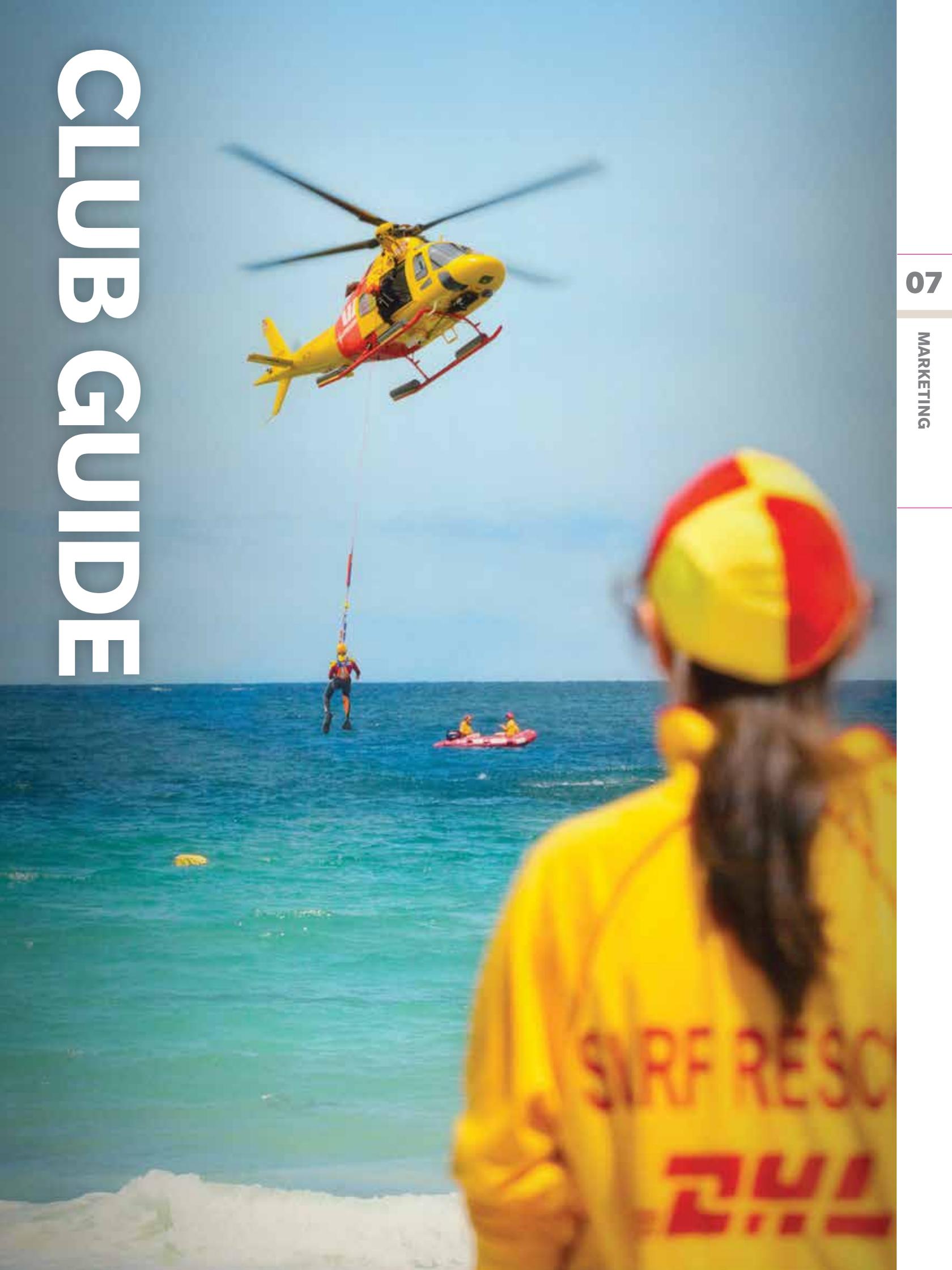


# CLUB GUIDE





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SECTION 07

MARKETING

## 7.1 MARKETING

Marketing is the communication of an idea, concept, product or service to another audience. This includes the 'selling' of an idea to a committee, group of club members, sponsors, local government, corporation or the wider community.

Membership recruitment ("Join your local Club"), retention ("Good reasons to stay at XYZ SLSC"), fundraising ("Donate now so that we can keep our beaches safe this summer"), sponsorship ("ABC Real Estate – the coastal specialists") or authority ("Surf Life Saving, looking after the community") are all examples of how marketing can be interpreted differently depending on the desired outcome.

However, before going to 'market' it is important to make sure that what you want to do is delivering on what the Club has identified as a priority or is consistent with delivering on the Club's overall goals (eg as per a Business Plan).

Remember, marketing is about establishing who your customers are, what their needs are and determining how you can satisfy their needs. The combination of community service, sport and recreation is an extremely marketable product.

If marketed correctly a club has a valuable asset that would be the envy of many professional marketing departments. However, with so many recreational options now available, it is unwise to sit back and wait until people stumble across your club or activity. You have to make them want to participate in your activity or sign up as a club member. Marketing is not "hard sell". It is relatively hard work that, if well planned, can be very rewarding.

### Marketing Rules

There are a number of marketing rules. You will find these rules throughout this section of the manual.

- Rule 1 – Be clear about what you want to achieve. Make sure that the end result is realistic and achievable given the available resources
- Rule 2 – You must be able to identify the market needs; if there is no need, there is no interest
- Rule 3 – Ensure the product you are offering is structured to satisfy the needs of your audience
- Rule 4 – Always deliver (as a minimum) what has been promised, when, where and how it was promised

A Marketing Plan should include:

- Assessing the needs of the affected people
- Product/program development
- Setting performance criteria
- Development of product/program delivery
- Cost to deliver product/program & actual market price
- Decide on best forms of promotion
- Relevant competition/local examples

Remember, the product you are marketing is your own club or organisation or an activity of the club. It stands to reason that you must present whatever you are offering in a positive light.

### What should the Club do?

Asking the following questions may help:

- What are the market needs that we can satisfy?
- What is our product and do the public understand it?
- Who is our target market? Who would be interested?
- What do we want to achieve? (eg more members, more sponsorship)
- How could we best promote it to the public?
- Do we have the work force to implement our plans?
- Is our target audience likely to be interested?



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### Who completes the marketing?

Marketing can be a straight forward process if you treat it as a series of stages. There is no reason why your Club could not implement its own marketing plan. It is important to be sure that everyone who is involved is clear of the steps and the particular order in which they must be done.

A team approach is recommended. This reduces individual reliance and ensures good support and communication throughout the process. One person should be responsible for the implementation of the marketing plan. This could be the club President, Development officer or a specifically appointed individual. This person should head a team or committee which constantly assesses the club's marketing strategy to ensure it continues to have relevance within the local community & Club.

### The Eight Marketing Stages

#### 1. Defining the product/service

Before you can undertake any marketing you need to identify and know the product or service you are offering. The point is that if you can't identify and define what it is you are marketing, it is unlikely that anyone else will be able to.

Define the product in relation to your club and its aims eg. if want to attract new members and direct your marketing efforts too much towards the movement, more people may take up surf lifesaving, but they may join another club. Think about the particular benefits and attractions of participating in your activity in your club.

Be as specific as possible about what you have to offer. This is your "selling tool" and the basis of your marketing strategy. While your club is your main product, other products or services may be offered in association with club memberships, such as professional coaching, free uniforms, preferential booking of club facilities, safety protection, and child care, etc. Sometimes, products can be in the form of special events. Competitions, fun days and social events can be promoted through marketing campaigns. Events can also be products. Competitions, "Come 'n' Try" days and social events can be promoted.

Examples of the products/services are:

- Special events
- Competitions
- Patrol services
- Lifesaving equipment
- Competition equipment
- Beach reports
- Education services
- Facilities

*Rule 2 - You must be able to identify the market needs. If there is no need, there is no interest. It is through the club's overall plan that it tries to attract sponsors, attract and retain members, develop strategies for member development, educate volunteers, educate the general public, convince local government of its worth and indicate to the members where the club is going in the future.*

Through a marketing plan the elements of membership, fundraising, sponsorship, public image and volunteer recruitment are addressed. It is the needs of these markets you are looking to satisfy. In return you achieve your objectives in these areas.



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## 2. Defining the target market

A marketing strategy will only be successful if it is aimed at the appropriate group of people. You can take the shotgun approach, load the weapon, fire it, and hope that whoever it hits will be interested enough to check out your activity. But unless you are extraordinarily lucky, you will probably end up wasting both time and money. It is much easier to target the audience or groups you want to reach and focus your program directly at them. Often, all it takes is a bit of common sense. For example, a netball club wanting to start a daytime competition would not target working men and women, rather those people who are free during the day.

A general rule is to ask: Who are they? Where are they? What is their interest? How can we reach them? And, most importantly, why should they be interested in what we have to offer? Look at the current members of your club. Ask who are they? Why are they here?

When trying to identify the target market, consider the following list:

- Gender
- Age groups
- Single people or couples
- Family groups
- Occupation
- Ethnic groups
- Religious background
- Educational background
- Location - town or suburb
- Other leisure interests
- Time available for leisure
- Availability of money for leisure activities

When looking at a club membership, consider the common factors they share. Are they all single or family groups? Do they come from similar backgrounds? Do they share other leisure interests etc?

Examples of the target market are:

- Kayak paddlers
- Swimmers
- Triathletes
- Sponsors interested in safety service
- Local businesses with an interest in the area

## 3. Defining the target market's needs

Having established your target markets you now need to determine what their needs will be. Once established you will need to determine whether the products and services you intend to offer will satisfy those needs.

The questions to be asked in this case are, for example:

- What does a 13 year old require of a program?
- What do his or her parents require from that program?
- If I was to sponsor this event what would I require?
- If I was a newspaper editor what would I want in terms of editorial content?
- For what reasons do I donate to the cause?
- For what reasons would I not donate to the cause?



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You can answer these questions yourself or amongst other club members but the best method is to ask a sample of your prospective target audience. Not only will this give you a more accurate response but it can be the beginning of establishing a rapport with the audience.

Once the target audience's needs are clear, the club needs to have another look at its products/services to see if they satisfy those needs in their current form. It may be that they need to be altered somewhat to ensure their attractiveness to that audience.

*Rule 3 - Ensure the product you are offering is structured to satisfy the needs of your audience.*

### **4. Establishing required return on investment**

As already mentioned your club will be required to put considerable effort into the marketing program. The effort the club contributes to this area will mean less time to do other things around the club. The club may have to decide which of the two efforts is the most valuable if it cannot sustain all programs. When making this assessment, everyone must be realistic about the possible end result. Another cost may be the alteration to a program or service to suit an external audience.

Is the return going to make the alteration worth instigating?

If the decision is made to proceed with the marketing effort the next decision is to determine the required return to the club. If the club is to make the effort, what can it realistically expect in return? Is this return satisfactory?

Be realistic about the price you charge. Make sure the price you charge is acceptable to the audience.

Examples of return on investment:

- Number of new members
- Funds to buy new equipment
- Higher profile in the local community

### **5. Setting objectives**

Following on from point four, you must have a clear idea of what you are trying to achieve through marketing. At this stage the marketing team must establish the club's objectives. These objectives are based upon the previously established required rate of return. They should become a clear and concise statement of the desired end results. These should be promulgated to all club members to ensure their support and confidence. Through greater awareness of the objectives others not involved with the marketing team may be motivated to help in some way.

Care must always be taken to ensure these objectives are compatible with the actual reasons the club exists eg. ensure the marketing strategy is supporting the club's primary charter or reason for being.

Examples of Objectives:

- Increase cadet membership by 15% within 12 months
- Have reserves of \$25,000 within three years
- Have three competitors make Australian finals at Australian titles
- Provide free sunscreen and hats to all patrolling members

### **6. Developing the marketing strategies**

When your objectives are clear, it is time to develop marketing strategies. These are a series of steps or actions which the club is required to take to achieve its objectives.

Don't forget to consider the price of your "product" or service as it should be in line with what your target group can afford to spend. What are the issues that will influence your group's participation?

Remember, you need to be able to reach your target audience so be aware of where they live, where they shop, what they read, what they listen to and if and where they work. The key is to work out what is important to each group and tailor your plan of action accordingly.



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Your step by step strategy might take the following sequence:

- Gain the attention of the audience
- Ensure they are interested by referring to their needs
- Demonstrate to them how you can satisfy their needs
- Encourage them to take action to satisfy their needs

Examples of Strategies:

- Deliver information through city councils, local sport centres or shops
- Meet with promotions manager to explain product benefits
- Run a rescue demonstration at the local swimming carnival
- Write regular columns for the local newspaper

### 7. Compiling the marketing plan

Once you have worked out your marketing strategy, you should prepare a marketing plan that outlines the steps you intend taking to implement the strategy.

The marketing plan is simply a written document outlining what you intend to do. This plan will present a summary of your marketing objectives, a description of your target market and of the product/service you are selling to this market and finally the method by which you intend targeting this market. The club's administrators can refer to it regularly to ensure the club is meeting its objectives.

Examples of the Product/service:

- Product/Service: After hours call out rescue service
- Target market: Non-working persons, local residents, healthy adults etc.
- Objective: To provide an out of hours rescue service to the local coastal community within two years
- Strategies: Create awareness through local newspaper articles; seek local emergency services support; find out how other clubs have set up such a service

For larger clubs or large scale projects you will probably need to compile a more detailed document.

### 8. Delivering the goods

It requires less effort to keep customers than it does to try and find new ones. Always deliver what you promised, when you said it would be available and as you described it.

It is a valuable rule of thumb to originally understate what the club can do and then over deliver. Your aim is to keep your audience happy, satisfied and keen to be involved again. This is best achieved by performing at or above their expectations. These expectations are usually developed as a result of what they are promised in your first meeting. Remember, not only can these satisfied customers come back for more, they can also encourage others to do the same.

It is also useful to write a report on the success or otherwise of the stages of the program to assist with the future evaluation and fine tuning. If suitable these reports should be made available to appropriate supporters.

### EXAMPLE MARKETING PLAN

The following marketing plan outline has been designed to cover all situations and questions. You may like to use it as a guideline:

#### Executive Summary

This is the overview of the marketing plan which serves as a summary for club executives and members. It serves as an introduction to your marketing strategy but is always written last. It should be short, concise and focus on the highlights of the plan. As a general rule, the summary should fit on one page (two at the very most), if it is any longer, it is not a summary.



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### **Situational Analysis**

This determines your club's position within the current environment. It should include a three-way analysis:

- The market situation – the size/prominence of your club in relation to others, the number of clubs in competition, the potential for enlarging the club, the stability or changing nature of the recreation market in your area.
- Internal analysis – assessment of your club's strengths and weaknesses
- External analysis – potential opportunities and threats to your club, why your club has the competitive advantage or how it can develop one. Also commonly referred to as SWOT analysis, identifying strengths, weaknesses, opportunities and threats.

### **Objectives**

Are they compatible with your club's mission? Objectives should match your funds, resources and abilities. Work out how your success can be measured. Establish a deadline for meeting these objectives.

### **Target Markets**

The group/s you are aiming to reach. Assess whether your product or service meets the needs of your target market.

Consider whether the target market has changed in recent times and in what way. Is there potential for expansion?

Consider the best methods of reaching this group.

### **Strategy and the Marketing Mix**

This is simply an outline of your strategy for implementing the plan. Consider how this marketing plan differs from the most recent plan your club has used. Why are these changes necessary?

### **Action Program**

Consider each component of your marketing mix in detail. Look at the history of each, the current situation and likely future trends. Assess your competition and think about any changes/modifications you may have to make in the future. Work out a test marketing process for your product.

- Product/service
- Pricing
- Distribution
- Promotion

### **Budgets, controls and accountability**

Developing and implementing a marketing and promotion strategy will require financial outlay. You should ensure that this plan is incorporated into the club's annual budget. Once completed the marketing plan will become an invaluable resource for the club. It can be used in the form of a prospectus that is given to potential sponsors, government departments when seeking grants and to potential new members.

*Rule 4 - Always deliver (as a minimum) what has been promised, when, where, and how it was promised.*

### **Specialist Assistance**

Check to see if any club members, their families and/or friends are employed in the marketing area and if they might be willing to assist. The Communications and Partnerships department at SLSWA may also be able to help.

Other free sources of help may be administrators or officials of clubs similar to your own. They will have faced, and dealt with, similar problems in the past and may be quite willing to pass on what they have learned. Public relations companies, marketing and advertising agencies, design specialists and market researchers may also be able to help. However, there is often a hefty price tag attached to these services.

Some TAFE colleges or Institutes of Technology may also offer courses in this area.



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## 7.2 SPONSORSHIP

First of all, corporate sponsorship is not a hand-out. Significant sponsorships are business arrangements that must fulfil specific corporate marketing objectives and provide a return on investment that can be measured. It is a business deal based on a win/win philosophy, giving value for both parties. Once the business deal has been struck, it is your responsibility to follow through and deliver what you have promised. Some sponsors, generally at the lower end of the scale, may simply want to support the club, and ask only for some small form of public recognition in return.

Sponsorship plays an important role in the marketing and promotion of our organisation. The good news is that sponsorship, as part of the marketing mix, is growing. While this means that more companies are sponsoring more things, the marketplace has become very competitive. It is only those proposals with the best product and the most attractive benefits which will win the race for the corporate dollar.

The keynote to sponsorship success is marketing synergy. Companies today are saying, 'Show me how you can deliver business to me and I'll buy'. The task is to create an activity or opportunity that meets the needs of sponsors, that drives business, and that delivers more value to the customer.

Sponsorship opportunities include events, programs, activities, equipment and infrastructure.

Why do companies get involved in sponsorship?

- Enhanced image/public awareness. Association with a high quality organisation, program or event can enhance a company's public image and is a good way for a new company in the community to get exposure.

**\*\* Please ensure that any potential sponsor conflict with SLSWA and SLSA partners is considered. For assistance in this area contact the Communications and Partnerships team at SLSWA.**

### **Publicity**

Sponsors often benefit from complimentary media coverage and publicity.

### **Improved customer relations**

Sponsorship allows sponsors to 'add value' to relationships with their customers. This can be in the form of free tickets or sponsorship of a free special event for the entire community.

### **Sale of product or services at the event**

Special events can provide a venue for trialing or selling a product or service. Sales promotions such as redeemable coupons or sales brochures can also be distributed at an event.

### **Increased employee morale**

Sponsorship of an event, program or activity can include an opportunity for a company to provide certain perks for employees, such as free tickets, guest participation or an opportunity to host VIP guests. Company employees may even become involved as volunteers.

### **Opportunity to be seen as a good corporate citizen**

More and more companies are investing in their local communities to enhance their profile and because they want to give something back to the community in which they operate.

### **Economic development**

Most companies understand that a healthy community is good for business. A well-run special event, activity or program can contribute to the quality of life in a community and provide flow-on economic benefits.



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### What do Sponsors seek?

Today, sponsors are seeking more than just some free tickets and t-shirts. Increasingly, they are seeking to 'own' an event, program or activity and be perceived as an integral part of it, through a long-term association. This is not an attempt at a take-over; it is in response to the increasing communications and sponsorship clutter that is growing in the marketplace.

What opportunities are most sponsorable?

- Major events, competitions and activities
- Top teams
- Development programs
- Equipment or infrastructure

Buildings, individuals and administration activities are the least favoured sponsorable activities, as they are not really newsworthy or exciting. The exception for this is major naming rights to an entire sports pavilion or building. Generally these activities are better used as the goal of a fundraising campaign.

### How does my Club secure sponsorship?

There is no easy path to attaining the goal of successful sponsorship. You and your club must be prepared to invest a great deal of time and energy, but persistence, thoroughness and professionalism will pay off.

Soliciting a corporate sponsor is a systematic process:

1. Evaluate the opportunity (event, program, activity, equipment or infrastructure)
2. Develop a sponsorship plan
3. Define the sponsor opportunities
4. Identify potential sponsors
5. Research potential sponsors
6. Prepare the sponsorship proposal and present
7. Follow up on the proposal
8. Sign a formal agreement

The time required to complete these steps and the formality with which they are conducted will vary considerably but this basic plan of action will work in almost any situation.

Lead time is critical. Most major sponsors will want 12 months lead time to successfully plan and budget for a partnership, although regional offices or branches will usually have a discretionary budget for smaller sponsorships, requiring less lead time.

### Evaluate the Opportunity

Before beginning the search for a sponsor, take a long, hard, objective look at the opportunity (event, activity, program, equipment or infrastructure). For instance, if it's an event, is it a quality event? Is it well planned? Is it new, creative, exciting, or fun? Are there any existing or aspiring stars involved? Who will attend? Will it attract media coverage? In other words, is it a 'sponsorable' event? How could a sponsor or number of sponsors enhance the event? What is needed for the event in terms of money, supplies, services, volunteers and so on? Could one sponsor provide all these things or is there room for several sponsors? (If so, avoid conflicts with other sponsors of your sport at a national level or other regions in the same category).

### Define Sponsor Opportunities

Once you have determined that an opportunity is sponsorable and have prepared a sponsorship plan, you will need to develop a package of tangible sponsor benefits. Try to ascribe a dollar value to certain things if you can, such as the equivalent value of paid advertising exposure from the opportunity would be worth.



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Be aware of what sponsors seek. For instance:

- Is there opportunity for the sponsor to promote the company's product or service?
- Maybe the potential sponsor's top priority is exposure
- Will the sponsorship opportunity attract media coverage?
- Where and how much?
- What other exposure could they get: t-shirts; tickets; banners; signage; the sponsor's logo on posters, fliers and other printed material and the club's online platforms?
- How else can you add value?
- Is category (industry sector) exclusivity desirable?

Is there an opportunity for the corporate sponsor's employees to get involved? A large corporation may be a prime source of volunteers, and company involvement could be good for employee morale.

### Identify Potential Sponsors

Who should you approach for sponsorship? Should it be a small local business or a national corporation, a radio station or a bank, an insurance agency or a small local store?

Every company you do business with is a potential sponsor - but not every company is a potential sponsor for every opportunity. Much time and energy can be wasted by preparing a sponsorship proposal and sending it out randomly in the hope that someone will be interested. It is more productive to identify a list of companies that 'fit' the opportunity and the sponsorship, and solicit from that list.

Be careful that the sponsors aren't in competition with each other, eg. asking KFC and McDonalds or Coca Cola and Pepsi to sponsor an event together is a bad move.

For events consider the type and size of the event:

- Who is the target audience and what do you know about them?
- At what time of the year is the event to be held?
- What is the estimated attendance?
- What opportunities exist for sponsor exposure and involvement?
- What opportunities are there for marketing extensions, such as access to your membership base? (*Beware of the restraints of the Privacy Act*)

What is needed from the sponsor? Don't overlook sponsorship by way of in-kind products and services (like travel). It can be just as valuable as cash if it offsets your costs.

With these questions in mind, you should be able to compile a list of companies that appear to 'fit' an opportunity based on their own target markets and company objectives.

### Researching the Potential Sponsor

Before approaching a potential sponsor, it is wise to conduct a little research to learn more about their business:

- What is their company philosophy?
- Do they have a sponsorship budget?
- When is their budget established?
- What types of sponsorships have they undertaken in the past?
- Have they been in the news lately?
- Look at trends in the potential sponsor's industry.
- Who buys and uses their product or service?
- What is their advertising strategy?
- What are their corporate goals in terms of image enhancement, publicity, customer relations and economic development?
- Who makes sponsorship decisions?



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Major corporations receive hundreds of requests for sponsorships every year. The sponsor seeker who has taken the time to gather more specific information about a potential sponsor will have an advantage over others competing for limited amount of sponsorship resources.

If the company is local, the task will probably be simpler. You might require more time and energy, however, to gather facts about a large national corporation. Contact them and ask for a copy of their annual report or refer to the relevant person in charge of sponsorship.

Network thoroughly, especially at a local level. Get to know your local business people and ask about their sponsorship policies in informal gatherings.

Remember the old adage: if you want money, ask for advice; and if you want advice, ask for money!

### **SPONSORSHIP PROPOSAL**

You should now have enough information and ideas to prepare a sponsorship package for each potential sponsor. The opportunity may be suited to one exclusive sponsor or any number of co-sponsors, in-kind sponsors or media sponsors. You should develop a sponsorship package for each desired sponsor and write a formal sponsorship proposal. Keep it brief - no more than five to six pages. Remember, the purpose of a proposal is twofold: to avoid a 'no' and to secure a meeting. There is no such thing as a perfect proposal, but the following format works:

#### **Executive Summary**

An executive summary at the front of the proposal should briefly describe the opportunity, the sponsor opportunities or benefits, the sponsor investment and when a decision is needed.

#### **Introduction**

If the company is unfamiliar with your organisation, a simple introduction may be necessary. You might also give some background about the opportunity and how it came about.

#### **Description of the opportunity**

An event, program or activity should be described in detail, including the date, time, location, past attendance figures and target audience. State your goals for the event. Include information from past events, including news clippings. For Equipment or Infrastructure describe what it is, where and why it is used and how effective it is/will be.

#### **Sponsorship Investment**

This section should include a detailed outline of what you are requesting of the sponsor - cash, product, prizes, advertising/promotion, services or expertise. Always include a value. Make it realistic to cover your costs and to make a profit, bearing in mind that what you ask from the sponsor must be relative to the value of the benefits you are offering. Never undersell and risk running at a loss.

#### **Sponsor benefits**

Clearly outline all sponsor opportunities and benefits. Include intangible benefits such as enhanced image or increased public awareness. Wherever possible, quantify the returns.

#### **Deadline for decision**

Clearly state the deadline for the company's final response and your own contact details. Expect a response within 10 days or follow up yourself by phone. Offer to meet and discuss the proposition.

#### **Appendices**

Include support materials such as your sponsorship plan and brief budget, photographs, artwork or diagrams where appropriate, letters of support or recommendation, old newspaper clippings and programs where applicable; anything that you think might enhance your proposal.



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The proposal should state clearly the type of sponsorship. Is it an exclusive sponsorship? In order to make a wise business decision, the company may need to know what other types of corporate involvement you are planning.

SLSWA has a range of photographic resources and template designs that could assist in making your proposal stand out from the crowd. Contact SLSWA's Communications and Partnerships team for a copy of the SLSWA Brand Guidelines.

Remember:

- All sponsors need time to review proposals and make decisions. Allow plenty of lead time (three to twelve months depending on the opportunity)
- The proposal you may eventually sign up will probably be different from the one you went in with  
State clearly that you are prepared to be flexible to accommodate their specific marketing needs
- The content and appearance of the proposal is of utmost importance, but don't go overboard. A proposal that stands out has a better chance of being read and not just put in the decline heap. Today's technology makes it easy to produce professional looking documents for minimal cost
- Proposals for exclusive sponsorship should never be sent to two companies at the same time (especially in the same industry!) What if they both accept? Word gets around and your club and proposal risks being devalued
- If you are rejected, try not to be discouraged - find out why and keep trying

### **The Five Essentials of Sponsorship Proposals**

1. Proposal must show value for money
2. Proposal must give consideration to the target company's philosophies and objectives
3. Proposal must be detailed, accurate and comprehensive
4. Proposal should look as good as possible without going overboard
5. Amount of money required must be within realistic guidelines

There is an element of good luck involved in securing sponsorship - finding the right window of opportunity with the right company at the right time. In the long run, persistence, professionalism and a genuine desire to make that sponsor part of your team will pay off.

### **Sponsorship Agreement**

Once terms have been agreed, they should be acknowledged in some way by both parties. This can be as simple as a letter of intent for small sponsorships. For anything over say \$5,000, a written document spelling out exactly what is expected of both parties is recommended.

### **Keeping Your Sponsor**

Securing a sponsor is only the start. Event sponsors add another dimension of responsibility to the organisation planning the event. Additional effort is required to coordinate the sponsor functions and the sponsor becomes a second 'audience' that must be satisfied with the result.

Keeping sponsors is as important as finding them. Follow the sponsorship implementation with a thorough evaluation (agree on a timeline with the sponsor), quantifying the benefits and where possible including copies of any media coverage. For events, programs or activities, mementos such as t-shirts, photos or a video are an inexpensive touch that sponsors really appreciate.

Never think that because your sponsors are commercial they are out to exploit you. They have decided to be your sponsorship partner because you represent good value, the partnership demonstrates shared values, and that they are good corporate citizens. Sponsorships can also be a means of communicating the sponsor's messages to your target audience. Always remember that you and your sponsors are living and working in the same community. You have a lot to offer each other.



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## 7.3 FUNDRAISING

Fundraising is the process of soliciting and gathering contributions as money or other resources, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies. It can also include raffles and typically involves the collection of donations at events (Street Appeal, Balls, Golf Days), venues (eg shopping centre) or via direct mail (eg sending letters seeking donations to all businesses in the area).

### Charitable Fundraising

The Charitable Collections Advisory Committee regulates our fundraising activities by the granting of an Authority to fundraise in Western Australia. SLSWA holds this authority on behalf of itself and all Clubs in Western Australia for Street Collections in the Perth Metropolitan area and Door to Door appeals

As such there is an obligation on everyone to conduct themselves within the guidelines and regulations as set down by the SLSWA Marketing Team for each specific fundraising activity.

### Raffles

Raffles are regulated by the Department of Racing, Gaming and Liquor (DRGL). Where a raffle is organised outside the authority of SLSWA (eg for your Clubs benefit only), it will be necessary for your Club to:

- Obtain a Charitable Collections License
- Lodge an application form with the DRGL

### Is it a Donation, Raffle or Sponsorship?

It is important to understand the distinction between a donation and funds received through a raffle or a sponsorship.

- Donation – a gift of cash or goods with no requirement by the recipient to promote a business or a product. It can often result in the issuing of a receipt for tax-deductibility purposes.
- Raffle Income – cash given in exchange for a ticket(s) in a game of chance. No tax deductible receipt is allowed.
- Sponsorship – cash or goods/services are exchanged in return for certain promotional or business returns to the Sponsor.

### Plan for Success

If there is a key to success it is planning and enthusiasm. There is plenty of hard work to do before potential donors are approached. The following are broad guidelines on how to fundraise for a specific purpose which cannot be carried out within the club budget. Remember people will not support a poorly defined cause - they like to see where their money is used. The following points are in chronological order, as far as possible, but some things are carried out in tandem.

- Establish how much money is needed.
- Understand exactly what the money is needed for. Why is it a good cause? Why is it different to or more important than, other fundraising causes?
- Make sure the project outlined to potential donors will fill a need.
- Set up a group of enthusiastic, well-informed and influential fundraisers who are prepared to offer their time, energy and money. Prepare them to answer all questions potential donors may pose.

These people are the public face of the club in a campaign where promotion and public relations play a key part in the success of the project. Enthusiastic askers breed contented givers.

- People from within the club are preferable to the employment of a professional fundraiser although it may be worthwhile to seek professional advice regarding your overall fundraising strategy. A team of people is more effective than an individual.
- Identify potential donors. Studies have shown only 10 per cent of people are givers. Don't waste time on the other 90 per cent.



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Potential givers fall into three categories:

- Those automatically interested - members, supporters, parents
- A group with natural links to the club - equipment suppliers, other groups who share the same facilities
- Those in the community who might see some benefit in the project or use the beach during in the year

### **PLANNING AND FINE TUNING**

Analyse the donor list. Decide on your approach. Choose askers carefully - having the right people on the job is vital. Askers should be from the same section of the community as those they are approaching. Askers set an example by being prepared to do what they ask others to do.

### **Co-ordinate the campaign**

Have a plan which allocates specific tasks. Make sure all those involved are well-educated on the cause and the reasons for it.

### **Approach donors**

Use a variety of approach methods to ensure a wide coverage of potential donors. Work out the most cost effective combination of direct mail approaches and personal follow ups.

### **Start with as few names as possible to raise the required amount**

Go to the well-off first. Major donors are the key to success. Make a list of these with another list covering secondary donors. Typically one third of all donations come from the top few donors. Plan your workforce accordingly.

### **Start person-to-person asking**

Accept pledges. They raise donation levels.

### **Put a time-span on fundraising and work intensively during that period**

This is more effective than a low-key campaign which drags on.

### **Reward and thank donors**

It is very important to contact donors to thank them, either via post, email, a phone call or face-to-face for larger donors.

### **Record and analyse who donated and who declined to donate**

This information may be useful in coming years.

### **Assess how well the campaign went**

Were there areas that could be improved on? Discuss the campaign with all concerned. Make a note of conclusions and store them for future reference.



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## HOW SURF LIFE SAVING WA CAN HELP

SLSWA has developed a number of resources and programs that have been designed to provide Clubs with the essential tools to raise money for themselves.

These include:

- Annual Street Appeal and Door Knock Appeals – these events are coordinated by SLSWA to allow clubs to raise funds in the community. The annual Street Appeal is a chance for clubs to seek donations from the Perth CBD, the metro area and throughout regional WA. All money raised is retained by the clubs and success is thus dependent on how well the club engages its members and local communities to assist
- Boardies Day – this annual fundraiser is coordinated by the Surf Life Saving Foundation and Surf Life Saving WA and is another chance for clubs to engage local communities and raise funds for club needs. Success is again dependent on clubs ability to engage members, local businesses, schools and community groups to participate in Boardies Day and make donations to the club. This day is supported by online fundraising websites, resources (stickers, posters, beach balls) and by National and State promotion of the day and cause
- SLSWA can also assist Clubs by providing proposal templates to apply for philanthropic trusts, grants and other funding
- Special event project plan to enable a Club to conduct a corporate golf day, or other activities



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## 7.4 INTELLECTUAL PROPERTY

The unauthorised exploitation of Surf Life Saving and its members through Intellectual Property (IP) infringements undermines the fundraising activities of SLS and its affiliated clubs which sustain the continued provision of surf lifesaving services on Australian beaches. Most unauthorised uses of SLS IP have consisted of beach scenes comprising elements such as lifesavers in full uniform, cap, patrol flags and the red and yellow colours. Surf Life Saving Australia Limited (SLSA) own all SLS associated IP including the red and yellow imagery associated with surf lifesaving flags, caps, uniforms and equipment and the phrases 'surf life saving' and 'surf rescue.'

Surf Clubs must not commercially promote the Intellectual Property without first consulting SLSWA and obtaining its approval. Any promotion by a Surf Club can only be within the boundaries set by SLSWA. Where a Surf Club seeks to promote the Intellectual Property within its authorised area it must submit an application to SLSWA stating the nature, term and extent of the proposed promotion. The word "promote" in this paragraph means the use or exploitation of the Intellectual Property and includes granting the right for sponsors to use the Intellectual Property in their own advertising, as well as using sponsor's names or logos on or in conjunction with the Intellectual Property. Clubs do not have the authority to utilise or provide approval to companies, organisations, media etc. to use SLS IP (flags, uniforms, equipment) for any purpose without consulting SLSWA.

Ongoing protection of the Intellectual Property will ensure that community, public and corporate perception of surf lifesaving remains positive whilst providing a basis for SLSA to secure much needed revenue to support lifesaving initiatives at all levels. Any possible SLS IP breaches should be reported to the Communications and Partnerships Manager at SLSWA for further investigation and follow up.

For more information refer to the SLSA Intellectual Property Policy available on the SLSWA website or contact the SLSWA Communications and Partnerships team.