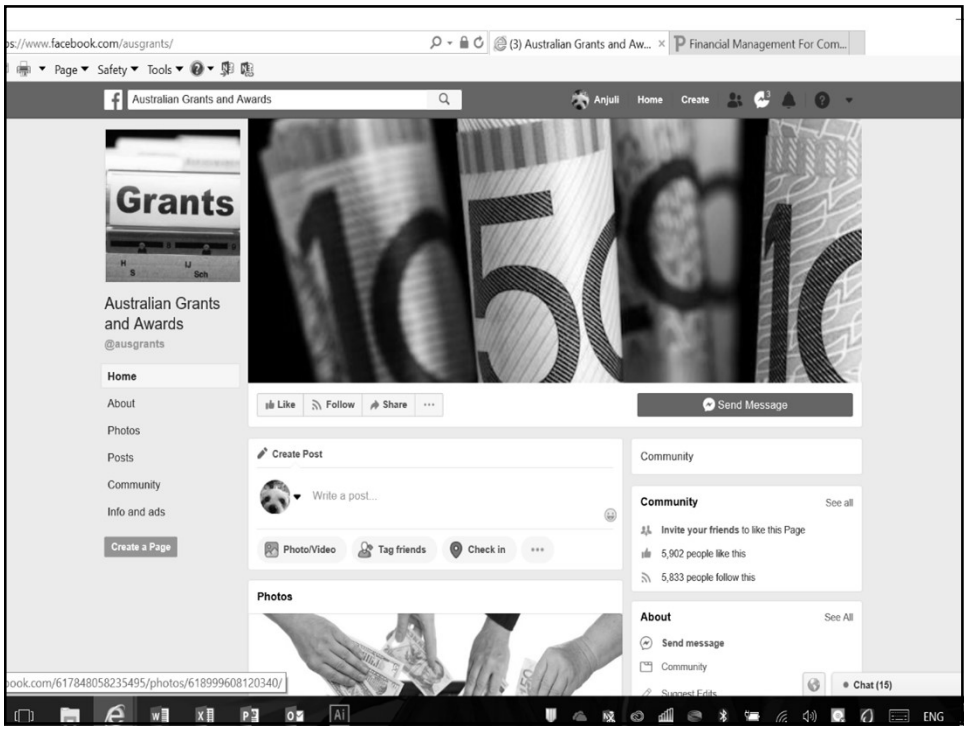
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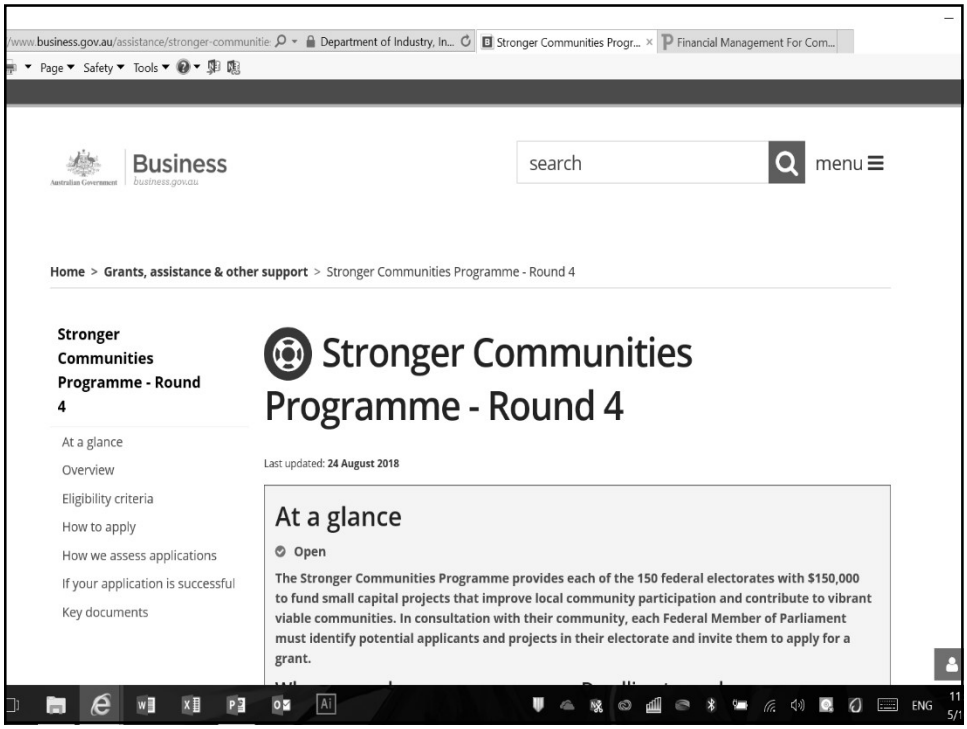
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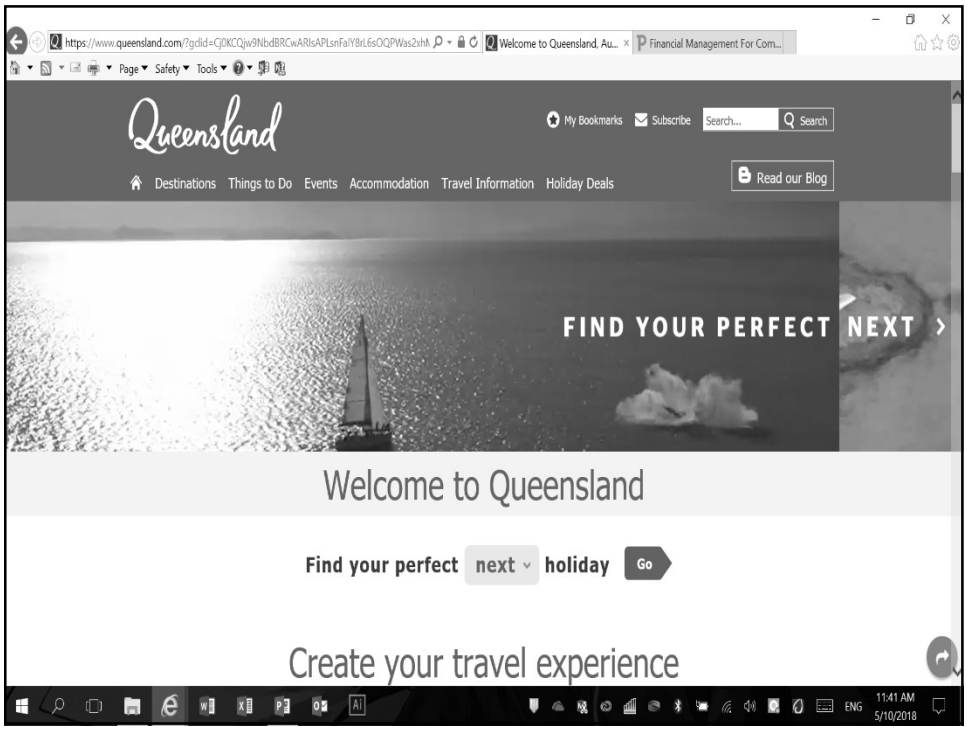
Stronger Communities Programme - Round 4
At a glance
Overview
Eligibility criteria
How to apply
How we assess applications
If your application is successful
Key documents
Stronger Communities Programme - Round 4
Last updated: 24 August 2018
At a glance
Open
The Stronger Communities Programme provides each of the 150 federal electorates with $150,000 to fund small capital projects that improve local community participation and contribute to vibrant viable communities. In consultation with their community, each Federal Member of Parliament must identify potential applicants and projects in their electorate and invite them to apply for a grant.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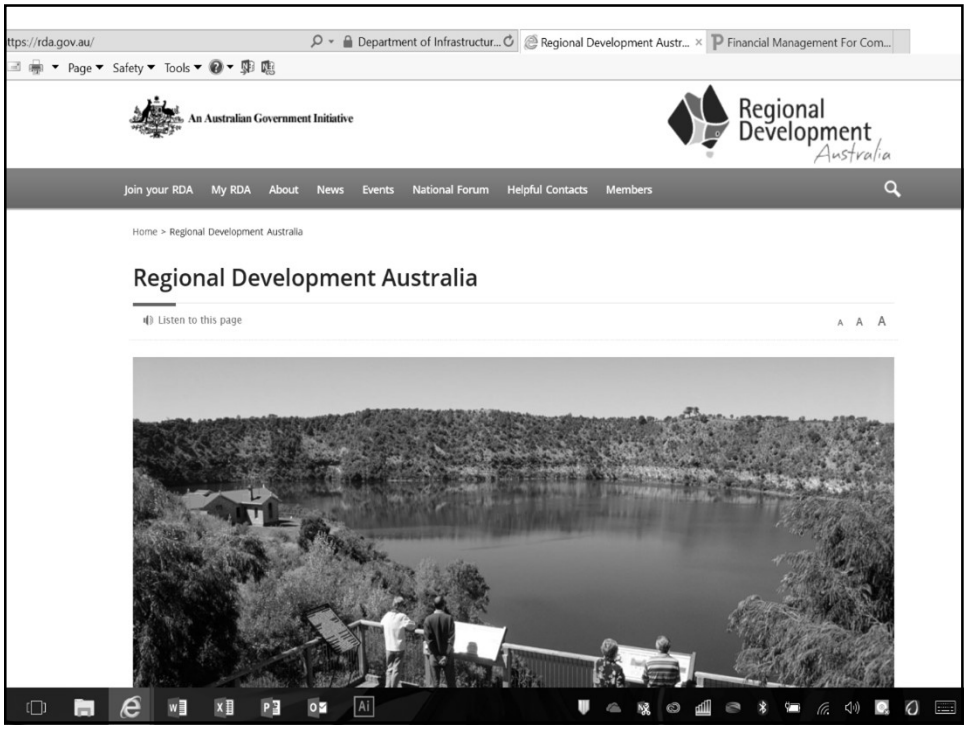
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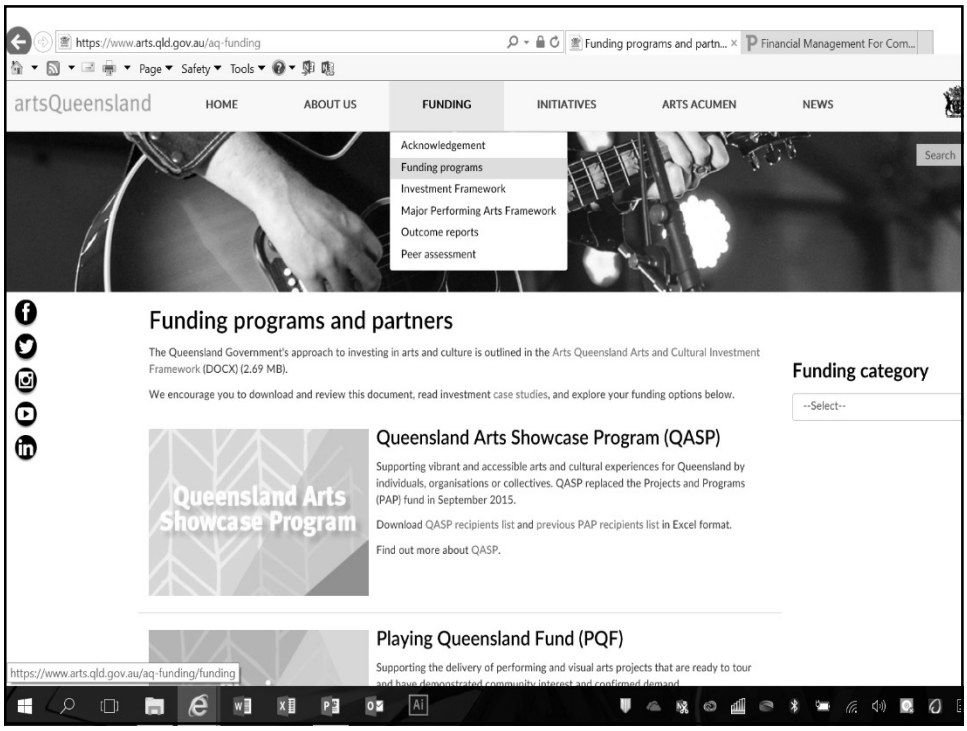
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The Queensland Government's approach to investing in arts and culture is outlined in the Arts Queensland Arts and Cultural Investment Framework (DOCX) (2.69 MB).
We encourage you to download and review this document, read investment case studies, and explore your funding options below.
Funding category
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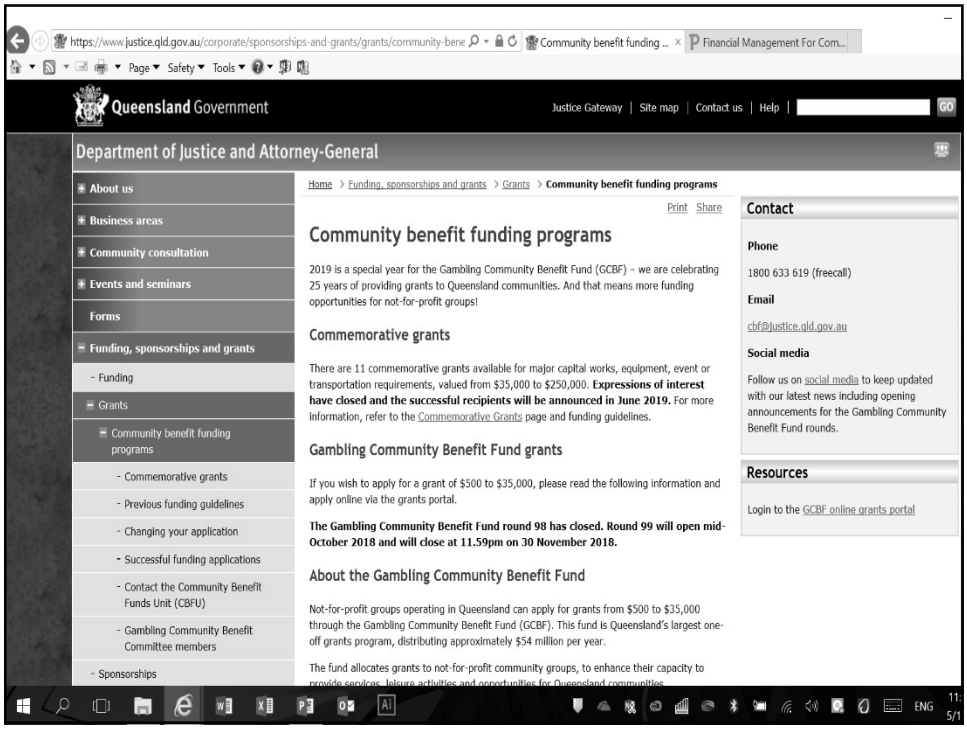
Queensland Arts Showcase Program
Queensland Arts Showcase Program (QASP)
Supporting vibrant and accessible arts and cultural experiences for Queensland by individuals, organisations or collectives. QASP replaced the Projects and Programs (PAP) fund in September 2015.
Download QASP recipients list and previous PAP recipients list in Excel format.
Find out more about QASP.
Playing Queensland Fund (PQF)
Supporting the delivery of performing and visual arts projects that are ready to tour
https://www.arts.qld.gov.au/aq-funding/funding



Gambling Community Benefit Fund

Q. How much funding is available each year?

A. Approximately $50M a year

Q. How much can we apply for?

A. Minimum $500 (incl GST), Maximum $35,000 (incl GST)

Q. When do I submit an application?

A. Closing dates are 28 February, 31 May, 31 August and 30 November

Q. How often can we apply?

A. One application per round.
Must not hold an existing open agreement with CBFU.
Legal entities are permitted to sponsor multiple applications in any one round.

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Why Did You Miss Out & What To Do

- Contact the staff and seek feedback. This will ensure your club improves the quality of any future applications.
- Too many applications
  - Not enough money
- Your application didn't shine for some reason
  - Poor fit with grant's objectives
  - Didn't explain how your project fits in their criteria
  - Quality of application wasn't good enough

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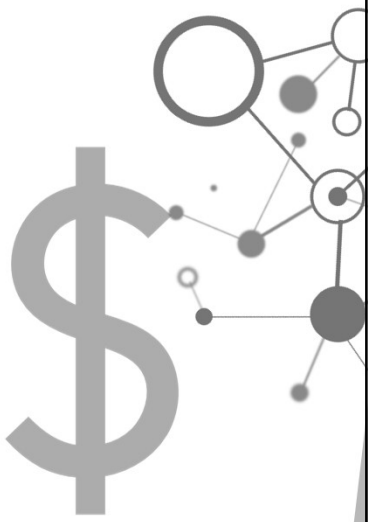
Yes, You Got The Money!

Celebrate	Celebrate the objectives of the project as they are achieved, no matter how small e.g. you can distribute a good news story through your club and local community or post Facebook updates.
Remember	Remember to acknowledge the stakeholders who have supported your club through this project.
Report on	Report on the plan and the project that has been delivered

Fundraising Basics

Fundraising Realities & Successes

- Most clubs make about 10% of their annual income from fundraising.
- Only 3% of clubs make more.
- Pie drives, lamingtons may not suit your audience.
- Consider sports related event, ticket sales.
- McDonalds Marketing (Use Kids)



Improving Your Results

4.6% comes from business

95.4% comes from individuals

Things to improve your chances:

- Fundraising Plan
- Effect of environment, politics on giving etc
- Direct mail
- Capital campaigns for large projects
- Special events that really raise money
- Cause related marketing (% of sales to club)

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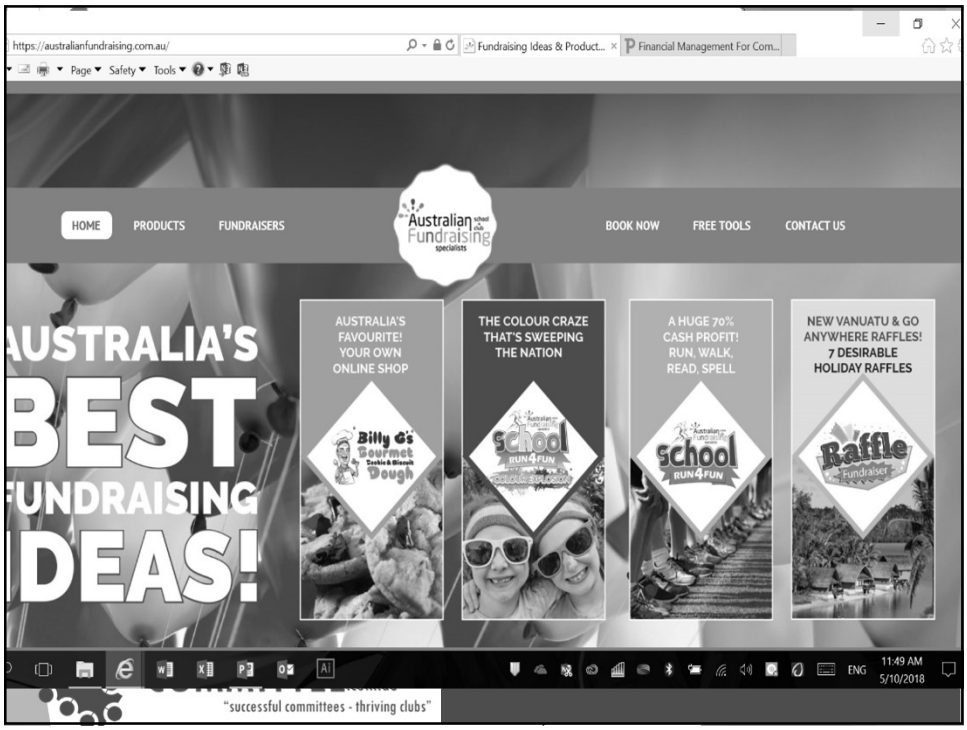

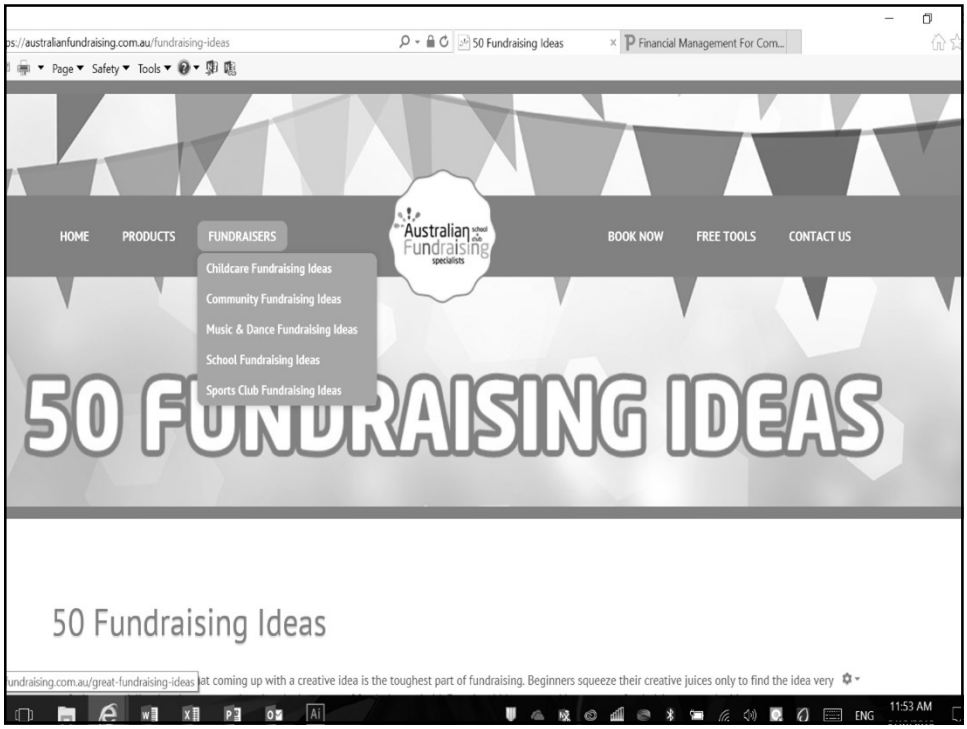
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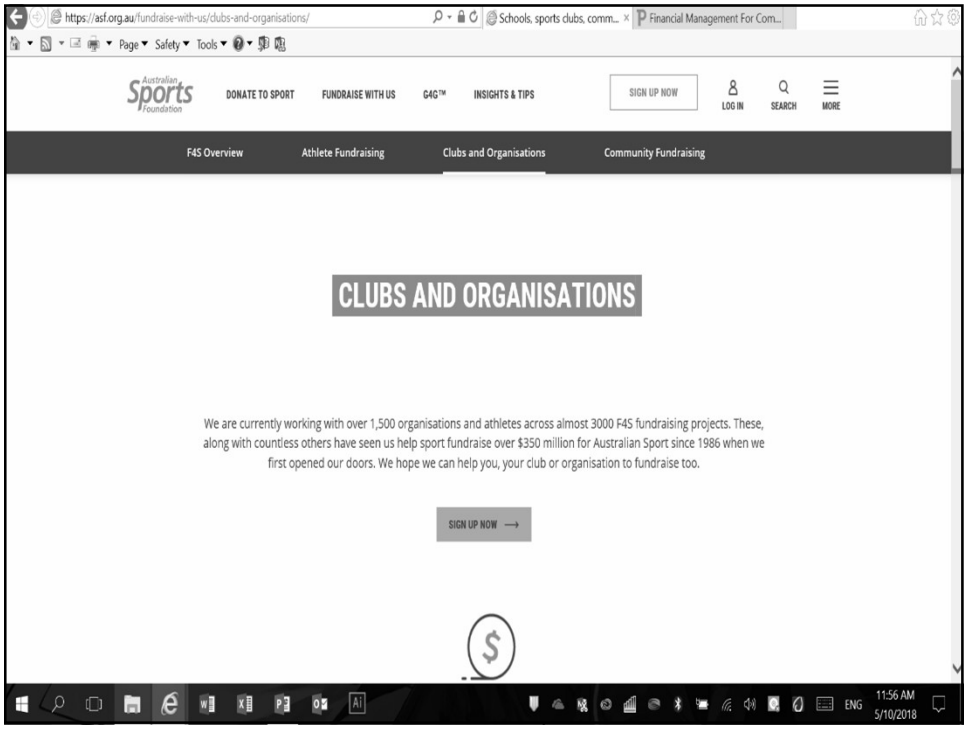
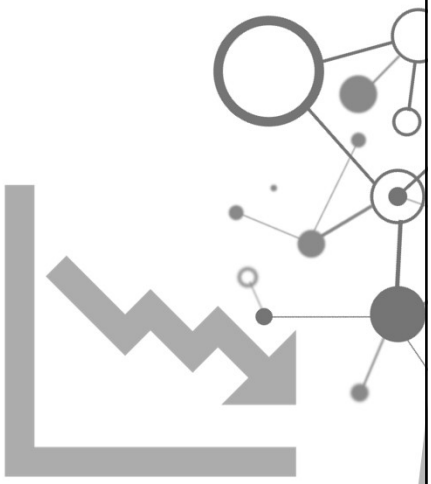


Decreasing Expenses

- Its easier to decrease expenses than increase sales.
- Increasing sales can actually cost your club money.
- Decreasing expenses realises immediate results but is a short term solution.



Decreasing Expenses

- Consider bulk purchasing where possible
- Use donations of equipment from members and business.
- Write to business once a year with your wish list
- Put up a list of things you need at the club
- Ask members for their occupation and keep a good database
- Try sharing purchases with another club

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Things To Ask Business

- Collection Tin On Counter
- Whole business volunteers at club as a team building excercise
- Hold staff or customer gold coin morning
- Providing sponsorship for a team
- Sponsoring a community event
- Offering $ or % to anyone from the club using the business
- Offering a meeting room to the club for free
- Agreeing to photocopy a regular newsletter or flyer
- Sending out mail for through your business account,

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Things To Ask Business

- Having your staff members - particularly those with some expertise in financial or legal matters, volunteer
- Offering some of your company's products as an in-kind gift.
- Offering some of your company's excess capacity.
- Offering to be a mentor for people in a group
- Thinking before throwing out unwanted equipment.
- Working with a community group to establish a scholarship or award that promotes positive behaviour.
- Working with a local school or community group to sponsor children

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Things To Ask Business

- Providing a major in-kind gift as a regular raffle prize or fundraiser.
- If you have overstocked or are experiencing a time of excess stock or product, partner with a community group who is able to sell or use the excess.
- Using your own marketing or media opportunities (website, newspaper, radio or TV ads, newsletters, emails)
- Using the technology and skills your company possesses to build a website for a community group.
- Providing a spotter's fee or donation to a community group for every person who comes into your shop
- Offering storage space to a community group for its equipment or goods

Passive Income - Loyalty Schemes

Commissions:

- for all types of insurance 5%-15%
- on travel bookings 5%-10%

Australian Fundraising has 5 major plans including Seaworld, Chocolates, trivia nights etc.

Alliance Marketing

- approach local business for % of sales

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What skills or resources does your club have to sell?

- Resources
  - Grounds / Fields
  - Caravans / Canteen
- Skills
  - People / Computers
  - Volunteers

Building Passive Income

Financial Planning

Provide Comprehensive Plans & Reports

- Prepare a budget at the beginning of every year.
- Monitor income & expenses to the budget.
- Ensure financial obligations are able to be met.
- Profit & Loss, Balance Sheet, Bank Reconciliation to every meeting.
- Make bank statements available to all.
- Never sign blank cheques.

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Drafting & Implementing A Budget

- Start with last year's audit
- Add about 3% to both income & expenditure
- Make some assumptions about what is likely to happen in the coming year eg membership up or down, expenses up.
- Report on Actuals to Budget every month
- Hold a half year review & adjust if necessary
- Consider approving all budgeted expenditure at the beginning of the year
- Leave it out of the drawer and use it every meeting!

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Bank Accounts

- Lots of new options for non profits
- Can cater for multiple signatures online
- Cheque account plus term deposit is somewhat old fashioned solution
- Good management of bank accounts can reduce costs & save on fundraising

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Investment Options

- Develop investment policy
  - 10% of annual profits must be invested
  - 30% of fundraising must be invested
  - All funding must be maximised for income
  - One passive income scheme to be developed per year
  - 50% of investment income to be reinvested

***Always get professional, qualified advice on investment opportunities including risks.

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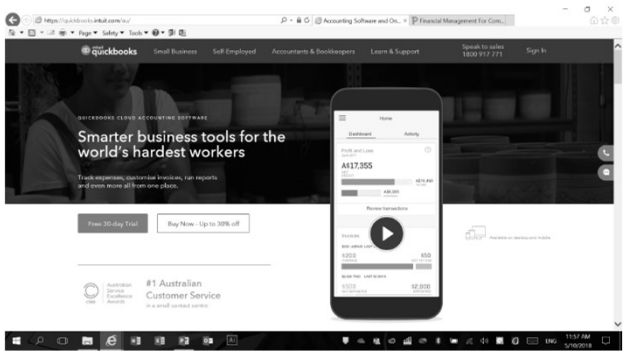
Technology To Help



Quickbooks – From $99.00

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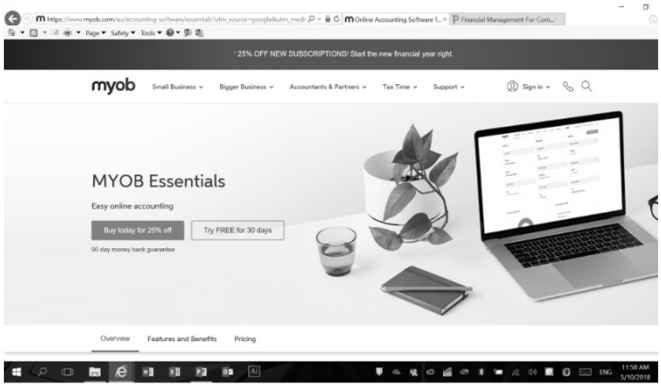

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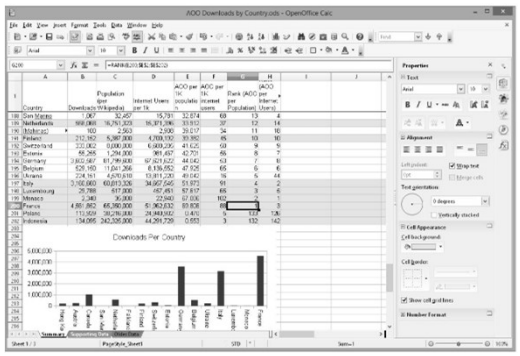

Open Office Excel - $0.00

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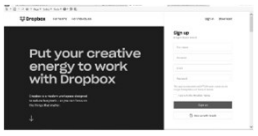

Get On The Cloud!

Keep records on "back end" of site or use group sites for storage! Google Drive and Dropbox can be accessed for free. iCloud has limited storage for free (Mac software only) (20GB) and OneDrive from Microsoft is part of your Office 365 subscription (100GB).

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The Right Volunteer In The Right Job!

A Sucky System

- Volunteering remains a "dirty secret" in most clubs
  - More marketing
- Has no value in member's minds
  - Turn up .. Participate .. Leave
- There is little understanding (or marketing) of the importance of helping
  - Free help keeps participation affordable!
- Some clubs like to focus on genuine 1973 pricing and fear increasing fees
  - May not be an sensitive as you think

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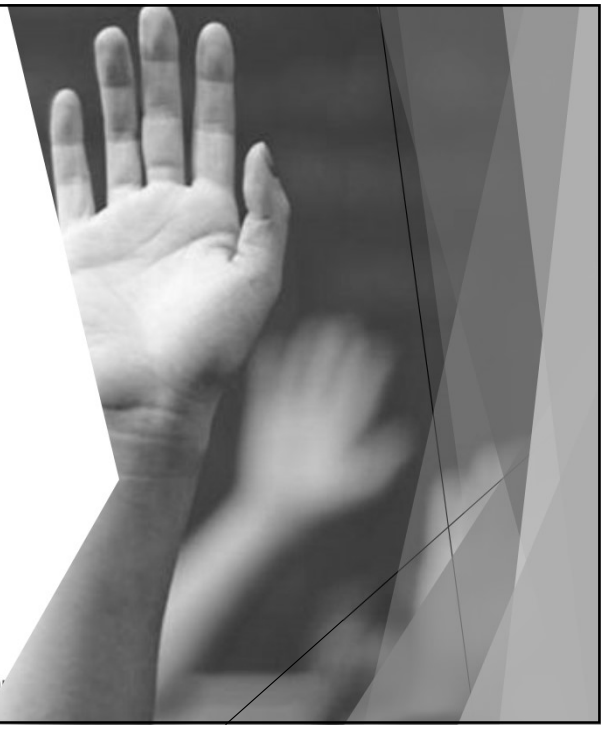
Do They Have Skills & Knowledge Or Just A Pulse?

- Most clubs take anyone on the committee who steps forward (by attending the AGM)
- Questionable results sometimes follow
- A pulse shouldn't be our only requirement
- Like it or not … life changes and some things are getting harder (especially committees)

Questions



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