Planning Guide
GO RED FOR WOMEN FUNDRAISING
Welcome!

Our Go Red for Women campaign is a passionate, emotional, social initiative empowering our mothers, sisters, daughters and friends to take charge of their heart health.

Thank you for helping us fundraise to stop Kiwi women dying prematurely from heart disease. We are excited to have you on board as a host for your Go Red event.

This guide is packed with information and ideas to help you coordinate a fun and successful Go Red fundraising event.

If you have any questions, need fundraising resources or want someone to bounce ideas off, please contact the Heart Foundation events team and we will be happy to help.

Thank you again for choosing to support Go Red for Women and good luck planning your event.

We want you to have fun while helping save Kiwi women’s lives.

Contact Us
Phone: 09 571 4650
Email: GoRed@heartfoundation.org.nz
www.GoRedForWomen.org.nz
Contents

10 steps to your fabulous fundraising event ..................................3
Getting started ........................................................................................................4
Promoting your Go Red for Women event ...............................5
Kick-start your fundraising ..................................................................................6
Event checklist ...................................................................................................7
Wrapping it up .....................................................................................................8
Fundraising terms & conditions .................................................................9

Disclaimer: This guide provides general information only, it is not legal advice and you should satisfy yourself as to all legal obligations & issues regarding liability in relation to your proposed fundraising activity. The National Heart Foundation of New Zealand (Heart Foundation) is not able to provide legal advice. While care has been taken in preparing the content of this material, the Heart Foundation, its employees, associated entities and related parties cannot accept any liability, including for any loss or damage, resulting from the reliance on the content, or for its accuracy, currency and completeness. Use of this material by you or any third party does not constitute or imply an endorsement, recommendation or authorisation by the Heart Foundation of such use. In using this guide, promoting and running your event you must ensure that you make it clear that the event is not a Heart Foundation event, but that funds raised will be donated to the Heart Foundation.
10 Steps to a Fabulous Fundraising Event

1) HAVE FUN!
   Choose a fundraising idea that you’ll enjoy and feel passionate about organising

2) KEEP IT SIMPLE
   Don’t complicate things - the best fundraising ideas are usually the most simple

3) SET A FUNDRAISING TARGET
   Try to challenge yourself and make sure you plan how to achieve your goal

4) DO YOUR SUMS
   Plan out your costs well in advance and stick to the budget

5) SHARE YOUR STORY
   Telling people why you are fundraising will help bring your appeal to life!

6) CHOOSE YOUR DATE CAREFULLY
   Be mindful of what else is going on in the community; the last thing you want is a major date clash

7) TELL US ABOUT IT
   We’d love to hear all about your event so that we can provide you with support and resources

8) SHOUT FROM THE ROOF TOPS
   Publicise your event where you can!

9) KEEP IT LEGAL
   There are laws relating to charitable giving, so please read our legal section and do your research

10) GIVE YOURSELF A PAT ON THE BACK!
Getting Started

We want your Go Red fundraising event to be a smooth, simple process, and one that you’ll hopefully want to repeat! Our guide can help you on your way.

What event do you want to run?
There are loads of great event ideas out there. The trick is finding one that inspires you and your community

- Why not try a fabulous Go Red for Women High Tea? Get the women in your life together for an afternoon of delicious nibbles, games, tea (or bubbles!)
- What about a sports event? Try a community fun run, or challenge people with a 10km run/walk and ask everyone to come dressed in red
- Gather your friends together and create a red-themed dinner party, with a spread of delicious, healthy food
- A ‘wear red’ day at work or school is easy and fun. Encourage people to take part by giving away donated prizes for the silliest or most fabulous outfit! Ask people to make a donation to participate
- Try a fun quiz, with questions about heart health, food, and exercise

Choosing a date

- Although May is officially our women’s heart health month, you should feel free to hold your event at any time of the year
- Be aware of major sporting events and school holidays. See if you can find out what else is going on at around the same time in your area to make sure you don’t clash
- Pick a day and time which will suit most of your family, friends, work colleagues and whoever else will be attending

Venue

- Is it easy for people to access by all modes of transport?
- Is there plenty of parking available?
- Is the venue large enough to cater for your group?
- Does it have bathroom facilities?
- Do you need any approvals/permits?
Getting Started (continued...)

Serious stuff!

There are a lot of laws relating to charitable giving and what you can and can’t do to raise funds. Following our tips here will help, but if you’re worried please get some independent legal advice regarding the legal implications of your proposed activity or any liability that may arise. Ensure you hold all the necessary permits, licences and insurances.

A helping hand

- Rally your nearest and dearest (friends, family, work colleagues)
- Contact us to share your idea, get advice from our events expert, and order resources. We have balloons, heart badges etc.
- For a larger event, create a committee or ask for helpers to assist you with planning and running the event

Heart healthy food

If you’re offering food, or asking people to bring food along to your event, aim to serve up heart healthy options. Our website www.heartfoundation.org.nz has loads of delicious recipes for you to try.

Who should you invite?

- Register your event online and send invitations to everyone you know! Simply go to http://www.GoRedForWomen.org.nz/FundraiseOnline
- Local community groups
- Friends and family members
- Work colleagues
Promoting Your Event

To make your event a success, you need people to attend! There are lots of ways to promote your event and here are some ideas to get you started:

Start with your contacts
- Encourage your friends, relatives, work colleagues and acquaintances to come along, and ask them to invite their friends

Recruit a local celebrity
- Invite a local sports person, TV personality or community role model to participate – this will drive interest and help with word-of-mouth promotion

Use our templates
- Visit http://www.GoRedForWomen.org.nz to download resources and templates
- Customise your own poster and stick them up around your community
- Customise your own invitations and send to your contacts

Tap in to your community
- Think big! Contact your local radio station and newspaper to help promote the event
- Use social media to get the word out. Encourage people to ‘like’ and ‘share’ the event page
Kick-Start your Fundraising

Set yourself a fundraising target and create a plan to achieve it. You may be surprised by how deep your supporters will dig to help you get across the line. Here are some fundraising ideas:

Fundraise online
- Create a personalised fundraising page on www.GoRedForWomen.org.nz/FundraiseOnline
- Email your friends and family with a link to your fundraising page for an easy, secure way to donate
- Using your fundraising page, keep supporters aware of your progress with regular updates, and video and photo posts – easy!
- Share your fundraising page on Facebook, Twitter, or even LinkedIn, and encourage people to share, share, share
- Do one last push! It’s a great way to let people know you’ve achieved your goal, and to prompt anyone who still hasn’t donated

Sell tickets to your event
- You can either sell tickets or encourage people to make a donation upon entry to your event

Find sponsors
Help fund your event and raise extra money by calling on local sponsors. They can help by donating:
- Cash to assist with your event
- Products or services to help set up/run your event or for raffles, auctions and prizes
- We can help too - ask us for a sponsorship support letter

Raise more funds during your event
- Run a raffle with prizes for guests
- Hold a live or silent auction
- Provide opportunities for your guests to donate – you can even set up a laptop/iPad so they can donate through your fundraising page right there and then! We also have Go Red for Women donation boxes to give you

The Numbers
Any funds you raise need to be banked into our designated Go Red for Women account (below) as soon as possible – please don’t send cash in the mail. Our go Red for Women account ensures funds raised are separated from the other activities of the Heart Foundation. Note: if you use our online fundraising page, the donation and receipt are automatically transferred to us.

WESTPAC Heart Foundation – Go Red for Women 03 0104 0323584 05

Make sure you compile a breakdown of all income and expenses related to your event, and send us a copy for our records once we have received your event proceeds.
## Event Checklist

Below is a list of tasks you may need to carry out while organising your event.

<table>
<thead>
<tr>
<th>Item</th>
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<tbody>
<tr>
<td><strong>PREP TASKS</strong></td>
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<tr>
<td>Select a date. Look at any major sports games or events running on the same day</td>
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<td>Pull together a planning committee to help you get started</td>
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<td>Let the Heart Foundation events team know about your plans – we’re here to help!</td>
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<tr>
<td>Research any regulations or permits required that apply to your event</td>
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<tr>
<td>Confirm &amp; book venue</td>
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<tr>
<td>Set up your online fundraising page to make event planning a breeze</td>
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<tr>
<td>Develop a registration process. How do people sign up or buy tickets?</td>
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<td>Plan your catering requirements and factor in the cost</td>
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<tr>
<td>Prepare budget, including all costs. This will guide your ticket price</td>
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<tr>
<td>Put together an event run sheet, including timings, tasks, and responsibilities</td>
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<tr>
<td>Consider what equipment you’ll need (e.g. tables and chairs, microphone, staging)</td>
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<tr>
<td>Finalise your equipment list</td>
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<td>Do you need entertainment? A school band or local group is a great idea</td>
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<tr>
<td>Arrange a photographer to take photos</td>
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<tr>
<td><strong>SPONSORSHIP</strong></td>
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<tr>
<td>Identify suitable sponsors</td>
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<tr>
<td>Check your list of potential sponsors with the Heart Foundation, just in case there’s a conflict of interest (like a fast food chain!)</td>
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<tr>
<td>Approach and secure sponsors</td>
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<tr>
<td><strong>VOLUNTEERS</strong></td>
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<tr>
<td>Identify volunteer opportunities and responsibilities, and people to help</td>
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<tr>
<td><strong>PROMOTION</strong></td>
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<td>Send out your ‘Save the date’ and/or invitations</td>
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<td>Create and distribute event posters</td>
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<tr>
<td>Contact your local newspaper and/or radio station</td>
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<td>Load event details online (social media, ‘What’s On’ websites, etc.)</td>
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<tr>
<td><strong>AFTER THE EVENT</strong></td>
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<tr>
<td>Thank participants, volunteers and sponsors</td>
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<tr>
<td>Deposit any funds raised</td>
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<tr>
<td>Return a list of your income and expenses to the Heart Foundation</td>
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<tr>
<td>If you have people requiring donation receipts, use our Donation Receipts Form (found in our online resources) and send it back to the Heart Foundation</td>
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<tr>
<td>Register your event for next year!</td>
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</tbody>
</table>
Wrapping It Up

1. Firstly, WELL DONE! Planning and executing an event is no mean feat, and raising money for Go Red for Women is something you should be incredibly proud of.

2. Bank any funds you've collected. You can do this directly into the Go Red for Women bank account. Please include your name as the reference. WESTPAC Heart Foundation – Go Red for Women 03 0104 0323584 05

3. Do any of your donors need a receipt from the Heart Foundation? If so, please complete the Donation Receipts form found on our resources page and send it to GoRed@heartfoundation.org.nz or PO Box 17-160 Greenlane, Auckland 1546 (attention Events Team)

4. Please contact us if you have any questions: - 09 571 4650 or GoRed@heartfoundation.org.nz

5. Thank everyone for their help, by letter or email, and make sure you share your wonderful fundraising total.
   - volunteers
   - committee members
   - sponsors
   - special guests
   - attendees
   - donors

We have a simple template on our resources page which you’re welcome to use.

6. Lastly, make sure you get in early and register your event for the following year! Having given so much time and energy creating a new fundraising event, why not keep up the momentum and hold the same or a similar event next year? Set the date now, and include the details in your ‘thank you’ letters so people can mark it on their calendars.
Fundraising Terms & Conditions

We know you’ll enjoy coordinating your fundraising event for the Heart Foundation. It is important to note that there is a serious side to fundraising and these guidelines have been developed to help you understand your obligations. By coordinating a fundraising event to raise money for the Heart Foundation you agree to these Terms and Conditions:

**General**
1. There are numerous laws and regulations relating to charitable giving, fundraising, holding events and running various types of competitions. If in doubt please obtain independent legal advice regarding the legal implications and requirements of your proposed activity, any liability that may arise, and ensure you hold all permits, licences and insurances.
2. The Heart Foundation is unable to provide public liability insurance to cover community fundraising activities.
3. You accept all risks that may arise from the Event, including the risk of injury or loss of life.
4. You release the Heart Foundation and all persons or corporations associated directly or indirectly with the Heart Foundation from all known and unknown claims, liability, demands and proceedings arising due to any loss, damage, expenses or personal injury which may be sustained by you as a result of or in connection with:
   a) any neglect, act or omission or failure on the part of the Heart Foundation (including its agents, volunteers or employees) or any person/corporation associated directly or indirectly with the Heart Foundation; or
   b) Your participation in the Activity.
5. You will comply with these terms and conditions as may be amended by the Heart Foundation from time to time. You acknowledge that the Heart Foundation may update these Terms and Conditions and provide a copy to you.
6. You agree to provide true and correct information to the Heart Foundation and promptly notify the Heart Foundation of any changes to your information.
7. **Heart Foundation** means the National Heart Foundation of New Zealand (registered charity no. CC23052).

**Promotions**
8. Please remember that your fundraising event is one organised by you to benefit the Heart Foundation. As such, you should promote your event as supporting the Heart Foundation. A suggested way of promoting it is “Funds raised will go to support the work of the Heart Foundation.”
9. If you wish to refer to or promote the Heart Foundation, you must refer to the Heart Foundation as “the Heart Foundation”. You only have a right to raise funds on behalf of “the Heart Foundation” but cannot state that you represent “the Heart Foundation”.
10. The Heart Foundation will provide you with a Supporter logo that you have permission to use on promotional material to Fundraise. Guidelines on how to use the Supporter logo will be supplied with the logo.
11. Any promotional material you wish to create for your fundraising activity, such as flyers, posters, invitations, web sites or media releases must be approved by the Heart Foundation prior to being printed or disseminated.
12. Due to limited resources the Heart Foundation cannot undertake media relations for your fundraising event. As the coordinator of your event you must be responsible for all sales, marketing and promotion.

**Sponsorship**
13. You should make it clear to any business or person from whom you are seeking sponsorship that you are a community fundraiser raising money for the Heart Foundation and that this is not a Heart Foundation activity.
14. The Heart Foundation must not be associated with alcohol, tobacco or unhealthy foods.

**Funds & Receipting**
15. Your general obligations as event organiser are to:
   - Provide the Heart Foundation with an accurate estimate of the income and expenses associated with your fundraising event/activity before the event commences.
   - Keep accurate financial records, including itemised expenses and the reason for them.
   - If you wish to bank funds raised straight into the Go Red for Women bank account, please use your name as reference.
   - Funds raised and details of your income and expenditure must be returned to the Heart Foundation within 30 days of your fundraising event.
16. We recommend a minimum net surplus of 80% of all funds raised for this event, to donate to the Heart Foundation.
17. The Heart Foundation cannot pay expenses incurred by you, but you can deduct your necessary expenses from the proceeds of your event, provided they are properly documented. You should aim for your expenses to be less than 20% of total proceeds (e.g. if your event raises $1000, deduct no more than $200 of expenditure, each item of expenditure should be itemised and a receipt should be provided).
18. The Heart Foundation can provide tax-deductible receipts to people donating $5 or more.
19. The Heart Foundation does not issue receipts for event organisers to give out however we can issue them directly to donors once we have received your finalised Donation Receipt Form. It is important that you understand the official guidelines we use for issuing receipts, so you can provide correct information to people who support your efforts. You need to understand when a receipt can be issued, and to whom.
   - Tax deductible: Receipts can only be issued in return for a straight financial donation, when the donor receives no benefit.
   - Non tax-deductible: No receipt will be issued for ticket purchases (e.g. raffle), entry to an event, donations of goods or services (e.g., donation of raffle or auction prizes) or auction purchases. That is, anything where the person gets something in return for giving. In some instances we can issue a ‘sponsorship’ receipt which companies can use to claim sponsorship as a legitimate business expense (whether it is tax deductible for the company).