



ENGLAND ATHLETICS

ESSENTIAL GUIDE TO CLUB FINANCES AND FUNDRAISING

INTRODUCTION

WE are only too aware that no athletics or running club looks the same. There are, however, some fundamental financial processes and practices that we would recommend all clubs consider following to help them improve their financial sustainability and ultimately their ability to survive and provide a high-quality service to their members. It can be a complex and uncomfortable topic for any committee, but it is important to understand why your club needs funds, how much is needed and how the money is going to be raised.

This guidance document contains useful hints, tips and resources for clubs to adopt in order to help them manage, modernise and improve their day-to-day financial processes and efficiencies. England Athletics recognises the challenges for clubs to find a balance between keeping their fees for members at a realistic yet competitive rate, whilst at the same time generating enough revenue to cover operational costs and building reserves for longer term investment and development. This guide should help you to identify useful practices that your club can implement to make financial management and planning more efficient and beneficial to your club.

HOW TO USE THIS GUIDE

This guide is for all of England Athletics' affiliated clubs, irrespective of size or the level of your current fundraising experience and/or knowledge. It is split into the following eight sections:

The guide can be read in its entirety or you use the tabs to navigate directly to each section.



NOTE - It is highly recommended that everyone reads Section 1 before progressing to any of the specific income generating guidance included in Sections 2-7.

Keep a look out for the following icons for additional advice and guidance tailored to help you work at a level that is appropriate for you and your club.



Novice – If you and your club have no experience with income generation and are just getting started.



Intermediate – If your club is successfully generating income but you'd benefit from refining, improving or expanding your income generating activities.



Experienced – If you're already successfully tackling several income generation activities and have resource dedicated to this but you want to make some significant growth and developments in this area.



1

GETTING
STARTED

Section 1

Getting started



In a commercial or business setting a significant amount of time and resource is spent on financial planning. The bigger and more complex the business, the more time consuming and complex this is. For voluntary athletics and running clubs, this can be seen as unnecessary and time consuming. But taking some time to carry out some basic planning can have both short and long-term benefits for the club, and actually save time and resource in the future. Focusing on some basic principles and answering the following questions is an ideal place to start: *Why? How much? When? Who?*

WHY DO WE NEED THE MONEY?

It seems obvious, but you'll be surprised how many clubs/groups/organisations set out to generate income or raise money but don't actually know exactly what the money is required for.

To cover operational costs

Operational costs are the expenses which relate to the general operation of your club. They are the

cost of resources used by your club just to maintain its existence. Where possible, operating costs should be predominately covered by membership fees. If this is not the case, it may be that your club needs to review its membership fee structure before embarking on alternative income generating activity. All clubs should have an annual budget that underpins all of the club's activities and will identify both the operational costs and income. For the majority of clubs, those costs are limited to facility hire, transport, equipment etc, but it becomes more complex for clubs that own or operate their own facility.

Section 1

Getting Started



To cover a capital expense/facility or equipment maintenance

This is the money your club requires to maintain or improve something existing or purchase new fixed assets such as an athletics facility, buildings or equipment. These expenses can vary significantly depending upon the clubs individual needs and whether or not the club has responsibility for managing and operating a facility. An up-to-date Trackmark report will help clubs to understand what costs are likely to be incurred over a given period and help them to

plan accordingly.

Ideally, your club will have a long-term budget as well as an annual budget which will help to identify any planned capital expenses. Capital expenses often require clubs to source additional funding through [fundraising](#), [grant funding](#) and/or [sponsorship](#).

To create a sinking fund

Safeguarding the future sustainability of the club is good practice, and where you have direct

responsibility for the future refurbishment of a track, setting up a sinking fund is recommended.

A sinking fund is a long-term savings account which ensures that there is capital set aside to cover one-off expenses in the future e.g. resurfacing the athletics track. An up-to-date track assessment as part of the Trackmark accreditation scheme should give you information in the lifespan for your track and help you to build this fund up over a given period.

Section 1

Getting Started

Reserves/emergency fund

It is highly likely that at some point throughout the year, clubs will encounter operational costs that they have not budgeted for. These costs may include things like training qualifications, replacement equipment or new kit. A contingency fund to cover these additional and unexpected operational costs may not be the club's main priority but again would be good practice. Fundraising activity would be a good income stream to build an emergency fund.

The coronavirus crisis is clearly an example where there is potentially significant loss of income from a range of sources such as race income, membership and events,

Every club will have a different optimal level of reserves. If reserves are set too high, then money will be tied up unnecessarily when it could be used for other means. If reserves are set too low, then the club may not have adequate funds to deal with emergencies and unexpected events.

SOME KEY FACTORS TO CONSIDER WHEN WORKING OUT YOUR RESERVES

FACTOR	EXAMPLES
What is the current and future income, and how reliable is it?	Membership fees are due in September each year. We think 90% of members will renew but in a worst case scenario it could be 60%, which would result in a deficit of three months' operating costs over the year. We will therefore allow for three months' operating costs in reserves.
What is current and future expenditure, and what sorts of emergency or unexpected expenditure could arise?	The club owns its own facilities and is responsible for repairs. The facilities are generally in good condition but £5k is set aside for emergency repairs that may arise.
Are there any other reasons why money may be needed in reserves?	The club can apply for a match funded project this year, but requires £5k of its own funds to contribute towards it. A specific facility upgrade has been targeted which costs £10k.

Section 1

Getting Started

Some key factors to consider when working out the reserves that are needed are:

Once the target amount of reserves has been calculated, then a reserves policy can be created which sets out:

- The background to the club
- Why reserves are required and the steps involved in calculating how much is needed
- The level needed and how it will be monitored
- How and when the policy will be reviewed

Further information on reserves is available at the following links. Although they have been created for charities, the logic and methodology applies to other legal entities:



**MORE
INFO
HERE**

Search 'Charities
and Reserves'



**MORE
INFO
HERE**

Search 'Charities
and Reserves
Factsheet'



RESTRICTED VERSUS UNRESTRICTED INCOME

By considering 'why' your club needs the money, you will be able to identify whether you need to raise unrestricted funds or whether you can also turn to restricted income channels. This will determine what activity you may or may not be able to pursue. Restricted income is when a donor or funder may designate or 'restrict' the use of their donations for a particular purpose or project. Often grants from foundations are restricted to a particular programme or purpose. Unrestricted funds is money raised that may be used for any purpose. Unrestricted funds usually go towards the operating expenses of the organisation or to a particular project that the organisation selects.



HOW MUCH MONEY DO WE NEED?

Once you know what you need the money for, it is important to have some idea of how much money you will need as this will again determine the type and volume of activity that you pursue. If you only need to raise a small amount of cash then there will be many fundraising activities that you can do quite easily. However, if you need to raise thousands or even millions then you will need a much more detailed plan.

Research the associated costs, either by seeking quotes from suppliers or speaking to other clubs who have been in a similar position. If you are looking to create a 'sinking fund' or 'emergency fund' you will not have an immediate need for a particular amount of money but it is still advisable to set a target and know how much you are aiming to raise. Whilst it is impossible to predict a situation such as coronavirus, it is important to have a good understanding of your current income streams and how each of these might be impacted. This will help you to plan the activity and to manage expectations of those around you.

KEEPING SAFE AND LEGAL

In fundraising, there are a lot of restrictions and regulations (particularly for registered charities) around 'restricted income'.

In its simplest terms, you **MUST** make sure that you do not suggest money is for a restricted purpose (such as refurbishing the changing rooms) when it may be used for a different purpose or for the general purposes of the organisation.

WHEN DO WE NEED THE MONEY?

The next critical question to answer is 'when?'. When do you need the money? This will help to determine:

- What activity you will focus on
- When you will need to start/complete the activity

If you are not time sensitive then you will have a broader range of activities to choose from but remember that some fundraising activities, along with *sponsorship* and *grant funding*, can have turnaround times of anywhere between three and 12 months.

If you need a small amount of cash but quickly then you might be able to focus on a few smaller fundraising activities that incorporate club social activity.





WHO IS RESPONSIBLE?

'Who?' is a really crucial question in all areas of income generation. Income generation, particularly fundraising, should not be done alone. It is the responsibility of every club member.

The chances are that you are reading this as the sole individual who has volunteered (perhaps reluctantly) to review income generation and

fundraising. This does not mean that you should do it alone, but it is important to understand who you can involve and how.

Before being able to determine what income generating activity your club should pursue, you need to understand who is going to be able to support this and what interests and skill sets they have.

CAN YOU ANSWER THE FOLLOWING 10 'WHO' QUESTIONS?

- 1** Who within your club is responsible for the co-ordination of income generation efforts?
What are their demographics and interests?
What are their skill sets?
What other resources do you have at your disposal? e.g. facilities etc.
- 2** Who is already involved in income generation or who could be involved moving forwards?
What are their demographics and interests?
What are their skill sets?
- 3** Who are you going to approach?
- 4** Who is going to do the approaching?
- 5** Who is going to "record and bank"?
- 6** Who is going to "thank and steward"?
- 7** Who is responsible for ensuring that any benefits promised as part of any income are delivered?
- 8** Who is going to help publicise your club's need for money?
- 9** Who knows how much money you need and what you will do with any income generated?
- 10** Who is going to decide which income generation process to work on first/next?

Section 1

Getting Started

BUT WE DON'T KNOW ANYONE!

Let's look at a potential scenario.

Steve is a member of a local track and field club. Steve's club need to raise some extra money in order to purchase new equipment and a new container to keep it in.

The club uses the running track at the local school that Steve's children attend. Steve's club are keen for all of their members to get involved in fundraising. But Steve doesn't think there's

much point in him getting involved. He works for the local council and everyone knows how short of cash local councils are. He doesn't know anyone very rich and he doesn't think he can play any useful part in helping the club raise money.

This is where mapping your networks becomes really useful.

Steve has around 200 colleagues who also work

at the council. He's been there for a number of years so lots of people know him. If he asked his employer to hold a dress down Friday in aid of his club, he could easily raise £100.

The council also give their staff 'Volunteering Days'. Steve could encourage some of his colleagues to use one of their days to volunteer for the club, either volunteering at an event, doing some fundraising, or working on the track and in the existing equipment store.



Section 1

Getting Started

Network mapping

Research in the US suggests that people are 200 times more likely to engage with a cause if approached by a peer in their own networks rather than approached 'cold' by someone they don't know.

Thus, mapping your networks and working out who are the warm approaches is a really useful activity to undertake.

Steve's wife works at a large local call centre. If she holds an event to raise money, her employer will match her fundraising.

Steve lives four doors away from his parents, in the same street he grew up in. He has some great friends and neighbours who can all see how much he and his health have benefitted from joining the running club. Not only could they sponsor him to take part in an event, a number of them might also take part in it too and get their own sponsors. They are also likely to know and be able to introduce you to people in companies or networks you would like to gain access to.

The school, whose premises and equipment the running club uses, also needs to raise money. They have facilities but not much time on their hands. The school and the running club could work together and pool their resources to put on an event that could see them both raise money and their profile.

The club and the school could also start submitting joint grant funding bids to improve the facilities and services they are separately and jointly able to offer to their local community and in doing so, potentially increase their income generation potential too.

And that's just Steve – his running club has another 100 members!



IS FUNDRAISING RIGHT FOR OUR CLUB?

Once you have a clearer picture of why you need the money, how much you need, when you need it and what resources you have to make it possible, you should start to consider which income generation activities are right for your club.

Fundraising is only one option, there are others to consider – some of which you may already do, some of which you might do but could improve or expand and some of which you might have never considered.

Whilst this guide is intended to focus on *fundraising*, it is also useful to review and consider some of the other income generation areas.

WHAT ARE THE DIFFERENT WAYS OF GENERATING INCOME?

Membership

Your club members are the heart and soul of your club. Without them, you have no club. From the smallest road running club to the larger track and field clubs who rent or own their facilities, members and their membership fees are a really important part of running and sustaining your club.

Sponsorship

Sponsorship is a great way to engage with and generate income from local businesses. While cash sponsorship is always preferable, don't forget there are other ways that businesses can support that are also valuable to you. The advantage of sponsorship relationships is that the sponsor organisation and the beneficiary organisation both get something out of the transaction.

Fundraising

Fundraising, as well as being a generically used term for funds raised, more specifically in the club context means charitable and voluntary donations to support your charity or cause. These are not fees and they are not payments for goods or services. Fundraising is by far the broadest income generation area, therefore there is something that every club can do. Activity is scalable and can be easily tailored to demographics, size, characteristics and long-term goals.

Commercial activity

Different to sponsorship, this area covers straightforward hire or sale activity. This can be a particularly lucrative source of income if you own your own premises or have a long-term lease which entitles you to sub-let or sell space use. If your club organises events or races, this would be included here.

Grant funding

Grant funders exist to give money away! Who you can apply to and how you can apply might depend on your club structure, but generally there will be some grants that any and every club is eligible to apply for. They are a great source of income but the application process can be quite labour intensive. The process requires people who are good at researching, good at writing and who are good at telling the story and the WHY of your club.



TASK 1

ESTABLISH AND UNDERSTAND YOUR CURRENT POSITION

Answering this simple set of questions will help you to define where your club “is” in terms of income generation and where to start with increasing activity and returns. Use your answers to help identify your club’s strengths, weaknesses, opportunities and threats

What income do you currently have?

How much is your club currently bringing in on an annual basis?

How is that income comprised?

Is this from membership fees only, membership fees and fundraising, membership fees, sponsorship, fundraising and commercial activity? Who is responsible for securing and collecting it?

What are your existing costs?

Make sure you cover everything relating to the operation of the club regardless of who it is currently paid by

Does your existing income cover your existing costs?

This is a fairly crucial question to answer.

What is the legal structure of your club?

Have you considered adopting charitable status or Community Amateur Sports Club (CASC) status, both of which offer benefits to clubs but also require meeting certain rules and obligations?

What are the characteristics of your club, your members and your local community?

Are you an inner city/suburban/industrial town/rural club? What are the demographics of the area? What is the population of the area you cover? How much interaction do you have with other groups communities?

What are your long-term plans and how much will they cost?

How much of this is people/usage/membership expansion? How much of this is purchase of equipment and facilities?

What facilities or expertise do you have that you could hire out or sell?

What people resource do you have to work on increasing income generation?

What are the skills and strengths of those people? What are the demographics of those people?

Section 1

Getting Started

TASK 2

ESTABLISH WHO YOU KNOW AND HOW THEY CAN HELP

Take some time to research and understand who at your club could potentially help and what their networks are. This will help to determine the type of activity which may or may not be suitable.

Download and complete the network mapping template, take a look at the examples given and then delete the example detail and replace with your own network mapping:



2

MANAGING YOUR CLUB FINANCES



MOST clubs will have their own tried and tested way of managing their day-to-day financial transactions and reporting this back to club committees and members. As long as they meet your legal obligations as a club, there is no right or wrong way to do this. This section includes some useful advice that may help your club to manage its finances.

FINANCIAL SOFTWARE PACKAGES

Whether a club requires a finance software package, rather than using a spreadsheet or paper system, depends on the complexity of the club. In general, the more complex the club, the more useful finance software will be. The following factors will increase the complexity of the club's finances and, therefore, its need for finance software:

- If there are employed staff
- Number of different types of income and expenditure
- Size and number of transactions for the income and expenditure streams
- Ownership of assets, such as a track or clubhouse
- VAT registration

Main benefits and disadvantages of having a finance software package:

- + Increased accuracy and speed:** A software package will automate manual accounting processes, such as adding up transactions in a ledger, preparing VAT returns and performing payroll calculations. This saves staff and volunteer time and greatly reduces the chance of error
- + Automatic document production:** Documents such as invoices and payslips can be created quickly and are instantly and correctly allocated to the club's profit and loss account or balance sheet
- + Faster and more accurate management information:** Software packages allow reports such as profit and loss accounts and debtor lists to be instantly created, giving management an instant view of the club's finances
- Costs:** A software package will take time and money to set up and maintain. However, in the long run, it could save accountancy costs, as external accountants can be given access to the club's software package and so will spend less time putting accounts together themselves

Section 2

Managing Your Club Finances



A low complexity example would be a road running club which doesn't own or lease any assets, has no employed staff, is not VAT registered and only has a few types of income and expenditure. This club may be able to keep track of its finances using a spreadsheet.

A high complexity example would be a track and field club which has a lease on its facilities, employed staff, is VAT registered and has various types of income and expenditure. It would be essential that this club uses a finance software package to accurately record and keep track of its finances. Some popular packages include Xero, QuickBooks Online and FreeAgent. These all offer fairly similar benefits:

- They are designed to be user friendly for people who have limited accounting experience.
- They integrate with other online systems, such as banking, to decrease the time it takes to enter data.
- They can be used via a range of methods, for example, on a computer, phone app or tablet.
- They offer low-cost pricing plans. Additional modules can be purchased when needed.

These packages offer similar functionality and are usually free for the first month, so it is recommended that users download all three, spend time using each one and decide for themselves which one they prefer.



CASH FLOW FORECAST

A cash flow forecast is an estimate of the expected income and expenditure for a future period, typically a year. It is used to plan ahead, make decisions and to track how the club is doing during the year. Creating a forecast which is monitored is important because it:

- Identifies in advance where there might be a problem, such as a cash shortfall.
- Helps you to be proactive and plan ahead rather than be reactive.
- Identifies when there is surplus and how it can be used.

Once the forecast has been created and agreed, it should be compared to actual results on a monthly or quarterly basis. A template has been provided for clubs to create a forecast for the next year and monitor it against actual results.

For clubs who already have a forecast, the process can be enhanced by looking at different scenarios:

- What is the best case scenario? If income is higher than expected, then what will the spare cash be used for?
- What is the worst case scenario? What measures will be used if income is lower than expected?

The key step involved in creating a forecast are:

- 1** Assess your current income and expenditure. What is likely to change in the future?
- 2** Link it to your club's plans for the future. Is there any new income or expenditure to consider?
- 3** Involve the right people:
 - It will be more accurate and people will take more ownership. The key people to involve are those who know the club well or are responsible for a part of the forecast, for example, the treasurer, coaches, committee members, facilities manager, bar manager etc.
 - For a complex and large club, the person preparing the forecast may ask people who are responsible for different areas of the club, such as the head coach, bar manager, facilities manager, etc, to provide an estimate of income and expenditure for the year ahead. These can then be combined into an overall club forecast.

INTERNAL FINANCIAL CONTROLS

These are the methods, policies or procedures adopted in an organisation to:

- Ensure financial information is accurate and reliable
- Ensure compliance with all financial and operational requirements
- Prevent and detect fraudulent behaviour
- Generally assist in achieving the club's objectives

Club committees, as a body, are together responsible for establishing, implementing and monitoring their club's internal financial controls. They may decide to delegate the detailed work on this task to one or more committee members or to members of staff or volunteers. However, the committee should make a collective decision on what controls are needed. It is important that all those working in the club, whether committee members, staff or volunteers, take the issue of internal financial controls seriously. Making controls work should not be seen as just the responsibility of one or two committee members, senior staff members or as applying to some but not others.

Clubs can assess what financial controls are required by following these steps:

- Review the types of assets, income and expenditure in the club.
- Assess the risks related to each one.
- Think about what methods, policies or procedures would mitigate these risks.
- Document the controls.
- Communicate the controls with relevant staff.
- Review at least annually.

Some common examples of assets/income/expenditure, risks relating to them and financial controls to address them can be found in the table over the page. Some controls, such as creating a financial forecast and monitoring it, will cover multiple risks. An example financial policies and procedure manual has been included in the appendix, which club committees should tailor to their individual circumstances.

The following resources offer further information:

Charity Commission

Although not all clubs are charities, this is a useful resource as there is a checklist covering the most common types of controls for different types of assets, income and expenditure. Some further examples of policies and procedures can be found in the links on the right.

MORE INFORMATION

CLICK
HERE

Search 'Financial
Controls for
Charities'

CLICK
HERE

Search 'Financial
Procedures'

CLICK
HERE

Search 'Financial
Procedures'

CLICK
HERE

Search 'Club
Finance'

Section 2

Managing Your Club Finances

ASSET/INCOME/ EXPENDITURE	RISK	FINANCIAL CONTROLS WHICH COULD MITIGATE THE RISK
Asset: Cash in hand	Unbanked cash could be lost or stolen	<ul style="list-style-type: none"> • Use a cash box to collect income on event nights and record all income received in a cash analysis book. • Store cash in a safe and bank it regularly.
Asset: Cash in bank	Unauthorised payments could be made from the bank account	<ul style="list-style-type: none"> • The bank account requires two independent signatories for payments. • Payments above a certain limit (e.g. £5,000) require three signatories.
Income: Member subs	Member subs could be collected and forgotten about, then lost or stolen	<ul style="list-style-type: none"> • Give one person responsibility for creating a list of members and when their subs are due. Give a different person responsibility for collecting them. • Set up a forecast to estimate how much income is expected from subs for the year and monitor it for differences.
Expenditure: Equipment	Purchases for equipment are made which are not required or in line with the club's plans	<ul style="list-style-type: none"> • Set up a forecast to estimate how much expenditure is expected for equipment for the year and monitor it for differences. • For bank payments, one person sets up payments on the online bank account, a second person checks details such as the following before authorising: Payments match invoices and payments are in line with what has been agreed in the forecast.
Expenditure: Staff or volunteer expenses	Staff and volunteers are not consistent in what they reclaim from the club for expenses they have paid personally	<ul style="list-style-type: none"> • Decide what types of expense staff and volunteers can reclaim, how they can reclaim and what backup is required, and formalise the rules in a written policy. Communicate the policy to staff and volunteers. • The people who pay and authorise the payments check that reclaims are in line with the policy.



3 |

MEMBERSHIP

Section 3

Membership

MEMBERS are the heart and soul of your club. Without them, it's unlikely that you would exist – you would effectively have no purpose.

To meet the needs and expectations of your members, the club itself needs to be run effectively and needs to be financially sustainable.

Many clubs rely heavily on income generated from membership fees. They are one of the most common and simplest ways to generate income – for some clubs this is their only income.

As a local club that serves a community, establishing a membership structure and setting membership fees that both support and retain existing members, as well as attract new members, is of equal importance.

Ideally, membership fees should cover the day-to-day financial operating costs (running costs) of the club and, therefore, it is really important that these are set at the right price and are reviewed periodically. This should be done as part of the club's annual budgeting.

Identifying the right membership structure

Whilst price is one of the most important and significant considerations when adopting a

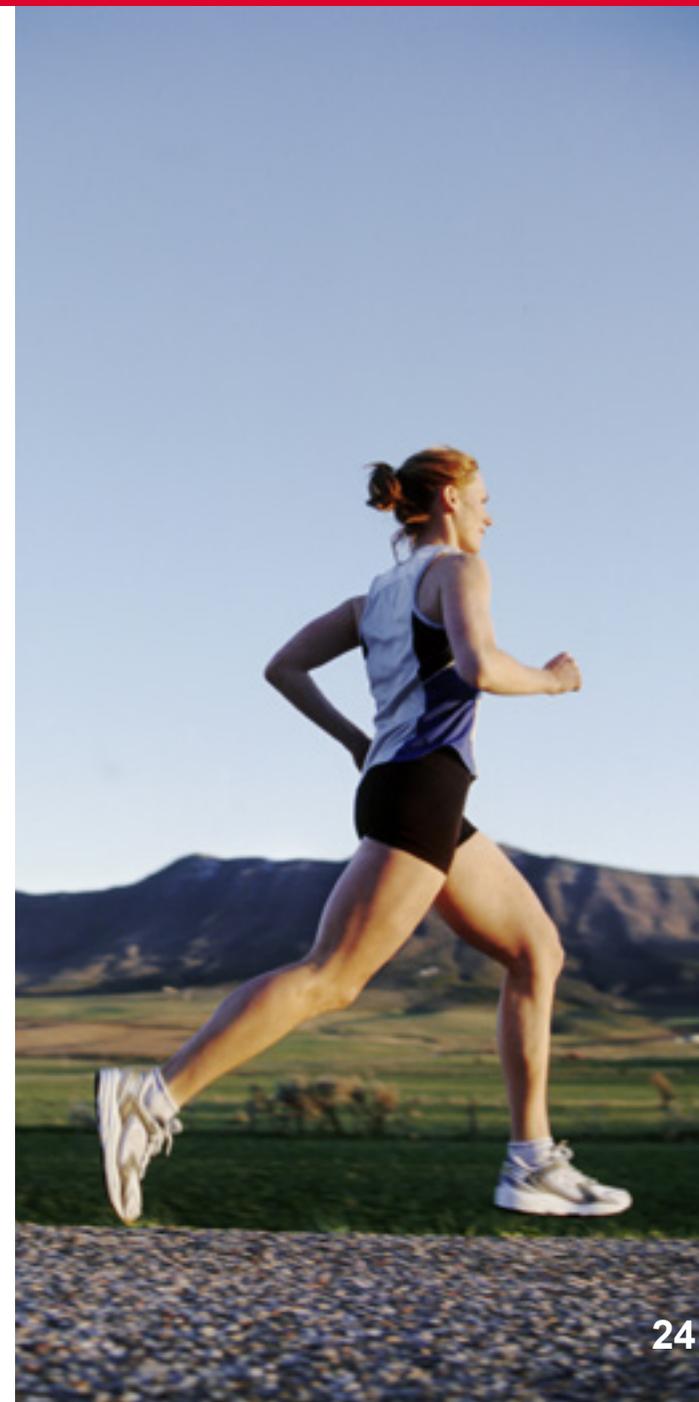
membership structure, there are many other considerations that will also play an important part in keeping your members happy.

Annual membership versus weekly participation fee

Some clubs will have both an annual membership and weekly participation fee but some clubs may opt for one over the other.

When thinking about this, it is also important to consider any additional fees that your members pay out in order to participate. For example, a participation fee direct to the facility or parking payments for using the venue.

You will also need to consider the annual athlete registration fee payable to England Athletics.





Concessions

Who are your members and do they all pay the same fee? It is common for membership structures to have several different rates, suited to different types of members. Think about the following groups of people:

- Adults
- Juniors
- Students
- OAPs
- Social members (i.e. non-participants – parents, partners etc)

Multi-discipline clubs

Do you offer different membership fees for athletes participating in different disciplines (e.g. track and field versus road running or cross country)? It is important that any fees reflect the value that each member is getting from their membership and that this is communicated effectively.

Annual versus monthly payments

Whilst receiving the entire subscriptions from each member at the start of the season is ideal for your club's cash flow, remember that it might be easier and more financially manageable for your members to have the option of making

monthly payments via standing order or direct debit.

Discounts can be used to encourage payment upfront and you will need to consider the resource implications on managing and collecting monthly payments.

Communicating with your members

Raising membership fees can be an emotive issue, so make sure your members know exactly what they are getting for their money and also let them know how your club is funded overall.

The best way to engage with members and to minimise controversy is to be open and honest about the club, its costs, its current financial position, any future aspirations and, most importantly, what the membership fees are specifically paying for.

Often a rise in membership fees is more acceptable if members are well informed about the financial position of the club.

This does not need to be anything fancy; a simple statement of club structure, breakdown of costs and summary of membership benefits is fine. It would also be wise to indicate in the statement how often you intend to increase the fees.

Section 3 Membership

Reviewing your membership fees

When was the last time you reviewed your membership fees? It is recommended that this is done periodically in line with your annual budget.

As a starting point, ask yourself the following questions:

Membership fees planning template



★ Novice

- How do my club's fees compare to the fees of other similar clubs? (If you're unsure, ask your Club Support Manager to suggest a couple of clubs you could benchmark against)
- Do my club's current fees cover our current operational expenditure?
- What increases in expenditure might we face in the coming months?
- How often do we /could we increase fees?
- What payment methods could we consider adopting to make the chasing and collecting of fees much simpler and less time consuming?
- How do/would we communicate this and the need for this to our members?

★★ Intermediate

- All of the above plus:
- What additional levels could we legitimately add to our fee structure?
- What other benefits could we offer our members in order to 1) add value to existing members and 2) attract new members
- How easy is it for people who aren't yet members to find out about us, to come along and 'try us out', and to join?

★★★ Expert

- All of the above plus:
- Can we add social and corporate members? (If we don't already do so)
- What is our membership plan? How many members do we want? At what level? How far are we from this aim? How do we get there?
- Do we have life members, whose contributions to the club we acknowledge and honour through this accolade?



TASK 1

IS OUR CURRENT MEMBERSHIP STRUCTURE ADEQUATE?

- 1 When was the last time you reviewed your membership fees?
- 2 What are your projected operational costs?
- 3 How many potential fee-paying members do you have and what does this equate to across the year?
- 4 Do your projected membership fees cover your projected operational costs?
- 5 How does your current fee structure compare with the membership fees of other local athletics clubs or other similar size/similar facility clubs elsewhere?
- 6 Do your fees reflect the value of what your club is offering?
- 7 Is there scope to increase the fees or should they be reduced to attract more people?
- 8 How could you structure the fees differently to make them more appropriate for your type and size of club?

TASK 2

CRUNCH YOUR NUMBERS

The only way to assess whether an increase in your membership fees or membership numbers could make a significant difference to your budget is to spend some time 'crunching the numbers'.

To help you get started with this, download the membership fees planning template and fill it in with your own club data.

Calculate what the impact would be if you increased your membership numbers and/or membership fees by 5 and 10%.



4

SPONSORSHIP

Section 4

Sponsorship

S **PONSORSHIP** is when a business provides funds, resources or services to an organisation in return for rights and/or association that may be used for their commercial advantage. It is essentially a business transaction. The relationship between the business and the club should be mutually beneficial with the terms and length of the agreement clearly defined by a written agreement from the outset. Finding sponsorship isn't a quick or easy task. It requires commitment and perseverance. You will likely receive many rejections when looking for partnerships but, once established, the benefits can be wide ranging and if approached (and managed) correctly, partnerships have the potential to provide long-term support for your club.

WHAT DO YOU WANT TO GET OUT OF A SPONSORSHIP DEAL?

There's no mistaking that sponsorship can be an invaluable source of financial support. Whilst cash will usually be king, there are many ways in which a business can get involved with your club, offering time, services and goods as well as cash.

CASH – an agreed sum of money, paid across an agreed time period. It's important to have realistic expectations before approaching sponsors for cash support. Knowing that you can offer sponsorship benefits that are commercially attractive and represent good value for the potential

sponsor is key.

VALUE IN KIND – the free provision of products and/or services. What expenditure does your club currently incur? Are there products and/or services that could be provided as 'value in kind' from local businesses, therefore enabling the club to make critical budgetary savings. Examples might include kit, equipment, signage, storage or utilities.

EXPERTISE – the free provision of staff time and expertise. Are there areas of expertise that your club could benefit from, but you don't have the volunteers or the funds to pay for it? For example, book-keeping, accountancy, legal advice, IT support or marketing.

VOLUNTEERS – provision of staff as volunteers to help at club events or competitions.

Employees from local businesses who will volunteer a day of their time, either as a group or individually, to support at events, help with general maintenance and/or renovations, or to support the club with profile raising/income generating activities.

AWARENESS – Helping to extend your reach within the local community. Increased awareness is key to the sustainability of any club. Sponsors can provide access to their extended networks, opening doors to other local businesses and connections as well as helping to attract new members by raising the profile of the club.



Section 4 Sponsorship

WHAT DOES THE BUSINESS WANT OUT OF A SPONSORSHIP DEAL?

Firstly, consider 'what's in it for the business?'. Why might a business want to get involved with your club? Common business reasons for sponsorship relationships include:

- Being seen to support things in their local community
- Supporting clubs and organisations that are important to their staff
- Supporting clubs and organisations that are important to their clients and customers
- Supporting clubs and organisations that are comprised of, or followed by their target audience
- Supporting the interests of the key directors/ owners (how many of your club members are business owners themselves?)
- Supporting industry/product related organisations
- Supporting clubs and organisations that can help promote and assist the health and wellbeing of their staff/people living locally

Common benefits that are useful to these businesses can be found in the graphic on the right.





WHAT CAN YOU OFFER TO BUSINESSES?

What do you have to offer that aligns with any of the motivations and/or benefits that businesses want out of a sponsorship deal?

- Access to a club membership of xx people all living within a 20-mile radius and all interested in running and/or wider athletics, and, therefore, probably interested in health, fitness, wellbeing, eating well, nutrition, other forms of exercise, socialising etc
- What additional information do you know about your membership – age, gender, geography etc?
- Online exposure – know your digital reach through both social media and your website
- E-comms – inclusion within newsletters that go to xx members
- Ground/facilities sponsorship – track side hoardings
- Kit/equipment sponsorship
- Race/Meet day sponsorship
- Naming of your members club (the Garstang Roadrunners Club – Sponsored by Tyler Electrical)
- Face-to-face promotion at training and coaching sessions
- Create a competition or Try It day with them as the named sponsor
- Events they can create or jointly hold to invite your club members to

- End-of-season celebration events
- Development work with potential new members
- Health and wellbeing benefit – you go into their workplace and hold events for their staff (and potentially staff families)

WHAT DO YOU WANT/NEED?

Now you need to return to your original questions as identified in Section 1. Why do you need their support and how much money/ support do you need?

WHAT WILL YOU ASK FOR?

This is NOT just about how much you need. This is about finding a balance between what the sponsor wants, what you can offer and the perceived value of benefit of that exchange. Obviously the more attractive the perceived benefit, the greater the amount you could ask for.



ADDITIONAL CONSIDERATIONS

You will also need to carefully consider:

- Who is going to actively seek the sponsors, research them and approach them?
It is important to understand a potential sponsor's business objectives
- Who is going to write and approve the sponsorship agreement
- Who is going to oversee the relationship to ensure that they're looked after and get what they're expecting
- How many sponsorships or businesses can we as a club and committee cope with?
- How much can we charge for each opportunity and is that commercially viable?
- Who is going to secure and take the payment and make sure it's acknowledged, thanked



TASK 1

WHAT SPONSORSHIP OPPORTUNITIES DO WE HAVE?

Before approaching local businesses, it is critical that you first understand exactly what your club has to offer and what support you are looking for.

As a starting point, print off and have a go at completing the sponsorship opportunities planning template:

★ Novice

Consider how you might attract a club sponsor with their branding on your running top, online and on social media. Or how you could engage multiple local businesses at an introductory level by crediting them as your sponsor of the week or of the meet, again by low-level crediting and exposure. These are ideal ways to start your sponsorship experience: low commitment, multiple sponsors, don't need complicated benefits, great way to try it out.

★★ Intermediate

What goods or services could local businesses offer you instead of cash that would either a) save you cash in planned expenditure or b) help you further the development or the assets of your club? Or, if you don't own your own premises or facilities but do own storage equipment, who might want to sponsor these?

★★★ Expert

Consider what businesses might like to gain access to or get themselves in front of your members. Could you create a sponsorship scheme allowing for a different one of these each week to attend your training sessions or events? Contact with which of these types of business is easy to spot in your network mapping? Why not approach one of the warmest and ask them to become your first? Explain that this is something you're trialling and ask them to get involved – they will like being asked to be 'the chosen one' whose experience and opinions you can use to attract others.

5 |

COMMERCIAL ACTIVITY

Section 5 Commercial Activity

COMMERCIAL ACTIVITY is all about what you own or have access to, that you can “sell” on to others at a profit or that will encourage others to spend more with your club?

If you don't currently have access to anything, what could you purchase but sell on at a profit either via your online channels, on race or meet days, events or at training sessions?

★ Novice

Small items of branded merchandise are great ways of introducing commercial activity at your club. It is also a great way of promoting the club when being used by your members and supporters.

Similarly, a tuck shop, catering or refreshments at training and competitions/race meets is also a good way of creating a social side to the club as well as generating some extra income.

Your ability to increase commercial activity much beyond this will largely be dependent on whether or not you own or have permanent use of any equipment, facilities or premises.

★★ Intermediate

If you are a larger club with premises then room hire, events bookings and bar takings can be one of your most lucrative sources of income, not just from your members but from those hiring the use of the rooms and buildings.

There are benefits and tax relief available to some sports clubs with commercial undertakings, who register to the Community Amateur Sports Club Scheme.

★★★ Expert

For those clubs that already have significant infrastructure, consider selling lunchtime sessions in workplaces for staff wellbeing, providing school out-of-hours and/or holiday clubs.

Within any commercial operation, there are several ‘what if’ questions and circumstances

which need considering. Here are just some of the factors that you should consider before embarking on commercial activity:

- Insurance policies required
- Rental agreements to be drafted and issued
- What happens in case of damage?
- What policies does your club need to keep on top of its governance responsibilities?
- What are your VAT liabilities?
- Do you have a business continuance plan?
- What is your lone worker policy?
- Who are your key holders?

The most important advice is that you seek specific professional advice tailored to your specific club on ALL areas of your operation.

Keeping safe and legal

If you are leasing or hiring out equipment or facilities, employing staff, providing food and or drink, or putting on paid-for events, there will be significant legal, insurance, liability, tax, employment and contractual implications. You need to gain advice specific to your individual club and circumstances to ensure your activity remains safe and legal.

Seek advice from
England Athletics'
partner Muckle PLC

[CLICK HERE](#)

6 |

GRANT FUNDING

Section 6

Grant Funding



THERE are over 8,800 grant-giving bodies in the UK, but if you've never applied for external funding before, the whole process can seem quite daunting.

There is one important element to remember: their purpose is to provide funding. Unlike any of the other potential sources of income covered so far in this guide, in their basest form, grant funders only exist to give money away.

Your ability as a club to access some grant funding will, however, be impacted by your club's legal structure. Some grant funders will only fund

organisations that are official registered charities.

Grant funding is not an easy, quick win income solution. It takes time to research and develop an application and it can take months to find out if you are successful or not.

You should also be aware that there's significant competition for funding. Most grants are heavily over-subscribed and, therefore, only the very best applications have a chance of being successful. You will need to be realistic about whether this is the best income generating channel for your club, particularly whether it's worth the investment in time.

There are five key pillars to successful grant fundraising:

- Creating a compelling case for support for your club and the projects you want to fund
- Identifying who to approach, knowing where to look and how to judge likely interest
- Packaging your activities and plans into projects which are appealing to grant funders
- Having monitoring and evaluation mechanisms in place that adequately measure need and how well you're delivering your intended outcomes
- Having time to do the necessary preparation and relationship-building to be successful



Preparation work is key to making your application(s)

1 PLAN

Having an agreed club development plan helps focus. This does not need to be a lengthy document. But something considered and agreed by your club and committee stating where you are now, where you want to be as a club in three/five years' time, why you want to make that change/growth/diversification and how you plan to get there, are all incredibly useful. The answers to these questions also help define what kind of funding it is you need.

- **Capital**
Funding to buy items of equipment or create/extend/improve buildings and/or physical structures
- **Project**
Funding to enable you to deliver a project to diversify or widen the range of disciplines/ages you cater for, to try something new or to work in partnership with another organisation to deliver something specific
- **Revenue**
Funding to help you maintain or grow your day-to-day activities and to keep the club and its activities accessible and available to those locally

- **Nurturing talent**

Funding specifically to enable and support the development of those who show potential for excellence in their discipline(s)

2 RESEARCH

Once you've got your plan defined and you know what kind(s) of funding you're looking for, next you need to do your research and find those funders that are most likely to be receptive to an application for funding.

Good places to start your research include:

National Lottery Community Fund

[CLICK HERE](#)

The National Lottery's funding programmes change over time. At the time of writing, Awards for All England (small grants programme funding voluntary and community groups, schools and health organisations, parish and town councils between £300 and £10,000) and Reaching Communities (funding projects between £10,000 and £500,000 for up to five years that help people and communities who are most in need) are the two funds most relevant to community-based athletics clubs.

Section 6

Grant Funding

Sport England

[CLICK HERE](#)

Sport England also distributes Lottery Funding but these grants are specifically sport focused. As with the Community Fund, the specific programmes change over time. At the time of writing, the most relevant programmes are the Small Grants fund awards from £300 to £10,000 to not-for-profit organisations to help more people get active, and the Community Asset Fund, dedicated to enhancing the spaces in your local community that give people the opportunity to be active.

County Sport Partnerships

(now Active Partnerships)

[CLICK HERE](#)

There are 45 Active Partnerships covering England. They work across the sporting landscape, actively supporting clubs and partners to increase participation in sport and physical activities. The funding support available varies by partnership but the majority do have some form of funding finder on their website. Find your local Active Partnership by clicking on the link above.

England Athletics Funding

On occasion, funding is made available by England Athletics to affiliated clubs for the advancement of specific programmes and activity. For example, since 2011 the Satellite Clubs programme has provided clubs with the opportunity to apply for a package of support to encourage more young people aged between 14-25 to start or become more physically active through athletics and running. Make sure that your communication preferences are up to date and that you are receiving regular e-comms updates so that you don't miss out.

Community Foundations

[CLICK HERE](#)

There are 46 Community Foundations in the UK who last year made grants totalling £98.3million. To find details of your Community Foundation and its funding guidelines.

Local Authority Grants

Many Local Authorities still make grants for facilities and projects which are of benefit to their local area. Visit your own local authority's website to find out more. Be sure to include Recreation & Leisure, Sport and Facilities and Health & Wellbeing in your research criteria.

Landfill Tax and the Landfill Communities Fund

To encourage Landfill site Operators to re-use, recycle, recover more value from waste and use more environmentally friendly methods of waste disposal, Landfill Tax is charged on each tonne of waste sent to landfill. Landfill Site Operators are able to redirect a small proportion of landfill tax liability (currently 5.3%) to support a wide range of community and environmental projects in the vicinity of their landfill sites through the Landfill Communities Fund. There are a number of distributors of Landfill Tax Community Funds. Many of these will provide funding for: sport or recreation grounds, including pavilions and clubhouses with full public access.

Find out more at [Entrust](#), [Biffa Award](#), [Wren](#), [Veolia](#) and use a search engine to find details of others

Coalfields Regeneration Trust

[CLICK HERE](#)

Their sport for change participation programme (Game on England) which, through direct delivery of sport and physical activity, aims to improve the health, wellbeing and skills of people living in some of our most deprived coalfield communities in England.

Section 6

Grant Funding



Other grant funders

There are many grant funders available to projects in the UK. There are also many funding tools to help you find grants, some of which are free to use and others which have a subscription fee. Don't forget there are many different search criteria and eligibility criteria you can legitimately use: Athletics and individual disciplines, Health & Wellbeing, Fitness & Participation, Community Resources, Demographics, Geography.

Don't ignore the smaller organisations

Local groups such as Rotary clubs, Freemasons, Round Table, Soroptimists, WRVS etc, all often have their own small grant pots to give away. They can be a great place to start with your first application to help you gain confidence. Your local Council for Voluntary Service (CVS) is the place where local voluntary and community organisations speak to each other. Amongst other services, they often administer applications for some small local grantmakers and sometimes also offer funding advice. Many will also help you with any grant applications you want to submit. Your local mayor usually has a chosen charity or cause each year. Speak to your local town hall about how to find out who your next mayor is and how to get your club on their radar.

See the grant finder sources of information for further guidance:

Section 6

Grant Funding

3 READ AND UNDERSTAND EACH GRANTMAKER'S GUIDELINES AND CHECK YOUR ELIGIBILITY

Before deciding to make an application, there are several basic checks that you can make to determine your eligibility:

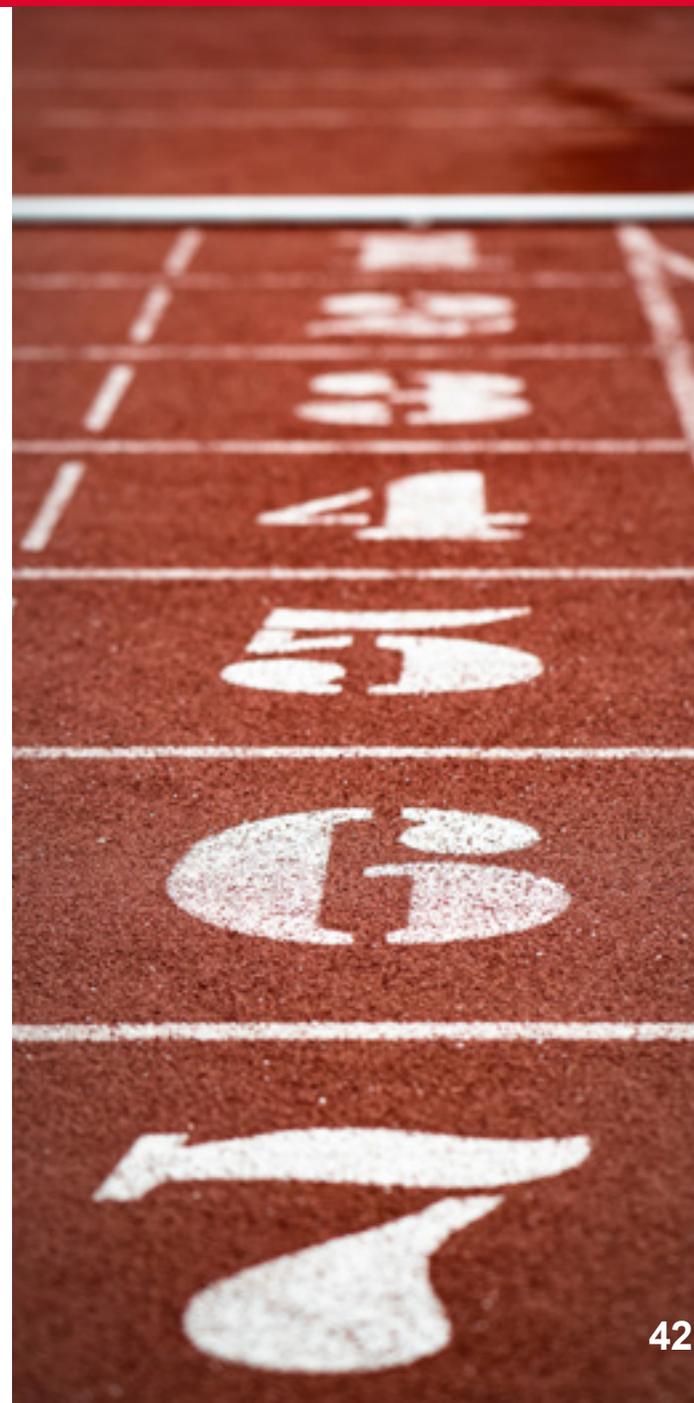
- Geographical coverage for the grant
- Size of their grants
- Size of organisation and financial parameters they will fund within
- Type and structure of organisation they will fund
- Specific areas of interest and activity – check they fund your specific discipline and age category
- Check that no area of your operation is on their exclusion list

Don't be tempted into trying to squeeze yourself into a description that isn't really you and definitely don't decide to change your plan just to fit with a funder's criteria. Work your way through and find the ones that really fit your plan, your culture and your ethos.

Before you start writing your application, make sure that you've read and fully understood all of the guidelines including:

- What does the funder want to know from you?

- What do you need to be able to demonstrate?
- What is their grant size range and how much should you apply for when considered alongside their grant-making history?
- How and when do you need to apply?
- Will they only fund part of your club's activities or do they do everything? Remember most grants typically don't fund day-to-day running costs
- Are there any specific conditions of any grant offered?
- Do they need your application in any specific format?



Section 6

Grant Funding

4 YOUR APPLICATION AND CASE FOR SUPPORT

In many cases (particularly when applying to smaller trusts and foundations), your applications will be simply a one-sided form which you have to fill in and return. The detail you will have teased out in your club plan will usually be enough, along with a clear and simple budget.

However, for larger grants and for those clubs embarking on a much larger capital development project, you are going to need more information – ideally a case for support.

The case for support is the statement of your cause, explaining what your club does, why it's important and, most importantly, why people should support it. It should be inspiring and should tell your club's unique story – one that draws the funder in and never lets them doubt that your cause is the most worthy.

We have provided a guide to creating a case for support with a worked example to help give an idea of the kind of information the larger funders might be looking for.

When writing your application, attention to detail is critical. Follow this simple checklist to make sure you have all the basics covered:

- Read all guidelines and instructions
- Answer the question they've asked, not the one you've already got a tailored answer to
- Answer all parts of all the question
- Make sure your 'why' shines through
- Focus on outcomes not outputs
- Include the organisation's name, charity number and contact
- Be consistent in tone of voice, grammar, first/ third person
- Don't crowd the page. Use case studies, statistics, pictures and quotes to illustrate your point
- Make sure you reflect their criteria and key areas back to them in the application
- Demonstrate how you will look after them and other supporters
- Make sure you can adhere to their reporting requirements and do so
- Show the impact of your project and their part in it

★ Novice

Apply to your local supermarket charity fund or your local CVS for a small one-off grant to gain experience of the grant process.

★★ Intermediate

Have a look at an Awards for All application or a Sport England, Small Grants Fund application and see how near to a full application you can get with the information you already have available to you. Work in a project group to obtain or generate the remaining information and speak to the grantmaker about submitting the application.

★★★ Expert

Use the knowledge and experience you have gained from previous smaller grant applications and make contact with a Landfill Tax credit funder or one of the larger Lottery/Sport England funds and start a conversation with them about your long-term plans and how you can work with them to achieve them.



71

FUNDRAISING



THERE are many different forms of fundraising and money can be given in many ways.

As with all the sections so far, the scale of your success in fundraising will be dependent on the input of your members and, to a certain extent, on your club size, structure and history of fundraising.

To help you to identify the right type of fundraising to pursue for your club, it is easiest to start by understanding that most fundraising products/activities can be grouped into one of five main categories:

- 1 Individuals fundraising
- 2 Events fundraising
- 3 Community fundraising
- 4 Corporate fundraising
- 5 Trust and Foundations fundraising:

Storytelling

Storytelling is also a critical consideration in fundraising. In order for anyone to invest their interest, their time and then their money in your club, they need to know, like and trust you. They need to know your story, who you are, why you exist, who are your members, what do they get out of being part of the club, how does your club fit into and support the local community, and why they should be interested in your continued existence?

- Tell the stories of your members to help attract other new members
- Tell the stories of your supporters and what they've helped you achieve
- Tell the stories of those in the local community who use your facilities and whose lives have been changed by being able to take part in athletics and the impact it has had on their wellbeing
- Tell the stories that will mean something to the specific audience for the specific message

Don't just give one-dimensional historical and factual information. Make it real with the faces, the voices and the stories of others.

Section 7 Fundraising

INDIVIDUALS FUNDRAISING

This is about providing opportunities for your members to make donations to support your club over and above any membership or subscription fees.

Getting donations from individuals is a matter of ensuring you have the right administrative processes in place, identifying the right products for your members, learning the right way to ask and being clear from the outset about what you would do with any donations received.

There are many different types of products to encourage donations by individuals, the main ones are detailed here:

Individuals fundraising – cash ask

Asking your existing members and/or their friends and family to consider making a one-off donation or a regular monthly gift.

There are several different ways that you could make this ask:

- Annual appeal (sent out via your usual communication channels e.g. newsletters)
- Optional donation request at the point of membership renewal
- Online donations via your website or social media platforms such as Facebook

- Online donations via an online fundraising platform such as Just Giving or Virgin Money Giving

Don't forget that community amateur sports clubs and charities are able to claim Gift Aid on all donations from UK taxpayers, which is worth an additional 25p on every £1 donation.

Keeping safe and legal

You will need to have asked members permission to communicate to them about fundraising products/activities, so make sure you check your GDPR statements to ensure that you are acting within the parameters of the law. Visit <https://ico.org.uk/> for further guidance.

The Code of Fundraising Practice from the Fundraising Regulator sets out the standards expected of fundraisers when collecting and processing donations.



CLICK
HERE



Section 7 Fundraising

Individuals fundraising – crowdfunding

Crowdfunding means using websites to organise fundraising campaigns that raise small amounts of money from a large number of people.

Crowdfunding projects come in all shapes and sizes – anyone can set up a campaign and there are many different online crowdfunding platforms that you can use.

How does it work?

Crowdfunding is hard work and is not necessarily an easy win but if you know that you have the networks it can be very successful and can be less time-intensive than other fundraising channels like organising events.

As activity is driven online, it can connect with younger or busier audiences who might not

attend events or respond to more traditional fundraising, but it can also alienate older and less connected communities, so think about whether it works for your prospective donors.

1

First you need a great idea. What is it that you are going to be raising money for?

2

You also need a plan. How are you going to promote your campaign, both online and offline, to ensure its success?

3

Build your team. There is a lot to do and you will need people to help manage the campaign once it's live as you have to be able to respond really fast.

4

Choose a platform. Research what is available now and think about the site that is most suitable for the type of campaign you are launching. Check things like downtime and customer service.

5

Develop your pitch. Tell your story, inspire people with your idea or project, explain the difference it will make and provide as much evidence as possible to show it will work. Complement your text with good video content.

6

Set a target. With a crowdfund you have two options: you can go all or nothing, or keep however much you raise. If you opt for the latter, you need to make sure that you'll raise enough to follow through your project. Be brave but realistic when you set your target.

7

Soft launch. Start with your warm network to build at least 20% of your total target before you go public. You have to be prepared to really chase people. Make sure you have identified specific messages for different audiences as part of your communications plan.

Section 7 Fundraising

Individuals fundraising – raffles and lotteries

Lotteries (also known as raffles) are commonplace in most organised groups. They are an easy and popular way for clubs to fundraise. Lotteries take many different forms and prizes are varied, but all are run with the purpose of raising money for a cause.

They can be a great way to engage with your club members due to the added incentive of them having the chance of winning a prize. They are also a good way to initiate or nurture relationships with local organisations and businesses by asking them to support by donating a prize.

A lottery is a kind of gambling (and is therefore regulated by the Gambling Commission) which has three essential ingredients:

- You have to pay to enter the game
- There is always at least one prize
- Prizes are awarded purely on chance

For legal reasons, the Gambling Act has created eight categories of lottery, each of which has its own dos and don'ts. Make sure you are fully aware of what type of lottery you are planning and abide by any terms as identified by the Gambling Commission.

TYPICAL SMALL-SCALE LOTTERIES

Raffle

Where players buy a ticket with a number on it. The tickets are randomly drawn and those holding the same numbered ticket win a prize.

Sweepstake

Where participants pay to randomly draw the names of a horse in a race (or equivalent).

Tombola

Often found at a funday, fete or coffee morning as part of a wider fundraising event. Prizes are pre-allocated to tickets ending in a specified digit. Players pay for a ticket(s) which they draw at random.

100 Club

Club members subscribe to buy a numbered ticket(s) either weekly or monthly. In total, there are 100 tickets for a 100 Club, 200 for a 200 Club etc which go into a regular draw. At previously agreed intervals, the draw is made – a specified percentage of the money raised are given as the prizes and the remainder goes to club funds.

Guide to setting up your 100 Club:

KEEPING SAFE AND LEGAL

ALL lotteries fall under the terms of the Gambling Act and are regulated by the Gambling Commission. If you are organising a lottery it is your responsibility to ensure you are compliant with the law. If in doubt, you should seek legal advice.

For further guidance:



[CLICK HERE](#)

[Gambling Commission](#)

[CLICK HERE](#)

[The Code of Fundraising Practice](#)



Individuals fundraising – leave a legacy

It's a common misnomer that only the rich leave charitable gifts in their will.

Talking about wills is a sensitive subject, one which we often avoid at all costs but gifts left in wills have created some of the most amazing assets in society and contribute towards a huge proportion of charitable giving each year.

Choosing to leave a gift in a will is very personal and very special decision. People often choose to include a charitable gift in their will to causes they have been touched by in their lifetime – there is no doubt that this could include your club.

Some legacy gifts are entirely unsolicited and unexpected – these are really special gifts to receive. They are commonly left by people who were passionate fans or participants of the cause in their lifetime who want to leave a gift to benefit future generations. Legacy gifts are sometimes referred to as the Ultimate Gift. Simply having a line on your website, or mentioning once a year at an event, about what kind of impact and lasting legacy a gift left to your club in a will would make, is a really simple way to introduce the idea and start the conversation.

Wording for such a request could run along the lines of:

Financial support of our club at any time is gratefully received. We are aware of the impact of this club on the lives of our members and are keen to secure the club's existence and growth for future generations of athletes. A gift left in your will is one way of recognising the impact that the club has had in your own life.

Your loved ones, friends and family are likely to be of utmost priority when writing your will. But just a little of what's left once they've been provided for could go a long way in securing the future of this club for generations to come.

If you're not confident of having this as a standalone section on your website, you could easily include it in a more general fundraising section as one of a number of different ways in which members and supporters can donate to the club and its development.

Section 7 Fundraising

EVENTS FUNDRAISING

Fundraising events are the lifeblood of many not-for-profit groups, although they can take a lot of time and energy to be truly profitable. Many affiliated clubs are already involved in organising major road or multi-terrain running events, which for some form a significant part of the club's income. For club's needing further guidance in this area, England Athletics offer a Gun to Tape workshop, which aims to guide you through what makes for a successful event.

For those clubs familiar with organising events, there may be an

opportunity to diversify your event portfolio and organise some additional events with a focus on fundraising. This is a much easier form of fundraising for clubs with access to their own premises/facilities. There are different types of events that you might want to consider:

1. Special events

This includes events such as dinners, balls, 'an evening with', golf days etc with a specific remit of raising money. Usually the ticket price charged will be more than the cost of attending the event, creating profit purely from sales of tickets. Further income will then be raised via secondary fundraising activities such as raffles, auctions etc. These can be great events if your club is well established or if your membership is largely made up of professionals who are well connected locally. They can also be great for

attracting potential new sponsors and publicly acknowledging and thanking existing sponsors.

2. Sponsored events

Usually an entry fee is charged to cover the costs of running the event and then participants are asked to collect sponsorship for your club. Due to the nature of the club you might find that it is difficult to get members to engage with sponsored events that are too similar in nature to the core activities of the club.

3. Participation/Local events

This includes events such as fashion shows, coffee mornings, fun days, fetes, quiz nights, race nights and car boot sales. These types of events are focused on attracting large numbers of people paying to take part in a branded event. Participation events are particularly popular where they engage children and families. They are a great vehicle for raising the profile and awareness of your club, as well as some low-level income.



Section 7 Fundraising

COMMUNITY FUNDRAISING

This type of fundraising is about mobilising large number of volunteers to raise money on behalf of the club. Right at the heart of community fundraising is the community – your members, volunteers and their families, friends, neighbours and colleagues.

There are many types of community fundraising products/activities. Here are a few of the most popular:

- **Community fundraising – local organisations**

Local organisations such as masonic guilds, Rotary Clubs and Women's Institutes all provide networks of people who can be motivated to raise funds.

It's worth exploring at a local level whether there are any opportunities to work with organisations of this nature for mutual benefit.

- **Community fundraising – collections**

Most non-profits have operated cash collections at some point, recruiting teams of volunteers prepared to collect with a bucket or collecting can in the street, shopping centres, supermarkets, train stations or other public areas, asking for small donations.

Permissions for cash collections must be sought from either the private site owners or the local authority, who will stipulate how long the collections can continue and on the specific positioning of the volunteer collectors.

Collections of this nature are now very competitive and are often booked six to 12 months in advance, so the best advice is to plan well in advance.

- **Community fundraising – bag packing**

Bag packing at supermarkets in exchange for small donations (into a bucket or collection can) has become very popular amongst sports clubs, particularly those with junior sections whereby children and young people can get involved with the fundraising (under adult supervision). Bag packing opportunities are also very popular. Be selective with your dates to ensure that you secure peak times (Fridays, Saturdays and Sundays as well as in the run up to Christmas are usually best).

- **Community fundraising – third party challenge events**

Challenge events arranged and organised by third parties are a great way for your members to raise money for you.



Section 7

Fundraising

They are based on the concept of selecting an event which will significantly challenge them physically or mentally, giving them an opportunity to seek sponsorship in aid of the club.

There are many different types of challenge events, including abseils, parachute jumps, marathons/runs, hikes and overseas events.

You could even get a group from your club to take part in the same challenge and hold a mini competition yourselves as well as raising money.

If your members decide to take part in a third party challenge event to raise money for the club, be prepared for them to ask for support, ideas and advice with regard to collecting sponsorship. Does the club have a preferred online fundraising platform such as JustGiving or Virgin Money Giving? Do you have a simple fundraising pack or even just a sponsorship form that members could use to collect funds offline?

- **Keeping safe and legal**

Guidance on what to do and not to do when undertaking collections is contained within the Fundraising Regulator's Code of Fundraising Practice.

[CLICK HERE](#)



Section 7 Fundraising

- **Community fundraising – in aid of events/ activities**

These are small local events and/or activities which are organised by your members, supporters and volunteers to fundraise within their own networks and communities, such as at home with friends/family or at work with colleagues, but all money raised is 'in aid of' the club.

This can be any type of activity or event and at any scale but is usually something quite straightforward like a cake sale, coffee morning, quiz night, film night, photo competition, dress down day etc.

- **Community fundraising – online fundraising shopping websites**

There has been growth in recent years of online fundraising shopping platforms which help clubs and causes raise money while their members, friends and supporters shop online. This has to be one of the simplest, least-effort ways of raising money but unless you have large numbers using it regularly then the return can be very small.

- **Easyfundraising**

[CLICK HERE](#)

is open to all clubs which have a bank account specifically designated for the club.

- **Amazon Smile**

[CLICK HERE](#)

is one of the largest online fundraising shopping platforms and is open to all clubs registered with the Charity Commission.

Other shopping fundraising platforms include:

[GIVE AS YOU LIVE](#)

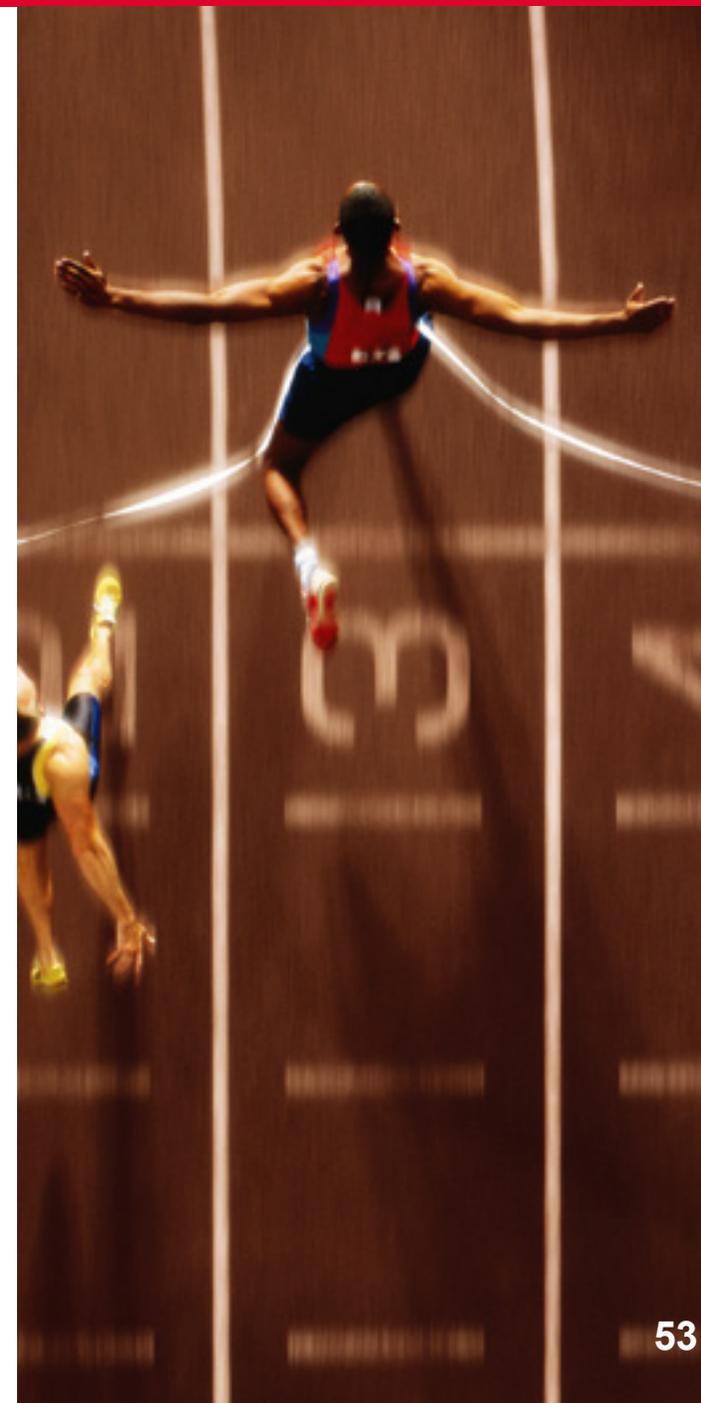
[TOP CASH BACK](#)

- **Community fundraising – recycling initiatives**

Recycling isn't just good for the planet, it's also a way in which many non-profits raise a small amount of additional income.

There are schemes that enable you to raise money from donations of mobile phones, postage stamps, jewellery, used ink cartridges and even unwanted cars (Giveacar).

You can also encourage your members and supporters to use eBay for Charity and donate a percentage or all of the proceeds from the sale of their unwanted goods to your club.





- **Community fundraising – partnership fundraising**

One of the challenges of fundraising locally for your club is the sheer number of competitor clubs, causes and charities that will also be trying to raise funds in the same area from the same people.

One way to increase your visibility and your appeal is to partner up with one of those other causes/charities and work together on a joint fundraising or profile raising project.

Partnership fundraising has the potential benefits for both parties of:

Increasing income, raising profile and awareness, gaining new members, gaining new hirers, additional local media coverage, access to skills and expertise, access to facilities and equipment.

You need to think carefully about what kind of club or cause you would want to be aligned with and for what kind of project. Think about:

- What you can offer
- What kind of club or cause that might be attractive to
- What you would like any partner to offer and what kind of club or cause could provide that

Ideally, you should decide what part of your income generation you want to work on with another cause so that you can make an informed decision.

Any partnership must align and not compete with your club (unless you specifically choose to work with a competitor on a wider running and athletics promotional campaign).

There must be benefits for both sides.

There must be a clear and defined agreement from the outset about who is responsible for doing what.

There must be the same clarity and definition of how money (both income and any expenditure) is going to be split between the partner organisations.

You must check the Fundraising Code of Practice for any regulation that may cover your suggested partnership and fundraising activity.

Section 7 Fundraising

CORPORATE FUNDRAISING

In the [sponsorship](#) section, we looked at the benefits of sponsorship partnerships where the club seeks support from local businesses in exchange for agreed benefits, but there are other ways in which clubs can benefit from corporate support.

Corporate donations

Some local businesses may prefer to offer their support simply by making donations of either cash or goods/services in kind with nothing in return. Corporate donations have tax advantages as companies can pay less Corporation Tax when it gives money to a charity or community amateur sports club (CASC). It is really important that these donors are thanked and looked after, but without any associated branding or commercial benefit.

Charity of the Year (COTY)

Many companies, clubs and organisations choose to support causes locally to them for a 12-month period. There are some opportunities which will only be open to clubs that are structured as formal registered charities. But others are less specific with their remit and consider any worthy local cause within their COTY process. Find out which ones operate locally to you. Use your network mapping to identify who you're already connected

or potentially connected with. Ask in your member communications and/or on social media which companies your members and followers are linked to that have COTY schemes and ask them to help you in nominating your club in their processes. With supermarkets, look out for their charity token schemes as, in many local areas, sports clubs have been successful in applying to these schemes.

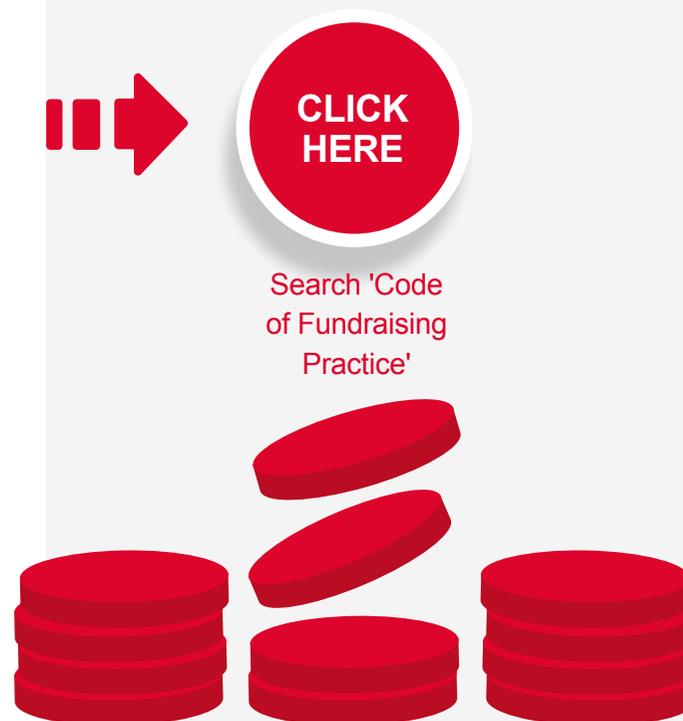
Match funding

Many companies throughout the UK offer employees the chance to boost their fundraising efforts by 'matching' the money they raise. It really is money for nothing and you could double the amount of cash you raise with little effort.

Match funding or match giving is a simple way of maximising the fundraising efforts of your individual volunteers. It is an informal arrangement between a company and their employee. Not all companies offer match funding but those that do will pledge a sum of money relating to the amount their employee has raised to the charity or cause of their choice. Some organisations will match fund on a £ for £ basis, others will stipulate what they are prepared to give. Return to your network mapping and identify whether there may be members at your club that work for an organisation which offers match funding.

Keeping safe and legal

If a business promotes its goods or services on the basis that it will make donations to a charitable institution then they are defined as a Commercial Participator e.g. a mineral water producer who donates 10 pence to a charity for every bottle of water it sells. A Commercial Participator Agreement should be put into place between the charity and the business and an appropriate solicitation statement must be communicated at all times.



8

APPENDIX

DOWNLOADABLE GUIDES & TEMPLATES

SWOT ANALYSIS TEMPLATE

Print off this template and fill out your own SWOT Analysis

Basic SWOT Analysis template

Refer to Chapter 1 of the Fundraising Guide to help you complete this template.

Don't forget to think about the following:

- Membership
- Demographics
- People
- Development plans
- Club culture
- Facilities
- Equipment
- Location
- Current income generation activity
- Resources
- Networks
- Finances

Strengths

Weaknesses

Opportunities

Threats

NETWORK MAPPING TEMPLATE

Instructions

Read through the example given then delete the example data and re-save the document as your template. Have a go at filling it in yourself – it does not need to be as detailed as in the example. Once you’ve had a go at completing it yourself, go through your information and highlight in red those people, connections or opportunities which you think are best aligned with your club’s needs or which would appear to best allow a quick win for your club. You can then share the example document and the blank template with other members of your club or committee and get them to repeat the exercise. Better still, have a night where you all get together and create one network map for your club.



Click the icon to download an Excel version of this template so you can create your own Network Mapping document

Basic network mapping template with examples

	Me	Family	Neighbours	Friends	Education	Colleagues	Outside interests
	Where do I work? Where have I worked before? What locations have I worked in? What influence do I have?	Who is in your family? What job do they do? What geographical area(s) do they live and work in? Where have they worked previously?	Who lives close by to you? Who have you previously lived near?	Who are your friends? Who are their spouses/partners? Where do they live and work?	Your schools, colleges, universities, Your children’s schools, colleges and universities	Where have they previously worked? Who are their spouses/partners?	What else do you do? Who do you know there?
What	Fundraiser, Hospices, Museums, Orchestras, Opera companies, Sight loss charities, Sports charities,	Dad – Safety Equipment Company Owner, Mum – Modern Languages Teacher, Sister – Marketing Assistant, Husband – User Researcher	Builder, Accountant, University Lecturer, Radio Station Controller, Electrician, IT Consultant, Retired	PR Consultant, Charity Consultant, Dietician, Car Sales, Medical Director, Musician, Hospice Chief Exec, Fireman, Steel Sales, Hair & Beauty, Sports, Solicitor, Judge, ITV	Hursthead, Woods Lane, Chethams, Hull Uni	Many other charities, TV production company, Mercedes, Hospital Anaesthetist	Church, Horse riding, Charity volunteer, Charity trustee, France
Where	Manchester, Leeds, Liverpool, Preston, Mid Wales, Buxton	Stockport, Cheadle, Southport, Manchester	Local, Wigan, Bolton, Ireland	Manchester, York, Bolton, Bury, Preston	Cheadle, Manchester, Hull	All over	

APPENDIX

Guides & Templates from Section 2

FORECAST TEMPLATE



Click the icon to download an Excel version of this template so you can create your own Forecast document

	Month 1 £	Month 2 £	Month 3 £	Month 4 £	Month 5 £	Month 6 £	Month 7 £	Month 8 £	Month 9 £	Month 10 £	Month 11 £	Month 12 £	Total £
Income													
Membership fees													
Fundraising activities													
Sporting events													
Grants													
Sponsorship													
Merchandise													
Bar													
Gifts													
Bank interest													
Bar													
Other 1													
Other 2													
Other 3													
Total income													
Expenditure													
Staff wages													
Coach fees													
Rent and service charges													
Utilities													
Insurance													
Repairs													
Marketing													
Travel													
Sporting events													
Bar and merchandising costs													
Sinking fund													
Other 1													
Other 2													
Other 3													
Total expenditure													
Surplus / (deficit)													
Opening cash balance													
Closing cash balance													

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

Club name _____:
Financial Policies and Procedures Manual

1. Key information

Last updated: [date _____]

Key dates

- Accounting year end: [_____]
- Companies House/FCA/Charity Commission annual accounts submission date: [_____]
- Corporation Tax payment date: [_____]
- Tax return filing: [date _____]

Key members of finance staff

- Chairperson:

- Treasurer:

- Secretary:

IT systems used

- Accounting system:

- Payroll system:

- Data storage:

Bank account

- Bank name:

- Branch:

- Address:

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

2. Policies and Procedures

Role of the Treasurer

The Treasurer has responsibility for safe-keeping of the funds of the club. He/she is responsible for recording all income and expenditure and for reporting the club's finances to the club committee.

The Treasurer must not commit the club to any expenditure for which prior approval has not been given and should also be in a position to give ample warning to the club before the club falls into unplanned debt.

The overall role of the treasurer is to:

- Ensure all financial matters within the club are managed correctly and efficiently.
- Ensure proper books of accounts, with appropriate controls and procedures are in place.
- Preparation of annual accounts.

- Preparation of the financial forecast and comparison to actuals.

Forecasting

A 12-month income and expenditure forecast will be prepared by the Treasurer for review by the club committee, before the start of the financial year under consideration. The forecast will be reviewed on a quarterly basis and compared to actual results, with explanations noted for the differences. The forecast will then be adjusted for the next quarter taking the previous quarter's results into consideration.

Financial monitoring

All heads of department (eg. head coach, bar manager, facilities manager) will receive a quarterly report of income and expenditure against the forecast.

The club committee will receive a finance report on a quarterly basis including the

following:

- Management accounts
- Financial forecast versus actual results

The financial report is a standing item on the agenda for the quarterly committee meetings.

The annual accounts reporting schedule is as follows:

- [Date_____]: Final drafts of the annual accounts prepared and circulated to the committee for review and approval.
- [Date_____]: Accounts sent to independent examiner/auditor.
- [Date_____]: Independently examined/audited accounts circulated for the AGM for discussion and approval.
- [Date_____]: Accounts sent to Companies House/FCA/Charity Commission.

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

The tax return will be prepared in conjunction with the annual accounts on the above timelines, and will be filed with HMRC at the same time as the annual accounts are submitted.

The corporation tax payment (if required) will be diarised when the tax return is filed, and paid by [date _____] each year.

Books of account and records

The accounting system used is _____, and the paper records files are kept at the club office in a secure location.

Income and expenditure information will be recorded in the accounting system on a weekly basis.

Petty cash and bank accounts are reconciled monthly.

Electronic records, such as purchase invoices received via email, will be filed in

the data storage system in the appropriate folder. All hard copy records, such as petty cash vouchers, cheque stubs etc. will be retained for accountability purposes and for statutory purposes thereafter i.e. independent examination.

All fixed assets costing more than £1,000 (or such other level as may from time to time be agreed by the committee) will be capitalised in the accounts and recorded in a fixed assets register.

This register will record details of date of purchase, supplier, cost, serial no. where applicable, description and in due course details of disposal. An estimate of useful economic life should also be made and the asset then depreciated accordingly. The register will be reconciled to the accounting system on a quarterly basis.

Bank accounts

The authorised signatories on the bank

mandate are the Chairperson, Treasurer and Secretary. Two signatures are required for all actions as per the bank mandate.

Any two users can set up and authorise payments on the online banking system or by cheques. Every payment set up has to be authorised by a second user. Three signatories are required for payments over £_____.

There are to be no blank cheques written and cheques are not to be pre-signed.

A bank reconciliation is required on a monthly basis for each account. This will ensure all transactions are captured in the accounting system and any unknown transactions are queried as soon as possible.

Banking and custody procedures

Incoming receipts are banked on a weekly basis and recorded in the accounting system. Cash or cheques that are held in at the club must be placed in the safe.

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

All incoming money will be banked in its entirety – no amounts are held back for "feeding" petty cash.

All club monies should be held separately from any other monies. For example the club Treasurer must not use his own bank accounts for the organisation's finances.

Where possible, two people should pay in money to the bank for safety, particularly if sums of cash over £500 are involved.

No counting of cash or preparation of paying in slips are to be carried out independently – at least two persons must be present.

Handling of cash

Petty cash float

Petty cash will be topped up on the 'imprest' system, where the amount spent is reimbursed. It is intended for small items, up to £100. Anything over this should be paid by

online bank transfer or cheque where possible. The imprest has a balance limit of £200. The petty cash balance will be reconciled when restoring the imprest balance, or monthly if this is more frequent.

All cash collected from the Treasurer will be signed for, and receipts will be issued for all cash returned. Specific extra cash floats (for events etc.) should be arranged with the Treasurer. The person signing for the float is responsible for ensuring cash and receipts are returned as soon as possible after the event etc. No further floats may be issued to that person, or another person in the same department for a similar purpose, unless the previous float has been accounted for.

Mixing money or receipts from different petty cash sources creates large accounting problems. In a real emergency, where another cash float has to be used for something, a clear record must be kept, and brought to the Treasurer's attention.

Accounting for cash as it is received

Cash received in person is recorded on a pre-numbered multiple-copy receipt form. Give a copy of the receipt to the customer.

Individual cash handling duties

The components of cash handling, and the people responsible, are as follows:

- Collecting:

- Depositing:

- Reconciling:

These components are separated so that one individual does not have responsibility for more than one component.

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

Safeguarding the handling and storing of cash

- During hours of operation, coins, currency and cheques are secured at

to restrict access.

- At other times all coins, currency and cheques are stored in the Club safe until they are deposited.

Depositing cash promptly

- Cash receipts are deposited at least weekly or when the total on hand reaches £500.
- All funds received are deposited. Do not make refunds, pay expenditure, or create a change fund from cash receipts. Do not hold cheques for future processing. Do not use cash receipts to cash cheques.

Reconciliations

Monthly checks are made to ensure:

- Records of cash and cheques received agree with bank paying-in slips or counter foils.
- Counter foils or paying-in slips agree with the bank statements, both in terms of amount banked and date of credit.

Any unidentified differences will be documented and investigated.

Monitoring the cash receipts process

Members of the club committee not directly involved with the cash receipt process have the responsibility to periodically:

- Review reconciliations, and the nature and extent of differences.
- Compare actual deposits recorded with expected receipts.
- Evaluate overall internal controls to ensure that reasonable controls exist to safeguard

cash, and that committee members understand and follow them.

- Reviews should be documented. Any issues noted should be raised with the Chairperson for further investigation.

Income

Club income is categorised into the following main sources:

. Incoming cash and cheques should be recorded in the 'Cash Receipts' workbook and should be promptly paid in according to the banking procedures outlined above. All invoices should be raised on club headed paper in a consistent format agreed by the committee and should be sequentially numbered. Information about non-routine and all grant income must be passed to the Treasurer with the cheque or remittance advice. This should be filed by the Treasurer for reference, and used to ensure such income is correctly recorded in the accounts and grant conditions etc. noted. Lack of documentation will lead to such items being 'held on suspense'.

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

It is the responsibility of the person gaining the grant to ensure all grant income is claimed as it becomes due or available, and that all appropriate staff and the committee are aware of relevant grant conditions and exactly how the grant is to be expended.

Club events

The club may from time to time run various events and it is essential that proper records are maintained:

- Individual records should be maintained for each event, in sufficient detail to identify gross receipts and how they have arisen, and all costs incurred.
- A report given to the committee on how the event performed in financial terms.
- For any event in which there is ticket income or gate money:
 - All tickets should be prenumbered;
 - A record kept of all persons who have been allocated tickets, and the numbers of tickets allocated to each;

- A record kept of tickets sold; and
- A reconciliation carried out showing tickets sold versus actual amounts received.

Ordering supplies and services

Committee members must be aware that expenditure is committed when an order is placed on behalf of the club not when the payment is requested. It is important that orders are approved and tendered according to the following table:

Estimated Value £	Approvals Required	Tender Action Required
£0 to £1,000	Treasurer and Chairperson/ Secretary	No quote required
£1,000 to £3,000	Treasurer, Chairperson and Secretary	No quote required
£3,001 to £10,000	Full Committee	Two written quotations
£10,000 and above	Full Committee	Three written quotations

Any lease, hire purchase agreement or other contract involving expenditure will be subject to the same authorisation procedure as above, with the appropriate expenditure amount being the total committed expenditure over the period of the contract, or where the contract is open-ended, over the first 12 months of the contract. Larger contracts should not be entered into without adequate advice from a relevant professional adviser (e.g. accountant, solicitor, surveyor).

Purchase Ledger

A Purchase Ledger is to be operated by the treasurer. All incoming invoices are to be passed to the Treasurer as soon as they arrive. Invoices will be recorded on to the Purchase Ledger within regularly. Invoices should be paid when due however cashflow should be considered.

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

Expense reclaims*Overview*

The club wants to ensure that staff and volunteers are not out of pocket for the work they do for us, while also looking to get the best use of limited funds.

HM Revenue & Customs expenses and benefits rules recognise that reimbursement of standard business expenses (such as travel) are not taxable. The club's policy is guided by these rules and we do not pay expenses that will give rise to tax or National Insurance.

Any amounts claimed must be for actual costs incurred by staff or volunteers 'wholly, exclusively and necessarily in the performance of the duties of their employment', and that adequate records are submitted with each claim.

General rules

Expenditure incurred by staff and volunteers should be necessary to achieve our goals and represent good value.

Each staff member is responsible for familiarising themselves with these rules and understanding the limits of their authority, as the club may not reimburse any expenses considered unreasonable or outside this guidance.

All expenses should be itemised, with supporting receipts attached on a claim form. Expenses with no supporting receipt require a signed letter by the staff member explaining the purpose of the expense and the reason why a receipt is not provided. The club may decline to reimburse an expense claimed with no supporting receipt.

Eligible expenses

The specific rules for eligible expenses that may be claimed by staff are listed and described below:

- Public transport fares
- Use of personal vehicles
- Taxis
- Subsistence

Public transport fares

Expenses associated with public transport such as trains, buses and underground are eligible for expenses claims. Staff and volunteers are asked to make use of any special reduced fare arrangements, such as cheap day and period returns, where possible.

EXAMPLE POLICIES AND PROCEDURES

Print off this template and fill out your own example Policies and Procedures document

Use of personal vehicle

Staff and volunteers may use their own vehicles for club travel if they wish, at their own risk, when public transport is not possible or when public transport will take significantly longer than private travel. Where practicable they should travel together to minimise costs.

Anyone using his or her vehicle for club purposes must have a full UK driving licence, the vehicle must have an in-date MOT certificate, be fully taxed and insured for business use. A mileage allowance may be claimed by staff and volunteers using their own vehicle for business travel.

Current mileage allowance rates are as follows:

Car or van	45p per mile (up to [10,000 miles, 25p thereafter)
Motorcycle	24p per mile
Bikes	20p per mile

Parking fees, congestion charges and toll charges will be met by the club, but not parking fines.

Taxis

The cost of travel by taxi will be reimbursed in the following circumstances:

- There is no reasonable or practical alternative to getting to the destination.
- The staff member or volunteer has been required to work so early or late, that public transport is not reliably available, or the individual's safety is compromised.
- A 'heavy load' is being transported, which would be unreasonable to carry on public transport.
- The individual has a disability such that public transport is not appropriate.

The reason why the staff member or volunteer has chosen to travel by taxi must be described in the expenses claim form, and a receipt provided showing the date, place of departure and destination.

Subsistence

The reasonable cost of meals purchased while staff or volunteers are working at a temporary workplace or while travelling within the UK and abroad will be reimbursed by the club. Please note that the costs of buying meals for colleagues (other than when both parties are travelling on club business) may not be claimed.

Making claims

- All claims for travel and subsistence expenses, from staff and volunteers, must be completed on the appropriate form.
- Claims by staff and volunteers should be authorised by the appropriate line manager, or, for the Chairperson.
- Claims should be submitted monthly or, may be submitted more frequently if the total claim has reached £100.

MEMBERSHIP FEES PLANNING TEMPLATE



Click the icon to download on Excel version of this template so you can create your own Membership Fees Planning document

1	Cost	Number/ Frequency	Total
Income			
Annual Membership Fees	20	26	520
Weekly Fees	5	48 weeks x 26 members	6,240
Total Membership Income			6,760
Expenditure			
Rent	£30 per week	52 weeks	1,560
Insurance	400	Per year	400
Coaching Fees	50	48 weeks	2,400
Running Vests	10	30 vests	300
Website	150	Per year	150
England Athletics Affilitate Fees	150	Per year	150
Bank Charges	5	Per month	60
Book Keeping	15	Per month	180
Total Expenditure			5,200
Current Net Profit/Loss			1,560

Instructions 1

Please delete the data and complete with your own information.

Use your own club's current position, numbers, costs etc to ascertain your current position.

If you're covering your existing costs, consider how much your costs increase by each year and think about how you will cover these increases. Then move to step two.

If you're not covering your existing costs, save the sheet you have created and then use the formulas built in to the spreadsheet to work out how many new members you need to find or how much you need to increase your fees by (or both) in order to break even. Then save this with a different name and discuss with your fellow committee/club members. Financial security is really important and your members and club management need to know and understand the situation. Then when you're ready to, move on to step two.

MEMBERSHIP FEES PLANNING TEMPLATE



Click the icon to download on Excel version of this template so you can create your own Membership Fees Planning document

2	Cost	Number/ Frequency	Total
Planned Future Annual Expenditure			
Cones	4	20	72
Night Lighting	14	30	419
Gazebo	120	1	120
Drinks Station and Supplies	400	1	400
Time Token System	2,499	1	2,499
Total Planned Expenditure			3,510
Planned Exp Shortfall			-1,950

Instructions 2

Please delete the data and complete with your own information.

Fill in the sections about future plans and aspirations and work out how you could achieve them. Also include in here price increases year on year and how you will cope with them.

How could we find this?			
Membership fee increase	Shortfall is £1950	26 members would each need to contribute an additional	75
Find new members	Annual Membership income per member is £260	Shortfall of £1950/£260 means finding new members in the number of	8

SPONSORSHIP AGREEMENT TEMPLATE

Print off this template and fill out your own Sponsorship Agreement document

Garstang Running Club
SPONSORSHIP AGREEMENT

Business name:

Agreed use of business name & branding:

Contact name & details:

Date of expected payment/in-kind receipt:

Club contact name & details:

Review meeting date:

Description of relationship & period covered:

Charity representative name:

Club commitment:

Signature:

Date:

Business commitment:

Business Representative Name:

Benefits offered :

Signature:

Date:

Agreed use of club name & branding:

SPONSORSHIP AGREEMENT TEMPLATE

Print off this template and fill out your own Sponsorship Agreement document

Garstang Running Club

BUSINESS PARTNERSHIP CHECKLIST

(Internal document)

	Requirement (N/Y – what?)	Who?	When?
Press Release			
Social Media			
Website			
Club Access			
Discounts			
Member Access			
Specific Event			
New Kit			
New Equipment			
Printing			
Tickets			
Coaching/Expertise			
Taster sessions			

Look out for opportunities for:

- On-boarding
- New corporate sign-ups
- New expertise
- New member sign-ups
- Grants
- Publicity & Promotion

SPONSORSHIP OPPORTUNITIES PLANNING TEMPLATE

Print off this template and fill out your own Sponsorship Opportunities document

Sponsorship Opportunities planning template

What do we have that is sponsorable?	Existing/Now	Possible/Future	Value?
Kit			
Equipment			
Buildings			
Races/Meets			
Competitions			
Events			
Other			

Now compare this document with your network mapping document – who do you know, or who do you have access to, that might be interested in the opportunities you have and/or who can supply any of the items on your need list.

SPONSORSHIP OPPORTUNITIES PLANNING TEMPLATE

Print off this template and fill out your own Sponsorship Opportunities document

Sponsorship Opportunities planning template

What do we have to offer?	Existing/Now	Possible/Future	Value?
Access to people			
Contactable database			
Website reach			
Social media reach			
Newsletter			
Equipment			
Skills			
Staff volunteering opportunities			
Other			

Now compare this document with your network mapping document – who do you know, or who do you have access to, that might be interested in the opportunities you have and/or who can supply any of the items on your need list.

SPONSORSHIP OPPORTUNITIES PLANNING TEMPLATE

Print off this template and fill out your own Sponsorship Opportunities document

Sponsorship Opportunities planning template			
What do we need?	Existing/Now	Possible/Future	Value?
Cash			
Expertise			
Time			
Services			
Products			
Other			

Now compare this document with your network mapping document – who do you know, or who do you have access to, that might be interested in the opportunities you have and/or who can supply any of the items on your need list.

GRANT FINDER – SOURCES OF INFORMATION

GRANT FINDER – SOURCES OF INFORMATION

Free of charge

- Other club/athletics charity websites
- Charity Commission website (use the advanced search tool)
<https://www.gov.uk/government/organisations/charity-commission>
- NCVO Funding Central (free for organisations with income under £100k)
www.fundingcentral.org.uk
- UK Community Foundations – find your local one
www.ukcommunityfoundations.org
- DSC Funds Online – free to access for those who physically go to the DSC office to access
- Grant Nav <http://grantnav.threesixtygiving.org/>
- National Lottery www.tnlcommunityfund.org.uk/funding/programmes
- Sport England www.sportengland.org/funding
- Active Partnerships www.activepartnerships.org
- My Community
www.mycommunity.org.uk/funding-options/raising-finance-options/grants/
- Wellcome www.wellcome.ac.uk/funding
- Turn to Us – lists grants available for individuals www.turn2us.org.uk
- Charity Excellence Framework – is a free online resource with trust funders as well as many other useful resources www.charityexcellence.co.uk
- Best of the Web – has a list of links to some of the UK's largest grant makers
<https://botw.org.uk/Society/Philanthropy/Organisations/Fundraising/Grants/>

Paid for

- DSC FundsOnline (used to be TrustFunding) <https://fundsonline.org.uk/>
- DSC Directory of Grant Making Trusts (publication)
- Grants Online www.grantsonline.org.uk
- GrantFinder <https://grantfinder.co.uk/faqs/>
- Funding Central (for organisations over £100k) www.fundingcentral.org.uk
- Funding Information www.fundinginformation.org
- GRIN www.grin.coop/
- Invisible Grantmakers (a list of some the lesser known and therefore lesser applied to trusts <https://www.socialpartnershipmarketing.co.uk/publications/invisible-grantmakers-2020/>)



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THE SITE**

CASE FOR SUPPORT

Print off this Case for Support to use as a handy guide

Template: Case for Support document

Page 1 of 5

Creating your Case for Support

A Case for Support is a means by which you can explain why your club exists, what 'good' it does, and why people should support it. While this is a useful exercise for any club to undertake, it is of particular relevance to those clubs who are seeking grant funding as it will help in the writing of your application.

In a nutshell, a Case for Support will help you articulate:

- Who you are as a club and why you exist.
What is the status and nature of your club? What disciplines do you cater for? Who are your members? What age do

you cater for? How long have you been in existence? What geographical area do you serve? What is the demographic of that area? What is your future vision for the club?

- Why you need money and who will benefit when that need is met?
What do you need the money for specifically? Why do you need it? What will you do with it? Which part of your club's current or future vision will this benefit? What group of members/users will it benefit and how?
- What evidence is there of that need?
How has this need come about?

How can you prove it exists? How have you measured/estimated the scale of the need? What impact has this need had on the club and its members to date?

- How is your club equipped to tackle and address that need? What track record do you have in delivering other modifications/developments/projects? If there is anyone else in your area who could take on the work, why should it be you? If not, state that there is only your club that could deliver the project. How/who have you got the resource to manage the proposed course of action and how will your members be involved? (If appropriate – Why is this

outside of your regular funding/income resources?)

- What will be the benefits of your action if you get the funding you're seeking
Who will benefit and what will the impact be on them? How will that have a knock-on effect on the life of your club? What will the ongoing benefits be? Will it help attract new members or new growth to the club? Are you able to estimate the number of beneficiaries in a given period? How long will the benefits be felt for?
- What won't happen/what will be the negatives if you aren't able to take the action/don't get the funding?

CASE FOR SUPPORT

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Template: Case for Support document

Page 2 of 5

What (if anything) can you afford to do on your own without additional funding? How long will the item/service of need be sustainable for before it becomes completely unfeasible, if at all? What impact will this cessation/lack of provision/lack of growth have on the rest of the club? How sustainable are your finances with out it? Will it cause a reduction in new members? Will it cause existing members to leave? What will be the overall impact on the club as a whole?

ROYSTON VAISEY ATHLETICS CLUB WORKED EXAMPLE

Who you are as a club and why do you exist...

Royston Vaisey Athletics club is a competitive track and field athletic club with over 300 adult and child members from all different backgrounds. 70% of the club's members are aged between 10 and 18. Athletes compete in a large range of indoor and outdoor events including track and field, cross country, road races, sports hall athletics, triathlons and park runs. The club is active 52 weeks a year.

Royston Vaisey has a population of 180,000 people. Whilst there are pockets of wealth, there are also pockets of significant deprivation

and there is a significant Asian population living on the doorstep of the club and its facilities.

The club co-owns facilities with Royston Vaisey Council, comprising a clubhouse with kitchen and small bar, a six-lane floodlit track, throwing and jumping discipline areas, changing rooms, toilets and shower. It also owns junior foam hammers, shot putts, javelins and mini hurdles. The club is aware of the current under-use of its great facilities and wants to a) increase participation in athletics as a form of exercise by all age groups and by a broader range of those living in the local community; and b) continue to develop and nurture the talents of those who want to engage competitively and potentially professionally.

Why you need money and who will benefit when that need is met?

The club wants to make sure that barriers (perceived and physical) to engagement and participant are minimised and that more local people are willing and able to visit, use and join the club. It therefore needs to upgrade some facilities to ensure inclusion and accessibility for all. In particular, the club has identified the need to:

Upgrade its running track to prevent potential injury from defects in the now old track surface and to ensure it continues to meet standards so that competitions continue to be held at the club.

CASE FOR SUPPORT

Print off this Case for Support to use as a handy guide

Template: Case for Support document

Page 3 of 5

This helps ongoing usability for all current and potential club members, reduces risk of injury AND ensures sustainability and viability of one source of income in the hosting of regional and national competitions.

Upgrade access to and around the club and the track so as to make it fully accessible to wheelchair users and wheelchair athletes – this will help make the club fully accessible to a group of people who by the nature of the sport, might automatically consider themselves unable to attend or participate. Helping all local people gain access to the club and its facilities, and the natural health benefits that participation brings is of huge importance to the club. Upgrade the clubhouse facilities,

making it more appealing and usable and therefore improving the club's ability to generate it's own income and to provide classroom/workshop space so that the local college and schools can use the facilities for their sporting and wellbeing courses. Growing income through increased usage of the club, room hire, facilities hire and the knock-on potential for new members is really important to the club's on-going financial health and sustainability

What evidence is there of that need?

In the past 12 months, the surface of the running track has really started to perish. The track was last resurfaced in 2006.

Spot repairs have been made where possible but it is now in such a condition that it is close to becoming more repair than track. On one occasion, a training session had to be relocated when one fault in the surface had been repaired the same day but was not ready to be used. We don't want this to happen any more often. Wholesale resurfacing is now needed to ensure the safety of our members and visiting users and to sustain our facility quality to the standards needed to host athletics competitions.

Locally there are a growing number of wheelchair basketball clubs, which have been very successful in attracting members. There is a well-established

wheelchair athletics programme nationally and the club wants to make opportunities available in Royston Vaisey for as many wheelchair users as possible to use and become members at the club and take part in athletic sports.

Hire and rental of the clubhouse and facilities have started to reduce over an 18-month period. Feedback from users during that period and from those who have chosen not to use the facility, has highlighted some issues which need addressing in order to make the club an attractive and viable (and profitable!) proposition once more.

CASE FOR SUPPORT

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Template: Case for Support document

Page 4 of 5

How is your club equipped to tackle and address that need?

Royston Vaisey Athletics club has existed for over 30 years. In that time, the club has grown from a group of runners using a school running track to a membership of over 300 children and adults, facilities of its own, and regular engagement and participation by local school and community groups and with groups targeting the disadvantaged, those at risk of loneliness and isolation, those at risk of health and wellbeing concerns, and those at risk of exclusion from education and training.

The club has undertaken three previous improvement

programmes, the most recent of which was delivered on time and slightly under budget. The club members are a well-organised group who all understand and contribute to the need for profile raising and fundraising.

The club is keen to become more accessible, better at supporting its local communities, more able to nurture the talents of its competitive members and more in control of the sustainability of its finances.

What will be the benefits of your action if you get the funding you're seeking?

The running track repairs will render the facility back to perfect condition and will be of benefit to

potentially 156,000 people over a 10-year life span.

Three-hundred users per week – 200 club members during coaching sessions plus 3 x 35 community group users per week. It will also help retain the club's competition venue status and will thus continue to attract elite athletes to its ranks.

The wheelchair facilities and improvements will make the club and its facilities fully accessible. We do not yet know what demand for this facility will be – only time will tell. But what we do know is that while we don't have any provision and our facilities are not fully accessible, we are creating unnecessary barriers to a sector

of potential users who would benefit hugely from adequate provision. We also know that other wheelchair sport provision close by has been very well received and participation is still growing. Financial sustainability is of huge concern to all athletics clubs, regardless of their size. Royston Vaisey club is proud of its standing and reputation in the local community and of its support from members, neighbours and local businesses. It is important to us as a club to be an integral part of and facility for our local community and we are concerned by the recent decline in hire and usage. Hire and income therefrom has been down 20% in the last year and was down 10% the previous year.

CASE FOR SUPPORT

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Template: Case for Support document

Page 5 of 5

This is not a trend we want nor can afford to continue. With the suggested improvements made, we estimate that room and facility hire will be back to pre-decline levels within three months of completion, and with our planned marketing and promotion activity and new potential health and wellbeing audience, we aim to be at a 20% increase within 12 months and will then continue to grow that on an annual basis.

What won't happen/what will be the negatives if you aren't able to take the action/don't get the funding?

Without attention, the running track is going to start causing significant problems. At best,

the track will have to be used differently and will still worsen over time, and at worst, it will be the cause of an accident or injury. Loss of the facility's status as a competition venue will have a knock-on effect on income, on usage, on club and individual rankings and on the appeal of the club to the competing and elite athlete members, who would inevitably move clubs.

Lack of wheelchair and other accessibility provision will hamper our aim to become accessible to and used by a broader range of people within our local community. It will also mean provision for those who are disabled or have accessibility issues will remain restricted and will not allow our

expansion plans specifically for disability sports in the area. This will leave an already excluded and marginalised group still marginalised.

Lack of investment in and development of our clubhouse facilities will have a significant impact on our earned income and our financial sustainability. It will also hamper our efforts to be used and inclusive. A status quo situation will not mean usage remains the same – it will become less and less used over time, further impacting on use and income.

In isolation, anyone of these is bad news for the club, its members and its local community.

Combined and it seriously jeopardises the future of the club in its existing form.

STEP-BY-STEP GUIDE – SETTING UP YOUR 100 CLUB

Print off and keep this template as a guide when setting up your own 100 Club

Before doing anything, read the Gambling Commission Guide to Running a Lottery.



**CLICK
HERE**

1 Decide how you want to run the club:

- Just members involved, tickets sold only on the club's official premises (as defined in your constitution) = Private Lottery
- Sell to anyone aged 16 or over = Small Society Lottery (requires registration with your local licensing authority)

2 Get an idea of how many numbers you're likely to be able to sell – thus agree on 50 Club/100 Club/200 Club etc

3 Agree:

- How much you are going to charge
- How often you are going to run the draw
- How you are going to split the prize pot
- What the minimum time commitment for players is
- How you will accept payment

4 Draw up a set of club rules so that participants know:

- How the club will work
- What is expected of them and when
- Their draw number(s)
- How winners will be notified
- What happens if payment isn't received
- How the total draw fund is split
- When, where and how the draw will be made (it is best if the draw is made in public for proof of transparency)

5 Create a list or spreadsheet with the participant names and their number(s),

including their payment details, payment history and contact method

6 Buy or create sturdy cards or balls with all of your participants' numbers. Make your draw in the agreed place on the agreed date, in line with your 100 Club rules

The choice you made in Step One will determine how your 100 Club will run, but also the advertising of it. Check on the relevant section of the Gambling Commission website to see where, when and how you are able to promote your 100 Club and to who.

STORYTELLING FOR FUNDRAISING

Print off and keep this template as a guide when creating your own fundraising story

Telling your story is just as important in trying to engage your friends and family in your fundraising as it is in engaging the support of local businesses and grant funders. Think less “Goldilocks and the Three Bears” and more “why did I get involved in this club and why might others also want to do so?”

The process

- 1 Define your audience**
Go through and list all of the different groups of people you want to communicate with and give them basic personas – who are they, what are their interests?
- 2 Set your intentions**
Purpose behind telling the stories – what point, issue, problem, challenge, new service, success or other instance do you want the story to convey
- 3 Tell people your WHY** – why do you need to make this change? What will happen/not happen if you don't?
- 4 Tell the right story at the right time**
Don't tell it too soon, before you have a conclusion or resolution. Don't wait too long and have someone else take all the glory
- 5 Pick a peach of a story**
Pick the juiciest story for the particular audience. Same story won't be the right story for different audiences
- 6 Define the club's role in the story**
Don't miss the opportunity to highlight the impact of your involvement in what went on
- 7 Craft your story well**
Grab attention and arouse curiosity, build tension, resolve the story, reinforce the message/call to action

- 8 Engage people on the level they will be interested**
Make sure you use the power of the mirroring to reinforce your message – how do you want to make the audience feel? Show that that emotion
- 9 Test the story out**
Try it out on someone you know before trying it out for real



STORYTELLING FOR FUNDRAISING

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Storytelling task

- Who do you want to engage with?
(list them: new members, businesses, grant funders, hirers)
- Why might we be interesting to them?
(want to get fit, want to run, just moved to the area, want to build business presence, local business supports other local causes, neighbour, funds grassroots sports, those looking to hire rooms; weddings, birthdays, funerals, meetings etc)
- What are the common obstacles to these groups getting involved? (Lack of awareness, think you're all Olympic athletes, don't know you're looking for support/what you offer, grant funders don't usually approach clubs)
- Look at the above and think of one story (quotable example) for each that you can tell that will help overcome that obstacle
- How/where can we share that story so that the intended audience sees it? Where will you 'find' this audience? Where can they find you?
- Example – Attracting new members

Non-storytelling method

Royston Vaisey Running Club is on the lookout for new members. The club has been in existence for 17 years and welcome runners of all ages and abilities. We have about 60 members in total, with training for beginners to fell runners and everything in between. Meet Thursday evenings 7pm at Vaisey Park. All welcome – no obligation.

Storytelling method

Steve Miller, member of Royston Vaisey Running Club, and Planning Officer at Royston Vaisey Council, wins the Lucas Town 10k. Steve, 33, of Mirfield Drive, smashed his own personal best and won last weekend's 10k race. But he hasn't always been a runner. Three years ago, encouraged by his friend Ben, Steve joined the Royston Vaisey Running Club. "When Ben asked me, I laughed. I imagined the club to be full of lycra-clad Olympic athletes but Ben persuaded me to give it a try. And I loved it. I joined the

Couch to 5k session and Ryan, the coach, was brilliant. He pushed me just enough to make me try but not too much that I didn't want to go back. I also really enjoyed the social aspect of the club. We go out after training on Thursday night."

Within six months Steve was training three nights a week and within 12 months, he started competing in the weekend meets. "I can't believe the difference in myself. I've lost weight, I've got loads of energy, I'm less sluggish and lethargic at work and I feel great. Winning the 10k has been a real achievement for me."

Royston Vaisey Running Club is on the lookout for new members. So, if you're like Steve was three years ago and would love to have a go but not feel intimidated or unfit, come along to our Couch to 5k starter group at 6.30 this Thursday and see how you like it.

For more information or to chat online with Steve or one of our other Couch to 5k trainees, go to our Facebook page.