

# LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

## SECTION 6 – PLANNING

### **Introduction**

This section on **Planning** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to [www.leeds-ic.org.uk](http://www.leeds-ic.org.uk).

There are lots of elements involved in good planning but the ones we are going to highlight in this section are:

- How to write a simple business plan
- Health and Safety
- Risk Management
- Insurance

### **1. BUSINESS PLANNING**

A business plan is a document that describes an organisation – what it does, what it aims to achieve and how this will be accomplished. A good business plan can help you apply for external funding, guide decision making, identify potential problems and measure your success.

The plan should include the following sections:

#### ***Executive summary***

A summary of key points from your business plan, including highlights from each section

#### ***Business description***

What your organisation does, the history of the organisation and the vision for the future

#### ***Products and services***

A description of your products and services, what differentiates them from others' and any planned developments

#### ***Marketing and competitors***

The size and target of your market, who else offers similar services and products, strategies for promoting your organisation

#### ***Management team and key personnel***

The structure of your organisation, profiles of members of the management team and their skills and information regarding other personnel

#### ***Operational plan***

The logistics of your organisation – your location, who owns your buildings, processes for providing your services, management information systems, IT systems and any planned developments

#### ***Financial forecast***

Financial plans for the next three years, with detailed information for the next twelve months – cashflow forecasts, profit and loss accounts and balance sheets – and risk analysis.

For more detailed information on putting together a business plan visit Business Link's website at <http://www.businesslink.gov.uk/bdotg/action/layer?topicId=1073869162>

## 2. HEALTH AND SAFETY

Management committee members and trustees of charities are responsible for ensuring that the organisation is properly and legally managed. This includes complying with charity and other relevant laws and safeguarding money, property, people and reputation. Funders will want to know that your group is doing this, as their reputation may also suffer if something goes seriously wrong in a project they are funding.

In order to manage events and activities safely it is important to have effective Healthy & Safety systems in place. You may already have a Health & Safety Policy but this tends to focus on the needs of the people that operate or run an organisation and its premises rather than on the beneficiaries of the service provided. This means that many activities you provide are not covered in your organisation's Health & Safety Policy so you may need to look at developing additional systems.

A valuable tool is a Venue Health and Safety Check, which is a list of all the safety aspects that the worker needs to check before starting the activity and should be carried out for both indoor and outdoor venues. It can also be a check undertaken before booking a venue to ensure it meets the standards required.

Health and Safety Procedures should be prepared for all activities. They should be easy to read and designed so that anyone who takes on this activity will immediately understand what is required of them to ensure the activity is managed safely. Safety Procedures can also be prepared as a checklist, but unlike the venue Safety Check they should consider all aspects of managing an activity safely.

The following organisations can provide more information on health and safety related issues:

### ***The Health and Safety Executive***

Help line 0845 3450055. Web Site [www.hse.gov.uk](http://www.hse.gov.uk). There are several free leaflets giving clear and simple advice. Order publications from 01787 881165.

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## 3. RISK MANAGEMENT

When you are running an organisation and planning activities you need to think about what might go wrong. This might be rain on the day of your fete, an accident, complaints about advice given or rejection of a grant application you are relying on. These are all examples of risks. You need to think about actions you can take to prevent or reduce the risk and deal with the consequences if it does happen. This is Risk Assessment and Management.

People often think of risk just in terms of health and safety, but it is far wider than this and includes anything that could have a significant impact on the organisation's governance, management, activities or reputation. Risk management does not require high levels of knowledge and technical skills. Like most aspects of good management it depends a lot on common sense and planning ahead.

The Management of Health and Safety at Work Regulations 1999 requires all organisations to do a risk assessment identifying risks to employees, clients, members of the public and anyone who comes onto the premises or uses its services. They must then draw up an action plan that shows the proposed control measures that will reduce the risks and/or minimise the impact.

Appendix 1 provides a sample Health and Safety Risk Assessment Process, suitable for a large event or a high-risk activity. For a simple activity, e.g. organising a jumble sale, a list of the identified risks and their control actions may be adequate.

## 4. INSURANCE

The types of insurance cover you need depend on how your organisation is set up, whether you have employees, run events, own a building etc. Shop around for insurance to find the best deal. Some companies offer specialist packages for the voluntary sector. Ask an Insurance Broker to find such a company for you.

### **Compulsory Insurance**

- Employers Liability (if you employ staff – this should also cover volunteers)
- Road Traffic Insurance (if you run a vehicle)

### **Essential Insurance**

- Buildings, Contents and Plate Glass windows
- Public Liability – This is very important as it protects the group from claims for injury, loss or damage. Make sure your policy explicitly includes volunteers and members.
- Special activities – to cover a short or one off activity not covered by other policies.
- Professional Indemnity – if you give advice or professional services.

If you own your own building then you will need buildings cover. Even if you only rent premises or hire them for a short period, you may need contents insurance.

If you have trustees then trustee liability insurance is available.

For information about insurance for events, see section 6b of this guide.

## 5. WHERE CAN I GET HELP OR FURTHER INFORMATION?

This information sheet is only a starting point. You may find it helpful to get further support and information to help you understand your legal responsibilities, carry out risk assessments and develop and write your policies and procedures.

### **Voluntary Action Leeds**

Voluntary Action Leeds, Stringer House, 34 Lupton Street, Leeds LS10 2QW Tel 0113 297 7920

### **The Charity Commission**

There is a help line on 0845 300 0218. You can download free copies from the website or ring 0870 333 0123 [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk).

- CC49 Charities and Insurance
- Charities and Risk Management

**VolResource:** [www.volresource.org.uk](http://www.volresource.org.uk) this web site has lots of useful information on Risk Assessment, Health and Safety and Insurance for the Voluntary Sector. The site has details and links to other useful resources and sites.

**Voluntary But Not Amateur:** a guide to the law for voluntary organisations and community groups. Ruth Hayes and Jacki Reason. 7<sup>th</sup> Edition 2004. This covers relevant legislation including charity law, employment & finance law, Data Protection Act and more.

**PERS – The Pay and Employment Rights Service** – is a charity promoting good practice and employment. They support and train employers across Yorkshire and advise employees and offer consultancy, training, leaflets and factsheets. Telephone 01924 439381, email [admin@pers.org.uk](mailto:admin@pers.org.uk) or visit [www.pers.org.uk](http://www.pers.org.uk)

## APPENDIX 1 HEALTH AND SAFETY RISK ASSESSMENT PROCESS

A template for carrying out a health and safety risk assessment can be found below. You should involve staff, volunteers and users in carrying out your assessment. It is also important to get expert advice if you are unsure about what is required. You can use this template to assess other risks, for example planning and funding a new activity.

Risk Assessments should be carried out for **all** trips and activities. They are the best way of both:

- Adequately planning for safety
- Evidencing an organisation's efforts to meet their Duty of Care.

Risk Assessment involves looking at a planned activity and the location for that activity. It is the process of identifying potential hazards and finding ways to reduce or control the risk they present. It involves:

- Identifying potential hazards and the dangers they present
- Assessing the level of risk and the likelihood of the danger occurring
- Identifying who is at risk
- Identifying control measures to prevent or manage the risk
- Assessing the effect of the control measure
- Recording the process

All risk assessments must be written down, dated and signed. This will assist workers in seeing how current and valid the assessment is. They should be active working documents and must be accessible, both physically and in terms of how easy they are to understand and use. Any worker should be able to pick up a risk assessment and be able to:

- See where potential danger may occur and why
- See what the worker is expected to do to prevent or manage this risk
- Feel confident and able to manage the activity safely with all control measures in place
- Feedback to you as writer of the Risk Assessment if the control measures don't work or need revision.

Risk assessments should always be undertaken before an activity takes place for the first time in order to ensure they are planned safely. They should form part of the planning process to decide whether or not the activity is safe to run. They should then be reviewed on a regular basis – either annually or 6 monthly depending on your organisation's perception of the need. They do not otherwise need to be redone except in the following situations:

- Whenever anything changes – the clients, the staff supervising, the venue, the activity
- Whenever an incident occurs that suggests current control measures are inadequate
- When an activity takes place outside, the Risk Assessment should be redone on the day the activity takes place, preferably an hour before, to ensure the assessment is done in the same conditions that the activity will take place. Environmental conditions can change rapidly.
- When using professional venues for events, they should have done their own assessments. However, you may need to inform the centre of any particular needs of your client group that may affect risk. You will also have to risk assess anything that happens between activities.

# Risk Assessment (model form for voluntary and community groups)

Have you carried out a 'risk assessment' for the activities of your group? No? Complete this form for your activity and keep a copy on file. Make sure that you act on any areas of concern arising from the assessment. Unless we ask for it you don't need to send us a copy. It is recommended that a checklist be prepared and a risk assessment carried out before any one-off activities or purchases. For ongoing activities (e.g. regular meetings) the Checklist and Assessment need only be revised annually.

The group leader should ensure that a health and safety briefing is given at the commencement of the activity to all participants and leaders.

Organisation name .....

Where is the activity taking place? ..... Date of activity .....

Brief description of activity .....  
.....  
.....

Number of participants..... Number of leaders .....

Name of Child Protection Officer ..... Name of qualified first aider .....

Date risk assessment carried out .....

Who attended the risk assessment meeting? .....  
.....  
.....

Signed ..... Print name .....

Position in the group .....

A risk assessment is an evaluation of hazards and the chance that it may cause harm, and any factors that can affect the chance and extent of the harm both to participants and leaders. This assessment should consider both the potential severity of the consequences and the number of people who may be exposed to each hazard. Ideally you should carry out this assessment with all those taking part in the activity, including children and young people.

Hazard Describe the potential hazard	Harm Describe the harm it may cause	Assessment of Risk			Who is at risk?	Control Measures What can be done about it?	Final Assessment of risk
		Level of harm if hazard occurs	Likelihood of hazard occurring	Assessment of risk			
<b>Example</b>							
<i>Rough terrain causing children to trip</i>	<i>Cuts and grazes</i>	Low	Low	Low	<i>Children Staff</i>	<i>Warning of potential danger. First aid.</i>	Low

You may need more space so please make copies of this page to continue your assessment.

## HOW TO COMPLETE YOUR RISK ASSESSMENT

### **Hazards and Harm Columns 1 & 2**

Identify a range of hazards, considering every aspect of an activity from the physical environment to the activity itself. For example, consider the hazards presented by:

- landscape –a river, rocky ground
- Vegetation - patches of stinging nettles or brambles
- Wildlife – from wasps and spiders to cows and dogs – dog muck
- Litter – broken glass, needles from syringes
- Unsafe equipment – damaged swings, slides etc
- Hot weather causing sunburn, dehydration etc
- Public access – leading to abduction or molestation of a child
- Hazards relating to the activity – e.g. if playing rounders, a child could be hit by a bat or a ball.
- Transport to and from activity
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Be specific when identifying hazards: don't say 'weather' is a hazard because it isn't. Particular types of weather might be. What are they and what harm do they cause the child? e.g. hot weather causes sunburn, sunstroke and dehydration. Don't put several hazards under one umbrella hazard as different control measures may be needed for each. Some people put everything needing the same control measure (e.g. first aid) under the same hazard – this is a mistake because although first aid may be a way of **managing** a variety of medical emergencies (e.g. trip over a tree root and a fall from a high slide), the way to **prevent** the accident occurring in the first place may be very different.

### **Assessment of Risk (Columns 3, 4 & 5)**

Risk is assessed by weighing up the level of harm caused by the danger you identify against the likelihood of the danger occurring. The result is what you would write in the Assessment of Risk column. You may choose to do this by saying the risk is High, Medium or Low or by using numbers to score the risk. If using numbers, a Key Code should always be included on the Risk Assessment sheet.

### **Control Measures (Column 7)**

Control measures can be **PREVENTATIVE**, allowing you to reduce the risk of the danger from occurring, or **MANAGING**, helping you to manage the situation if the danger does occur. Think about both aspects when writing control measures. Control Measures should always be specific to the hazard identified.

### **Final Assessment of Risk (Column 8)**

Finally, assess the risk once your control measures are in place. If it is still high, consider choosing an alternative activity. You are aiming to reduce your risk to Low in this column as it is unlikely that you will ever eliminate risk altogether. You should aim to prevent what harm you can from occurring, and prepare to effectively manage any risks you cannot eliminate.

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Finally, assess the risk once your control measures are in place. If it is still high, consider choosing an alternative activity. You are aiming to reduce your risk to Low in this column as it is unlikely that you will ever eliminate risk altogether. You should aim to prevent what harm you can from occurring, and prepare to effectively manage any risks you cannot eliminate.

# LEEDS INFRASTRUCTURE CONSORTIUM RESOURCE PACK

## SECTION 6b – PLANNING – RUNNING EVENTS

### **Introduction**

This section on **Running Events** is part of an 8-pack series of resource materials that has been produced by the Leeds Infrastructure Consortium. For further information, please go to [www.leeds-ic.org.uk](http://www.leeds-ic.org.uk).

### **FIRST STEPS**

Whether you are looking to organise a fundraising event, an awards ceremony, or a social gathering for local residents, the steps you need to take will follow a similar pattern.

- Make sure your objectives are clear
- Plan and delegate
- Budget - get the costings together
- Think about safety, licences and regulations
- Plan your marketing and publicity
- Sort out the detail
- Survive the big day!
- Mop up and review

The aim of this guide is to take you through some of the elements you need to think about and some of the pitfalls you should try to avoid!

#### **1. MAKE SURE YOUR OBJECTIVES ARE CLEAR**

Why do you want to hold the event and how will you measure success? It is important that everyone understands what you want your event to achieve so you can tell if it has succeeded. Some examples may include:

- Raise the profile of your group: measure the number of new people who get in touch as a result
- Attract new supporters: how many donations or new members did you get?
- Launch a new campaign or appeal: what kind of press and other coverage did you receive
- Raise money: what was the profit?
- Simply have some fun: did you get good feedback?

Who is the event targeting? You need to think about this very carefully because this may well determine other aspects of the event - location, date, ticket price etc. It this:

- Current members?
- Prospective new members and, if so, are they adults, older people, young people?
- People with a specific interest i.e. environment for instance?

By knowing exactly where you are headed, you are more likely to reach your goal.

## 2. PLAN AND DELEGATE

With your objectives in place, you now need to draw up an outline plan.

One of the first considerations is agreeing a date for your event. Make sure that you allow enough time to organise everything and promote the event, and check that the date doesn't clash with similar events locally or major activities like World Cup finals.

Next, choose your venue. Is it available on the date? What's the maximum capacity? Is there enough car parking? Does it have disabled access? Are there any restrictions on use, e.g. sale of alcohol? Do you need catering facilities? Can you cover the cost?

Draw up a timetable with all the main dates and deadlines on it, to clarify how much work there is to do and when. Don't forget notice periods, if any licences or registrations are required. (See section 4 below).

Most events are too much work for one person to organise, so try to get more people involved. If you belong to a group, you may find this support readily to hand, but it may offer the opportunity to recruit new people who share your interests and bring relevant skills. Think about asking other local organisations to get involved. They may have the expertise to take a major aspect of the event off your hands.

Give everyone clearly defined roles. Who will look after the logistics (securing a venue, provision of facilities, health and safety issues)? Who will keep track of the finances? Who can take care of the publicity and marketing? Who can check out any legal responsibilities?

Arrange regular planning meetings and produce meeting notes with assigned action points.

Although you do not need to be a formally constituted group to run an event or activity, if you are thinking of running a number of them, or doing them regularly, you may wish to consider becoming constituted. The guide "Introduction to Volunteering" has all the relevant information you might require.

## 3. BUDGET - GET THE COSTINGS TOGETHER

### Expenses

Events cost money – usually more than you anticipate - so it is important that you create a detailed budget. Consider everything you need to spend money on including:

- Venue hire
- Parking
- Security
- Insurance
- Advertising
- Design work
- Printing (tickets, signage, posters, flyers, programmes, raffle tickets)
- Phone bills & postage
- Volunteer expenses
- Prizes
- Hire of equipment (PA system, portaloos, tables, glassware etc)
- Decorations
- Games & entertainers
- Refreshments
- Transport
- First aid provision
- Fees for licences and permissions
- Speakers expenses
- Photography

Decide which of these are fixed costs and which are variable. For example, the cost of hiring the venue is likely to stay the same regardless of the numbers attending (fixed cost), but the costs of catering or printing will alter according to the number of people (variable). This will allow you to recalculate your budget easily, should the scale of your event change.

Note which items have up-front costs or deposits and make sure you have the cash to cover them. Check if any costs are refundable if for any reason you need to cancel the event, e.g. for bad weather

### **Income**

Are you looking to generate any income from this event or cover the costs from existing funds?

Here are some of the common sources of income:-

- |  |                          |
|--|--------------------------|
| ▪ Ticket sales (minus complimentary tickets) | ▪ Sponsorship            |
| ▪ Regular income                             | ▪ Grants                 |
| ▪ Cash donations & pledges                   | ▪ Programme adverts      |
| ▪ In kind donations (goods and services)     | ▪ Raffle tickets         |
| ▪ Food and drink sales                       | ▪ Product sales          |
| ▪ Bar sales                                  | ▪ Auction                |
| ▪ Competition entry                          | ▪ Charging stall holders |

If the sole aim of the event is to raise money you should generally aim to bring in three times as much as you spend. The A - Z of Fundraising Ideas in Appendix A includes activities which may help to boost your funds.

If you are relying on ticket sales, it is important that you pitch your ticket price appropriately, both to suit your target audience and achieve the profit you are seeking. See Appendix B for help with calculating your ticket price.

It is vital that you know how much you need to raise to break even and you should aim to raise this **before** the day, to avoid sleepless nights! Consider asking for event sponsorship from individuals or local businesses, or promote advance ticket sales.

There are a number of financial procedures to build into your planning too. How will you record income received and all expenses? How will you keep on track against agreed budget? What facilities and procedures will you need for cash handling and safe storage on the day? You should use a safe if available, but otherwise keep it in a locked room. At least two people will need to be present when counting cash and this needs recording and banking as soon as possible. How will you transport money after the event?

## **4. THINK ABOUT LICENCES, SAFETY, REGULATIONS AND INSURANCE**

### **Licences**

Find out about regulations early on in your planning. There are some events for which you need either to obtain a licence or to give prior notice in writing to the local authority, the police, or to the fire service. These include events involving:-

- Door to door or street collections
- Lotteries and raffles (although many, incidental, charitable lotteries are classed as exempt)
- Bingo
- Car boot sales
- Music and dance events

- Stage performances
- Films
- Sports events
- Bars
- Street parties
- Processions
- Meeting in public places
- Public address sound systems
- Performance of copyright music

Leeds City Council acts as the local licensing authority for licences and permits required by: the 2003 Licensing Act which covers alcohol and regulated entertainment, including temporary event notices; the Gambling Act 2005 which covers Lotteries and Amusements; and permits for street and house to house collections. See Appendix C for an outline and essential contact information. Make sure that you apply for any licences required in plenty of time.

### **Safety**

As event organiser, you have a responsibility for the health and safety of those who are taking part in your event, whether employees, volunteers or the general public. Managing risk is about taking a common sense approach to any hazards that might be involved in your event, however big or small, and putting systems in place to remove the risk or reduce it to an acceptable level. Carrying out a risk assessment is an essential part of this process – there are four key steps:-

1. identify the hazards/dangers/exposures
2. decide who might be harmed and how
3. evaluate the risks, deciding whether existing systems in place are adequate or whether safer systems are required
4. record your findings

If you are organising a major event, the HSE website, [www.hse.gov.uk/risk](http://www.hse.gov.uk/risk), has a wealth of information

Don't forget, if you are hiring a venue or using external suppliers, check that they have appropriate health and safety systems in place, and have carried out their own risk assessments.

### **Other Regulations**

If you are planning an event where food is being prepared and served, you may need to comply with Food Hygiene regulations. Leeds City Council's Environmental Health Services can provide specific guidance on food safety on the following telephone numbers:

Food Safety Enquiries:	0113 2477789
Food Poisoning:	0113 2476286
Email address:	<a href="mailto:env.health@leeds.gov.uk">env.health@leeds.gov.uk</a> .

Even if the regulations don't apply to your event, it is still good practice to follow the 4 C's, namely:

- **Cleaning** – effective cleaning of hands, equipment and surfaces to get rid or stop the spread of bacteria.
- **Cooking** – ensuring that food is thoroughly cooked and that reheated food is piping hot all the way through.
- **Chilling** – making sure that food is chilled properly and kept out of the fridge for the shortest time possible to stop harmful bacteria developing.
- **Cross-contamination** – avoiding the possibility of the spread of bacteria between food, surfaces or equipment. This often occurs when raw food touches or drips on to ready-to-eat food e.g. whilst holding a barbecue.

If you are organising a sporting event which takes place on the highway, road or a public place, check out The Good Practice Safety Guide published by the Home Office. It covers everything from use of barriers and traffic safety signs to emergency procedures.

[www.homeoffice.gov.uk/publications/police/operational-policing/event-safety-guide](http://www.homeoffice.gov.uk/publications/police/operational-policing/event-safety-guide)

If your event involves children or vulnerable adults, consider whether safeguarding is an issue. See the Introduction to Volunteering information pack for more on this subject.

### **Insurance**

Any event involving the public requires Public Liability insurance. This protects the organisation (or the members of the governing body) from claims made by volunteers, trainees or members of the public for death, illness, injury or loss or damage to property caused through the negligence of the organisation or someone working on it. It also protects volunteers/ trainees who may be sued as individuals for injury/ damage caused to a third party.

If you are a formally constituted group you may already have insurances in place. You still need to check that these will extend to include any claims arising from the event you are planning. If not, it may be possible to arrange a special activities policy to cover Public Liability, Theft of Money, even cancellation of the event due to adverse weather conditions.

- Don't make the assumption that your activities are covered by the insurance of the organisation whose building you have hired. Always check their policy to make sure you are fully covered.
- Shop around for insurance to find the best deal. Some companies offer specialist packages for the voluntary sector. Ask an Insurance Broker to find such a company for you.
- When completing a proposal form (application form for insurance), do so very carefully. Answer every question and make sure the information you have given is accurate. Failure to give all the relevant information, or misrepresentation of information, may cause the insurance company to refuse to pay out on a claim.
- Unincorporated Associations should remember that although insurance is taken out in the name of the committee of the organisation, the proposal form must be signed by an individual. State clearly that this individual is taking out the insurance on behalf of the organisation's Management Committee.
- Make sure you are up to date with premiums.
- Never admit responsibility for an accident even if you know you are responsible. Some insurance companies refuse to pay out if you accept liability without their permission.

## 5. PLAN YOUR MARKETING AND PUBLICITY

Our separate guides to Marketing and Public Relations (section 2) have a wealth of information on this subject. You need to consider what it is about your group and event that you want to market:-

- Who is likely to be interested in it (is your target audience – young, old, professional, general public, press, local residents)?
- How much money do you have to spend on it?
- Do you need posters or flyers? If so, who is going to print them? Where will you place them? Do you need to print tickets or invites?
- Have you thought about using the local media?
- If your budget is tight, there are a number of free marketing opportunities, including community listings, social media such as Facebook and Twitter, links through other people's websites and word of mouth.

Remember you don't need to wait until every last detail of your event is finalised before getting your publicity out.

## 6. SORT OUT THE DETAIL

Now is the time to add the detail to your outline plan. A detailed timetable of what is happening where and when is very useful.

Consider everything you will need for your event and ensure it has been reserved, ordered or printed as necessary.

Confirm all bookings in writing. It is advisable to have written contracts with major suppliers and sponsors setting out responsibilities, costs and cancellation rights.

Work out the number of people you'll need to help prepare for and carry out the event:-

- Which roles need skilled volunteers or just willing hands?
- What is the time commitment? When do you need them and for how long?
- Who will recruit, communicate with and organise them?
- How will helpers be transported? Will their expenses be covered?

Have cancellation and contingency plans. What happens if it rains? What if you don't sell enough tickets?

Think about communications. Who needs to be briefed before the event? How will you communicate with participants and contractors on the day? Do you need signage, a PA system? What if there is an emergency? Circulate key contact details in advance and let people know where and how to find you.

Appendix D Event Checklist has a list of prompts which you may find useful.

## 7. THE BIG DAY!

As a final check ensure:

- all fire exits and emergency routes are clear, any hazards have been removed and first aid provision is in place
- signage and directions are in place
- communications systems are working
- all materials and documentation are in place
- sponsors' branding is in place
- banking materials (float, cash box, receipt books etc) are stored safely and securely
- key contact numbers are to hand

Now brief your volunteers:

- Summarise key roles and areas of responsibility
- Identify first aider(s)
- Logistical information about the event e.g. timings
- Full information about venue and facilities (toilets, fire evacuation procedures, parking etc)
- Key people to alert if issues arise
- Emergency communication plan

During the event, ensure everyone is safe and enjoying themselves.

## 8. MOP UP AND REVIEW

Once the clearing up is done, there are still a few tasks to complete, including:-

- Collect and bank any money promptly and chase any which is outstanding
- Issue final press releases
- Send out thank you letters to helpers, sponsors and organisers, celebrating what you have achieved
- Distribute any remaining prizes

Make time to review your event objectives and targets, so that you can make recommendations for the future. Seeking feedback from volunteers and attendees can be really helpful.

## Appendix A:

### A - Z of Fundraising Ideas

<p><b>A is for:-</b> Abseil Aerobics Art exhibition Auction</p>	<p><b>B is for:-</b> Barbeque Back to front day Bike ride Book sale</p>	<p><b>C is for:</b> Car boot sale Carol singing Coffee morning Craft fair Competitions</p>
<p><b>D is for:</b> Dinner/Dance Dog walk Dress down day Dry cornflakes competition</p>	<p><b>E is for:</b> Easter egg hunt Egg rolling competition Exhibition</p>	<p><b>F is for:</b> Fancy dress Fashion show Fete Fortune telling</p>
<p><b>G is for:</b> Games Evening Garden Party Golf competition</p>	<p><b>H is for:</b> Hair Beading Hair shave Hill walking</p>	<p><b>I is for:</b> It's a knockout Ice cream eating Italian Evening</p>
<p><b>J is for:</b> Jazz Evening Jewellery sale Jumble sale</p>	<p><b>K is for:</b> Karaoke evening Kidnap and ransom Knobbly Knee contest</p>	<p><b>L is for:</b> Ladies Night Line dancing Lotteries</p>
<p><b>M is for:</b> Marathon dance Market stall Masquerade Ball Mystery tour</p>	<p><b>N is for:</b> Name the teddy Nature Walk Noodle sucking</p>	<p><b>O is for:</b> Odd jobs Onion peeling competition Open Gardens Orienteering</p>
<p><b>P is for:</b> Painting competition Pet show Pile of Pennies Plant stall</p>	<p><b>Q is for:</b> Quasar Night Question of sport Quiz Evening</p>	<p><b>R is for:</b> Raffle Reunion Rowing challenge</p>
<p><b>S is for:</b> Shocking sock/tie day Sponsored silence/slim/swim Sweepstake</p>	<p><b>T is for:</b> Themed night Tombola Treasure hunt</p>	<p><b>U is for:</b> Underwear party Uniform free day University challenge</p>
<p><b>V is for:</b> Valentine's day Video night</p>	<p><b>W is for:</b> Walking Wine tasting Window cleaning</p>	<p><b>X is for:</b> Xmas Fair Xmas Raffle Xtra special event</p>
<p><b>Y is for:</b> Yoga session Yard of Ale contest</p>	<p><b>Z is for:</b> Zany dress day Zombie Party</p>	

## Appendix B

### Calculating Ticket Prices

Here is an example of how to calculate your ticket price

#### 1 Calculate overheads (fixed costs)

Venue	£500	
Equipment hire	£250	
Printing	£250	
	-----	
Total	£1000	If you sell 10 tickets or 250 these costs remain the same

#### 2 Note other facts

- The maximum capacity of the venue is say 250 people
- The minimum projected ticket sale is 200 people
- Variable costs (catering etc) are £20 per head
- Overheads = £1000

#### 3 Base ticket price

Overheads		Minimum projected sales		Base ticket cost		Variable costs per head		Base ticket price
£1000	÷	200	=	£5	+	£20	=	£25

#### 4 Final ticket price

Add at least 30% to offer a reasonable profit and a limited contingency should you not reach projected minimum sales.  $£25 + 30\% = £32.50$ . Round up to sensible promotion price of £35 per ticket.

#### 5 Profit projections

Tickets sold – total costs = Profit

No of tickets sold	Cost per ticket	total sales	Costs	Total costs	Profit
100	£35	£3500	$100 \times £20 + £1000$	£3000	£500
200	£35	£7000	$200 \times £20 + £1000$	£5000	£2000
250	£35	£8750	$250 \times £20 + £1000$	£6000	£2750

## Appendix C

### a) *Licences and Permits*

#### Providing or Conducting Various Forms of Entertainment

Leeds City Council's Entertainment Licensing Section issues various licences and permits. The Council act as the Licensing Authority under the 2003 Licensing Act, granting licences associated with alcohol and regulated entertainment. Depending upon the type of entertainment you plan to stage, you may need to obtain an Occasional Public Entertainment Licence from Leeds City Council. This is required for all events that feature any one or a combination of the following types of entertainment as a main feature of the event: Pre-recorded music (relayed by any method of CD, mini-disc, cassette, record or radio), live music, Karaoke, dancing, cabaret or entertainment of a similar nature.

You can apply to the Council for the following licences and permits:

- 1) Licences/certificates issued under the Licensing Act 2003
  - Premises Licences - to authorise the following licensable activities:
    - Sale by retail of alcohol.
    - Provision of regulated entertainment.
    - Provision of late night refreshment.
  - Personal Licences - for individuals to allow them to authorise the sale and supply of alcohol in venues that have a premises licence.
  - Club Premises Certificates - to authorise certain activities at qualifying registered clubs.
  - Temporary Event Notices (TENs) - to permit temporary events to take place allowing certain licensable activities such as the sale of alcohol.
- 2) Licences issued under the Gambling Act 2005.
- 3) Lotteries and amusements.
- 4) Permits for street collections, house to house collections, scrap metal dealers, motor salvage operators and game dealer licences.

#### Temporary Event Notice

If you wish to hold an ad-hoc event in England or Wales, you must give a Temporary Event Notice (TEN) no later than ten clear working days before the event (not including the day the Council receives the notice, or the day of the event). If the premises where the event is to be held is in areas governed by two or more local authorities applications must be made to each. You must also give a copy of the notice to the police no later than ten working days before the event.

You must be 18 years or older to give a TEN and can give a maximum of five TENs per year. If you are a personal licence holder, you can give a maximum of 50 TENs per year. Your event must involve no more than 499 people at any one time and last no more than 96 hours with a minimum of 24 hours between events. The premise in question can have no more than 12 events per calendar year.

#### Holding a Street Event

Because highways can be dangerous places and provide access to individual properties it is recommended that you hold your event off the highway, in a hall, park, garden or something similar. However, if you cannot arrange for your event to be off the highway then you will be required to submit a road closure application form for approval at least six weeks before you want the closure or diversion.

The form, 'application for temporary traffic regulation order' can be obtained via a link on the Council's website entitled, 'Road and footpath closures and diversions'. Contact: Highways Services, Middleton Ring Road, Leeds LS10 4AX Fax: 0113 2478428.

When the application is received it will be assessed. Officers may need to meet with you, the police and possibly Metro depending on the request. If the request is approved there will be a charge of between £900 and £1300 for the traffic regulation order. The traffic regulation order follows a legal process that takes a minimum of three weeks to complete. Payment must be received before this can begin.

When closing a road and diverting traffic you must provide road signs and suitable barriers in accordance with Chapter 8 of the traffic signs manual published by the Department for Transport. You will need to agree a suitable diversion route with us and the Police. Access for emergency vehicles may be needed during a road closure.

Under normal circumstances, signs and barriers are placed by Leeds City Council Highway Services personnel. However, in certain circumstances the applicant will be responsible for the supply and placing of signs and barriers for road closures. Advice will be provided on where signs must be in placed. The cost of erecting, maintaining and removing diversion route road signs will be the responsibility of the contractor/company organising the works.

Other considerations that will need to be taken in to account for an 'outside' event are:-

- Before making an application gaining the support of home owners and businesses who will be affected by the closure including those who normally parked on the street(s) concerned.
- Consider the needs for emergency access, and the rights of individuals on foot. Request for roads which are bus routes are likely to be refused.
- Ensure that Leeds City Council is indemnified against all claims for accident or injury caused by, or in consequence of, the erection of the signs and barriers.
- Any damage which the Highway Authority considers has to be repaired then the organisers will be responsible for the costs.
- Ensuring that arrangements are in place for the appropriate recycling and disposal of waste either by those attending the event or by the organisers where large quantities are left after the event. Large quantities should be bagged and taken to any of the Council's 11 Household Waste Recycling Centres around the City, which are open 7 days a week, and where such waste can be conveniently disposed of free of charge.

### Special Event Liquor Licensing

At many celebrations, your visitors may want to enjoy an alcoholic drink(s). If your event is a street party the simplest way to ensure that everyone who wants to enjoy a drink is a BYO (Bring Your Own) arrangement, with each guest bringing along a selection of soft and alcoholic drinks to be shared amongst party goers. However, if you wish to sell alcohol at your event you will need to apply for either an Occasional Licence or Occasional Permission. For further details contact Licensing Section, Leeds District Magistrates, PO Box 97, Westgate Leeds LS1 3JP Telephone: 0113 245 9653

### Application forms and guidance

If you need to make an application under the Licensing Act 2003 you can find further information on the Council's Website: [www.leeds.gov.uk/licensing](http://www.leeds.gov.uk/licensing). The Section's telephone line is open Monday to Thursday 9am - 5pm and Friday 9am - 4:30pm on 0113 247 4095. Leeds City Council Licensing Section, Entertainment Licensing, Civic Hall, Leeds LS1 1UR. Telephone: 0113 247 4095 Fax: 0113 224 3885 E mail: [entertainment.licensing@leeds.gov.uk](mailto:entertainment.licensing@leeds.gov.uk) Website: [www.leeds.gov.uk/licensing](http://www.leeds.gov.uk/licensing)

## **b) Undertaking a raffle**

Raffles are held primarily to raise money for a particular item. It may be a new roof for your place of worship, community centre, sports equipment for your local team, or computers for your school, but usually it is for a good cause. Raffles are less time-intensive to organise than other types of fundraisers and less expensive to run. Such raffles can help boost your overall profits if held as part of a larger fundraising event.

### Small raffles

'Raffles' are considered to be a 'small lottery' in the eyes of the law, therefore, this means that you do not need a licence to hold a small raffle on the actual night of an event, as long as you meet these conditions:

- Any prizes purchased – as opposed to donated – are worth a total of no more than £250. However, donated prizes can be of unlimited value.
- All tickets are sold on the premises
- All tickets are sold on the night
- The raffle is drawn the same night
- The raffle is not the main reason for the event
- All of the proceeds apart from money spent on prizes and other necessary expenditures in organising the lottery must go towards supporting your group's activities or some other good cause
- There are no cash prizes
- Prizes containing alcohol are only included if the event is being held on licensed premises
- Tickets must not be sold for more than £2

Typically this sort of raffle would be held using basic cloakroom-style tickets, which only feature the ticket and book number. Slightly different rules apply for 'larger raffles'.

### Larger raffles

If you have read the guidelines above and your raffle does not fit into the category of small raffles then you may need a licence. As a guide, if you would like to sell tickets in advance, to members of the general public or have cash prizes then you probably do need a licence. Typically this sort of raffle features pre-printed tickets, which must feature the name of the charity and its registered charity number.

Contact the Council for information about obtaining a licence which is covered by the Gambling Act 2005. It may be that your venue already holds a licence, or you might need to apply for one from scratch. Remember to allow sufficient time for this process in your planning. Records should be kept of how many tickets were sold and unsold. The Council will tell you more when you apply for your licence.

The three categories of exempt lottery which do not require any kind of authorisation by a local authority are:

- Customer lotteries – business owners run these and only sell tickets to customers
- Private society, work or residents lotteries – tickets are only sold to members
- Incidental non-commercial lotteries – must be held at non-commercial events and all money must be given to a charity or fundraising group

Even within these exempt groups there are relevant rules and regulations that must be followed. If you're still unsure, consider contacting the Council's Licensing Section or the Institute of Fundraising on 020 7840 1000. The Section's telephone line is open Monday to Thursday 9am - 5pm and Friday 9am - 4:30pm on 0113 247 4095.

### House to House Collections

To carry out house-to-house collections for charitable purposes over a period exceeding 28 days in the Leeds area you need a licence from Leeds City Council. If you wish to carry out house to house collections for a period less than 28 days you can apply for a Certificate of Exemption from West Yorkshire Police.

Applications must be in the form prescribed by the local authority. You must be a fit and proper person.

### **NOTICE**

The above information should be used as a guidance tool. Only the courts can give an authoritative opinion on statute law. Every effort has been made to ensure this information is accurate but in an attempt to simplify the law, omissions have been made. Please refer to the Licensing Act 2003 and associated regulations for full details of the law. If you are still unsure or concerned about the matters raised in by the above guidance then you should seek your own legal advice.

## Appendix D Event Checklist

Timing	Action	Achieved
As soon as possible (ideally more than 2 months before)	<ul style="list-style-type: none"> <li>• Prepare budget breakdown for event</li> <li>• Agree a date</li> <li>• Select a venue and confirm availability</li> <li>• Carry out a risk assessment of the venue and arrangements</li> <li>• Arrange first aid cover if needed</li> <li>• Arrange insurance</li> <li>• Book venue</li> <li>• Check if alcohol or other licenses are required if applicable and apply in good time</li> <li>• Notify police/ambulance services/council if necessary</li> <li>• Make any necessary bookings with suppliers:- food, PA system, portaloos</li> <li>• Invite local dignitaries to attend</li> <li>• Seek volunteers to help on the day</li> <li>• Contact local paper and radio station and build up a relationship with the reporter</li> <li>• Organise press releases to announce the event, invite people to volunteer and buy tickets</li> <li>• Ask local companies for prizes</li> </ul>	
A few weeks before the event	<ul style="list-style-type: none"> <li>• Update the press and attract further supporters</li> <li>• Keep records of ticket sales and money received</li> <li>• Send out any information participants may need, tickets, map, letter, itinerary for dignitaries.</li> <li>• Draw up safety procedures and rotas needed</li> <li>• Plan the day of the event</li> </ul>	
A few days before	<ul style="list-style-type: none"> <li>• Notify the police of the numbers expected if necessary</li> <li>• Revisit and make final plans for your site</li> <li>• Assemble all your equipment</li> <li>• Brief your helpers and confirm safety procedures</li> <li>• Check all bookings and that all your needs are met (enough power sockets etc)</li> </ul>	
On the day	<ul style="list-style-type: none"> <li>• Re-brief helpers and check safety procedures</li> <li>• Set up site</li> <li>• Set up all signs/decorations and car park</li> <li>• Register all entrants/take entrance money or tickets</li> <li>• Welcome and thank the attendants</li> <li>• Check everyone is safe and enjoying themselves</li> <li>• Take photos</li> <li>• Clear up</li> <li>• Bank any money</li> <li>• Congratulate yourself and the team on a hard day's work</li> </ul>	
After the event	<ul style="list-style-type: none"> <li>• Send thank you letters to helpers</li> <li>• Send out final press release</li> <li>• Collect and bank any money</li> <li>• Send out chasing letters for any money owed if necessary</li> <li>• Celebrate such a successful event</li> </ul>	