

8. Fund Raising Process

The following process is to be followed by the Fund-Raising Coordinator and the Fund-Raising Team leaders. This process has been developed and refined to ensure as best as is possible a smooth fund-raising event and that the efforts provided accrue the best return on the investment.

The process is designed to ensure we can enhance the fund-raising opportunity as the operation has grown considerably over the years and now, we need to separate a few duties to ease the individual workloads and detail ordering processes to reduce wastage/loss.

Preparation Phase

Fund-Raising Coordinator:

Make tentative booking dates with venue/location coordinators/controllers/centre management for ANZAC Day and Remembrance Day.

Sites:

For ANZAC and Remembrance Day- Plan towards the following sites dependent on team leader availability:

- Coles, Benowa Village
- Woolworths Oxenford
- Woolworths Pacific Pines
- Pimpama City Shopping Centre
- Bunnings Oxenford and Pimpama
- Helensvale Plaza

2 Up (ANZAC Day only)

The Sub-Branch may permit the playing of 2up at venues and where provided the Fund-Raising Coordinator will be included in the correspondence between the Sub-Branch and the venue manager. This allows contact to be established to provide donation tins, poppies and/or other support towards the fund-raising activities.

Possible venues are:

- Club Helensvale/Club Robina
- Coomera Lodge
- Harrigans Calypso Bay
- Boat House Tavern
- Coomera Tavern
- Harbourvue Tavern

- Oxenford Tavern
- Pacific Pines Tavern
- Pimpama Tavern
- The Club, Parkwood
- Shearers Arms
- Jacobs Well Bayside
- Dublin Docks

Schools – (ANZAC Day only and on consignment)

Schools merchandise (poppies) must be supplied with a (Stock List) detailing quantities provided & price per item.

The Sub-Branch should be prepared to supply merchandise to the following schools:

- Upper Coomera State College (UCSC)
- Coomera State School
- A.B. Paterson College

Schools – (Remembrance Day only and on consignment)

Schools merchandise (poppies) must be supplied with a (Stock List) detailing quantities provided & price per item.

The Sub-Branch should be prepared to supply merchandise to the following schools:

- A.B. Paterson College

Unmanned (Trays at registers): (on consignment)

The Fund-raising Coordinator is to ensure a Stock List detailing quantities per site is developed and on closure reconciled, no invoice is required only trays of poppies and donation tin (e.g. Taverns, cafes, newsagents, bottle shops).

- Supply copies of the RSL Insurance Policy and any other documentation they request.
- Sign lease agreements

Stock Ordering Process

- Obtain the catalogues from suppliers and compile the Master Spreadsheets with merchandise names and where provided, merchandise identification numbers.
- Everyone needs to be mindful of outlay costs and where possible limit the number of lines of merchandise so we are not left with large quantities of unsold items.
- Suppliers are to be selected carefully to ensure the Sub-Branch can maximise the return per item purchased. The following are the preferred vendors:
 - Military Shop - is to be the primary supplier for **all** merchandise.
 - ANZAC Day Commemoration Committee (Queensland) Inc

- Advise the Committee at the earliest opportunity, the expected outlay to purchase products so finances can be coordinated (Bank account/Term Deposit)
- Once approved by the Committee, place order for ANZAC Day stock/Remembrance Day stock (as appropriate)
- Call out for Team Leaders and discuss the sites they are to coordinate.
- EFTPOS units to be ordered by Treasurer, advise quantity required.
- Receive merchandise and verify against stock ordered.
- Check for discrepancies and if found, liaise and rectify with supplier.
- Check invoice for accuracy and once approved for payment, forward to Treasurer.
- Coordinate with Treasurer to submit merchandise claim form to District for State to refund all outlay costs.
- Conduct a breakup of bulk merchandise into separate selling site quantities.
- Complete the Master Spreadsheet with all price information.
- Advise selling prices of each item and distribute merchandise to team leaders only after bulk breakup is complete.
- Supply each Team Leader with a copy of their site spreadsheet detailing supplied amounts and selling prices.

Coordinate with the Treasurer for their actions on:

- Ordering the EFTPOS units.
- Cash cheque to be drawn for Team Leaders Floats.
- EFTPOS units to be receipted and checked for operational status, charged up and sufficient consumables available.
- Provide training to any new Team Leaders - EFTPOS unit.
- Distribute float to each Team Leader.

Board:

1. Authorise the expected outlay to purchase products so finances can be coordinated (Bank account/Term Deposit).
2. Supply copies of the RSL Insurance Policy and any other documentation requested by the Fund-Raising Coordinator.

Treasurer:

1. Submit merchandise claim form to District for State to refund all outlay costs.
2. Conduct the following tasks:
 - EFTPOS units to be ordered.
 - Cash cheque to be drawn for Team Leaders Floats.

- EFTPOS units to be receipted and checked for operational status, charged up, sufficient consumables available and date when available for collection/distribution to Team Leaders.
- Provide training to any new Team Leaders - EFTPOS unit.
- Distribute float to each Team Leader.
- Assist the Fund-Raising Coordinator as required.

Team Leaders:

- Everyone needs to be mindful of outlay costs and the security of monies and stock.
- Recruit, determine and advise the Fund-Raising Coordinator of the team members for the site.
- Establish and advise the site roster to all concerned.
- Collect merchandise once advised by Fund-raising Coordinator it is ready to be collected.
- Ensure copy of site spreadsheet with all merchandise allocated is provided.
- Check merchandise against spreadsheet for accuracy.
- Ensure each volunteer is provided the Safety Briefing to read prior to commencing their shift and provide training on the use of the EFTPOS unit.
- If anything within these general instructions is not fully understood, please reach out as soon as possible to the Fund-Raising Coordinator for clarification.

During Sales Phase

Fund-Raising Coordinator:

- Ensure Team Leaders maintain an hourly record on the Sub-Branch welfare stats form for all individual hours involved in the task.
- Monitor sales sites to ensure adequate resupply occurs and if necessary, amend site operations (close early if out of stock or slow sales) to ensure maximum outcomes achieved (where possible sale of all items).

Board:

Provide the appropriate authorisations/decisions as early as possible.

Treasurer:

Be responsive to assist the Fund-Raising Coordinator in all/any matters.

Team Leaders:

- Monitor volunteers and the roster.
- Advise the Fund-Raising Coordinator of any issues or shortfalls in merchandise.
- Deposit the proceeds from their site and report both daily sales and donations as separate entries on the notification emails.

- Compile the Welfare Stats Spreadsheet daily against the actual site roster so welfare stats can be compiled for all volunteers.

Post Sales Phase

Fund-Raising Coordinator:

- Collect or receive left over stock from Team Leaders and compile a 'stock on hand' report with quantities and values.
- Collect or receive left over stock from clubs/taverns, shops, schools, or other sites.
- Supply this information to the Treasurer to develop a report on sales to committee/members within 30 days of the selling event.

Board:

Provide the appropriate recognition of volunteer support.

Treasurer:

- EFTPOS units to be returned to the supplier – coordinate with supplier an appropriate date/time.
- At the time of unit collection, conduct a detailed inspection and accounting process to ensure all units are accounted for.
- Supply a detailed sales report/summary to the next Board meeting post sales period.

Team Leaders:

- After closing for the last day, return left over merchandise and EFTPOS unit to the Fund-raising Coordinator within three (3) days of the selling event.
- All monies to be banked ASAP with a notification email to both the Treasurer & the Fund-Raising Coordinator advising banked amounts.
- The Team Leaders to bank the float with the takings on the final day.
- Submit the final Welfare Stats Spreadsheet - the names of all volunteers for each event so letters of thanks can be raised and sent. Information also populates the invitation list to the February 'Volunteers Thank You Luncheon'.

Conclusion

The Fund-raising opportunities are limited annually to two (2) major commemorative periods, ANZAC Day and Remembrance Day and as these periods are vital to the income of the Sub-Branch a smooth and coordinated operation is required.

To maximise the opportunities there must be a coordinated approach where communication and mutual support is maximised.

Our selling/exposure site numbers are increasing and the coordination can be complex if not managed early and inclusively. To this end the Board and key volunteers must be engaging at all times so that we have a smooth process as our volunteer's time is valuable and limited.

STATEMENT OF RECEIPTS & EXPENDITURE

On behalf of this Sub-Branch, we wish to advise the following in accordance with the requirements of the Office of Fair Trading’s Street Collection Permit for the period of to April, 20..... (Inclusive).

RECEIPTS - \$.....

EXPENSES - \$.....

We believe the above to be a true and accurate record of this Sub-Branches 20..... RSL ANZAC Appeal proceeds

OR

The above approximate amounts are recorded on this Sub-Branches 20..... RSL ANZAC Appeal proceeds.

(Please circle appropriate statement)

NAME OF RSL SUB-BRANCH: North Gold Coast Sub-Branch Inc.

TREASURER’S SIGNATURE:

DATE:

Please submit this form no later than COB Friday May 20..... to:

RSL (Queensland Branch)

PO Box 629

SPRING HILL QLD 4004

Fax 07 3634 9400

Email profficer@rslqld.org

STATEMENT OF RECEIPTS & EXPENDITURE

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(Please circle appropriate statement)

NAME OF RSL SUB-BRANCH: North Gold Coast Sub-Branch Inc.

TREASURER’S SIGNATURE:

DATE:

Please submit this form no later than COB Friday November 20..... to:

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PO Box 629

SPRING HILL QLD 4004

Fax 07 3634 9400

Email profficer@rslqld.org