

Board Report Creative Giving Project

Bernadette Murphy

1 September 2014- 20 January 2015

FTE 0.28 10hr per week

CHART North Stakeholder situation

Given the original knowledge gap in donor relationship understanding, which resulted in no/limited acquisition and high attrition rates, progress has been made over the last five months. Stakeholder organisations that embraced the resources presented to them, gained understanding of donor engagement, cultivation techniques and the positive benefits of regular communication.

Growing awareness, shifting from short-term transactions to long-term relationships.

Strategy

At a macro level, a universal approach to creating a 'Culture of Giving' has been implemented targeting the Arts, Culture and Heritage charitable sector as well as the business community.

To address the lack of philanthropic understanding and to create action, I brought together several people within different sectors of the Whangarei community to form a Philanthropic Hub.

Ros Martin	GM NCF (Fundraising sector)
Chris Carey	CEO CHART North (Arts, Culture and Heritage)
Tristan Tuckey	Owner/Designer Big Fish Creative (Arts, Culture, Heritage and Business)
Brian Kerr/Heidi Findley	Craig's Investment Partners (Business/sponsorship)

Our objective was to have an understanding of engagement with individual donors, corporates and the charitable sector, to develop philanthropy as part of the community 'norm' within Northland

At a micro level several stakeholders have taken the opportunity presented by CHART and experienced one on one mentoring, developing tools to implement fundraising programs within their individual organisations, whilst engaging their boards to understand how they too can actively be involved.

Listed below are the Key Performance Indicators requested by CEO, Chart North as stipulated for Contract 2 and outcomes at contract end.

Key Performance Indicators and Actions

Philanthropic Trust

Brief given: Initially the Charitable trust will serve the people of Whangarei. The long-term outcome is to serve Northland

CHART had recognised through consultation with the community that there are individuals and business that are willing to support the arts, culture and heritage sector as long as there is a safe and well developed mechanism in place to account for the spend.

- *Ensure Northland Foundation is set up to receive and handle donors and gifts for a Arts, Culture and Heritage fund and is relevant to stakeholders*
- *Develop, in partnership with Northland Trust, terms of reference for endowment fund, Gift acceptance policies & donor recognition Northland Foundation MOU.*
- *Develop and begin to execute a strategy for a sustained base of annual individual donors (long range vision and future fundraising goals)*
- *Prospect research and cultivation of a key donor to begin the giving processes*
- *Develop and oversee organisation of fundraising events and launch of a Philanthropic trust. CHART web site has options to donate*

It was recommended that CHART partner with Northland Community Trust to manage the fund, which will give all the benefits and services of having your own private foundation without having the expense of establishing a private trust. A named fund or a field of interest Fund can be established with the Northland Community Foundation by an initial substantial donation. This would be a fund that receives current use funds and endowment funds for investment growth managed by a portfolio manager under the terms of the NCF investment policy.

NCF, as part of the Philanthropic Hub see Arts, Culture and Heritage Fund as their next project, developed with CHART's support.

CEO CHART North requested scoping of successful models to help resolve some issues in the process of establishing Arts, Culture and Heritage Fund with NCF. Contact was made with the Auckland Communities Foundation. **However given the change in circumstances (internal strategic review at Board level), this KPI has now been directed as obsolete.**

Stakeholder's success

- *With the CEO and Creative Northland RADM (Regional Arts Development Manager) determine programme and capital needs that must be met from, or subsidised by fundraising campaigns, grants or related activities for at least six stakeholder organisations.*
- *Support these organisations as they develop a donor programme and assist with implementation.*
- *Ensure processes are in place to follow/clear instructions and procedures of the donor development strategies for the stakeholders engaged in the creative giving project (i.e. WIP Sheet)*
- *Develop written donor recognition policies regarding procedures for grants/trusts and donor relations i.e. Receipt and gift acknowledgment processes (to be available on CHART website)*
- *Develop timelines for the annual coordination of all activities and timelines for specific activities within individual stakeholder development plans (work with Rosie Rigar on implementing this timeline)*

I have worked with several stakeholders over the four-month period, and this service has been offered to all CHART affiliated organisations. Those who actively engaged were:

- Packard and Pioneer
- Waipu Museum
- Kiwi North
- Quarry Arts Centre
- Sistema and Whangarei Youth Music

Synopsis of engagement

- Explore their current communication touch points to a variety of audiences
- Discuss how to cultivate new relationships and engagement
- Create a 'call to action'
- Create an recognition event
- Support development of copy for the Support us webpage.
- Look at established relationships and how to move these through the donor cycle.
- Understand the importance of their vast volunteer base (potential donors and bequests as well as their most visible and viable fundraisers)
- Engage board members who will grow the portfolio of fundraising.
- Discuss the donor process and how to begin to grow their current audience base in to donors.
- Discuss projects that need funded and how to target an audience through Linkage, Ability and Interest.

Discussions have begun with Northland Youth Theatre.

Reyburn House I met with twice but there is reluctance from management to work with CHART North. Whangarei Art Museum was also unengaged, even after two contacts offering support.

Each organisation that has taken CHARTs offer of fundraising support has a **Work In Progress** document, which was created to establish how a **fundraising development** action plan might look. (Copies have been sent to Laura Burns.)

Further engagement/mentoring/support of implementation: one on one meetings when in Whangarei and Skype when needed.

I presented at Kiwi North board meeting, Waipu Museum board meetings (x3) and Quarry's January 2015 board meeting. Packard and Pioneer Museum have also created with my assistance a thank you letter, thank you email templates, donation insert and comprehensive feedback form for visiting organisations.

Sistema embraced the Science of Fundraising and within their volunteer base, enlisted a talented woman who has driven the social media and database management for development.

The stakeholders are enthusiastic and driven to learn more, wanting to implement this new knowledge; key to their economic viability and sustainability in the sector.

Policy was written over the Christmas/New Year hiatus and sent to the Chair of the CHART Board.

Key note speaker/workshop on prospect

- *Introduce prospect identification to the stakeholder groups, through advice and an organised workshop.*
- *Implement a database and donor management system through CHART North and educate the stakeholders on managing data entry and gift processing updating*

The demographic of the area has potential for smaller donations from the majority on a community giving level but there are also some prospective major donors in the region that could contribute significant amounts if solicited correctly.

A understanding of prospect research will help ACH organisations identify high-net-worth and philanthropic individuals who may be supportive of there projects, qualify prospective donors, and enhance the pipeline of major gift prospects.

Recommended prospect research tools: Open source on the Charity Website, Fund view and if possible Global Philanthropic Prospect Research and Wealth Screening

services.

Several prospect trainers have been contacted and quotes received regarding workshops, however CHART decided it was a costly option.

In place, a talented member of Sistema Whangarei with excellent skills in database management and research will present to stakeholder groups in February 2015 (CHART to liaise and confirm). This workshop will cover communications, donation processes and segmentation through Mailchimp and Facebook.

Sculpture symposium

- *Develop a sponsorship plan/package for the Sculpture Symposium 2016.*
- *Begin cultivation of potential sponsors for symposium*
- *Develop a comprehensive time line and project structure of the Sculpture symposium 2016, ready to be implemented by the project manager on appointment. Work with Trish*
- *Ensure smooth hand over to Sculpture Symposium Project Manager once appointed.*

The Sculpture Symposium has already been held successfully in 2010, 2012 and 2014. In 2016 CHART's intention is to grow this event with additional artists and with more public attending throughout the symposium.

I established a working with Liz Bridgeman, who manages the Te Kupenga International Biennial Stone Sculpture Symposium in Taranaki. This model we should aspire to for the Sculpture Symposium.

- *Develop a comprehensive time line and project structure of the Sculpture symposium 2016, ready to be implemented by the project manager on appointment. Work with Trish*
- *Ensure smooth hand over to Sculpture Symposium Project Manager once appointed.*

Working in collaboration with Trish Clark, it is recommended that CHART create a comprehensive time line and project structure for the Project manager once employed.

Potential sponsors of Sculpture Symposium

Big Fish Creative as an exclusive Partner who will provide Brand development for a small contract fee and all other creative support as Pro Bono.

Tristan is already involved in the Philanthropic Hub and has expressed interested to his involvement in the Symposium.

Craig's Investment Partners (CIP) Whangarei

Cultivation has begun through contact with Brian Kerr and Heidi Findley, Senior Investment Advisors, CIP Whangarei.

A positive relationship has been formed with Brian and Heidi, who has expressed interest in supporting the symposium as a major Whangarei event. Brian is assisting with the sponsorship proposal that he and Katy Brown (CHART Chair) will present to Auckland CIP office. CHART will be asking for \$20k with the intention of securing at least \$15k

Other Successes

One other successful outcome was the Malcolm Rands event, which all members of the Philanthropic hub supported in some capacity, whether financially or work provided. This event was a starting point in bringing the business sector into the fold.

Malcolm Rand was CHART North's guest speaker, in partnership with North Tec. Malcolm shared his experiences as creator of the Fairground Philanthropic Trust, entrepreneur and an active member of community engagement. Malcolm is originally from Whangarei –a businessperson who has who has 'done good'.

This event was essential to engage the Business sector with community, creating some understanding of giving and collaboration. I worked closely with North Tec and engaged the Chamber of Commerce who were both pleased with the positive outcome and feedback. Both organisations expressed interest in working further with CHART on community and business engagement.

David Wilson, CEO of Northland Inc. also attended.

It is suggested CHART would be in a positive position if they were to develop a deeper understanding of the economic impact a well-supported Arts, Culture and Heritage sector would have on the Northland community, and the long term benefits of the associated social outcomes.

A successful relationship has been formed with Ros Martin from Northland Community Foundation and together we liaised with the Fundraising Institute of New Zealand to provide fundraising training in the Northland area. Ros has also suggested CHART and the Philanthropic Hub work together regarding the Stephen Tindall event in February.

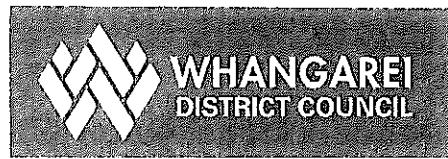
One has to also note that feedback from stakeholders was consistent regarding the CHART positioning within the sector. As much as they were please and encouraged by the resource of a fundraiser to guide development processes, few people understood what CHART actually provided/did. There was an element of mistrust and confusion.

This has positively shifted somewhat over the months, and the Internal Review will support CHART's future positioning, strengthen relationships with community.

Conclusion

CHART North, through engaging the services of a fundraising contractor, has begun the process of creating greater understanding of fundraising practices within its stakeholder groups, which in turn will help ensure sustainable organisations moving in to the future.

Bernadette Murphy
20 January 2015



Memorandum of Understanding

**Whangarei District Council and
CHART (The Culture, Heritage and Arts Resource Trust)**

Memorandum of Understanding

Between

Whangarei District Council – referred to as “Council”

and

CHART (The Culture, Heritage and Arts Resource Trust)

This Memorandum of Understanding supersedes any such similar agreement that exists between the two parties.

1. Introduction

CHART was established in 2010 to enable the community to develop and progress long-term strategies to support and build capacity in the arts, cultural and heritage sectors (“the sectors”).

CHART takes a collaborative approach to build programming, infrastructure and provide strategic guidance to leaders in the sectors and works alongside thirteen major organisations within the Whangarei District.

CHART has an approved advisory process to provide assistance with funding applications, governance, management support, relationships, development and community liaison within the sectors.

CHART is a specialist resource available to Council as an advisory body and to advocate on behalf of the cultural, heritage and creative industries within Whangarei District.

CHART through its activities contributes economic benefits to our communities.

CHART has identified a number of responsibilities including:

- A commitment to developing a vibrant and sustainable high profile arts, heritage and cultural sector in Whangarei District.
- To grow, support and maintain partnerships that recognise the unique characteristics and cultural values of the Whangarei District.
- To be responsive to key sectors in the community to promote collaborative initiatives that build growth, sustainability and economic well-being for the Whangarei District.

Under the Trust Deed the number of trustees must be no less than 6 or more than 10 trustees.

Two to four potential trustees can be nominated and seconded by any member who is elected at the Annual General Meeting.

One Trustee to be appointed by the Whangarei District Council in consultation with the Chairperson of CHART.

Two to four trustees to be appointed or nominated by the Appointments Committee (portfolio) who are considered to have the skill, drive, and ability to assist with the management and objectives of the Trust.

One co-opted Trustee may be appointed by the Board at its discretion and appointed at any time as long as the maximum number of trustees is not exceeded.

2. Scope of the Memorandum of Understanding

The geographical scope of CHART as stated in the Trust Deed extends to all of Northland. The scope of this memorandum is confined to CHART’s activities within the Whangarei District.

3. Commitments

Whangarei District Council (WDC)

In recognition of the relationship that Council has with the Trust, Council agrees to financially support CHART’s activities through:

- Providing an Annual Operation Grant, through Council’s Annual Operating Fund, on an agreed annual business plan prepared by the Trust and in compliance with the conditions of the fund.

- Promoting the work of CHART where appropriate in marketing material prepared by Council.
- Nominating a Council officer to work with CHART to review the restoration of the 'Old Library'.

Culture, Heritage and Arts Resource Trust (CHART)

In accordance with its deed, and to recognize CHART's significance in enhancing the Whangarei District as a prime arts, culture and heritage destination, CHART agrees to:

- Maximise opportunities that grow the creative sector in Whangarei District.
- Facilitate the philosophy of the Arts, Culture and Heritage strategy for the creative community of Whangarei District.
- Deliver the Whangarei Sculpture Symposium , Art Beat and other district events.
- Support, Cultural, Heritage and Arts events and organisations including the following stakeholder groups: The Whangarei Art Museum Trust (Whangarei Arts Museum), Northland Craft Trust (The Quarry Arts Centre), Northland Society of Arts Incorporated (Reyburn House), The Blue Goose Papermill Charitable Trust (The Papermill), Northland Youth Theatre Trust (Northland Youth Theatre), The Hihiaua Cultural Centre Trust (Hihiaua Cultural Centre), Whangarei Youth Music Incorporated (Whangarei Youth Music), Te Kowhai Print Trust, Anawhata Museum Trust (The Packard and Pioneer Museum), Whangarei Museum and Heritage Trust (Whangarei Museum and Kiwi North), Northland TV Charitable Trust (Channel North).
- Seek external funding opportunities to leverage Whangarei District's creative capital.
- Oversee the governance and management of the Old Library to support sustainability.
- Be available to Council staff to assist with specialist advice on arts, cultural and heritage matters.
- Report quarterly (template provided) to the Community Services Department of Council.

4. Term

This agreement will take effect upon execution by both parties and will remain in effect for a period of three years, when it will be reviewed by both parties, or until superseded by mutual agreement between the parties, or cancelled by one party advising the other in writing.

5. Liaison

To ensure coordinated liaison on operational matters; the Chief Executive Officer (WDC) will appoint a staff member to be the contact person for CHART activities.

This person will also attend Trust meetings, in conjunction with the nominated councilor, as and when required, but has no voting rights. This will allow Council officers to keep up to date with delivery of the Business Plan outputs and ensure a "no surprises" relationship.

Signed by:

Mark P. Simpson

CEO: Whangarei District Council

Date:

Hinurewa Te Hau

Chair: CHART (The Culture, Heritage and Arts Resource Trust)

Date:

Annual Operating Fund

Quarterly Community Event Reporting – CHART

Quarterly reporting – required by the 20th of:

- September (for 20 Jun to 19 Sep),
 - December (for 20 Sep to 19 Dec),
 - March (for 20 Dec to 19 Mar) and
 - June (for 20 Mar to 19 Jun).
- or as otherwise agreed with Community Services.

Please return the completed form to carlai@wdc.govt.nz and bree.kurtovich@wdc.govt.nz.

Events to be reported on include any art, culture or heritage activities directly or indirectly supported by the Annual Operating Fund. These can include, but are not limited to: exhibitions, events, shows, initiatives, workshops, seminars, lectures, open days and classes.

Please add extra rows if needed.

Last three months – activity details

Name of activity	Date/s of activity	Cost of the activity	Marketing approaches used	Customer satisfaction data collected
CHART Initiatives:				
Fundraising Workshop	✓ 6 June	Paid manager for creative giving – free to attendees	Invitation only for stakeholders – 18 attendees	Yes - emails
Chorus Boxes Public Art Installation	✓ On-going	FREE	Facebook, newsletter, newspaper – 12 artists paid/viewed by whole community	Yes - Facebook emails
Second Craft internship negotiated: Hanna Easton With Greg Barron	✓ July onwards	\$~~~	people	Yes - Letters

Collaborative work - evidence

SUP App development: Chart North, Channel North and Creative Northland Collaboration	On-going	Approx. \$12,000 to date	Launch program in development- CHART staff/Channel North Staff/Big Fish	Not yet
The Poetry Walk Project	First stage of Part two completed	\$5500	Facebook, newsletter, newspaper -25 submissions/two selectors/CHART Staff	Community Feedback
Assisted with Volunteer Week	May	Free	Facebook, newsletter, newspaper - All CHART Staff/CEO Chair of WW	Not yet
Youth Summit	23-24 May	\$46,691.55	Posters, A0 +A3, 1000 Stickers, 150 Tote Bags, Radio Advertisement, Newspaper stories and advertisements: Advocate + Northland Age. Event stories: Advocate, Report, Northland Age, The Wireless Radio NZ – 100 Youth Attendees/25 support people/All CHART Staff	Yes - Collated feedback forms
Youth Summit Projects WD:				
Pepi Pride	On-going	\$500	Program in development - 12 Youth	Not yet
Busted	On-going	\$500	Program in development- 12 Youth	Not yet
Paint the town	On-going	\$500	Program in development - 15 Youth	Not yet
Message in a bottle	On-going	\$500	Program in development- 15 Youth	Not yet
Bomb the bottle	On-going	\$500	Program in development- 15 Youth	Not yet

Last three months – stakeholder support provided (including specialist arts advice to Council and Council staff)

Note: CHART's MOU with WDC includes agreement to provide support to the following stakeholders: Old Library, Whangarei Art Museum, The Quarry Arts Centre, Reyburn House, The Papermill, Northland Youth Theatre, Hihiaua Cultural Centre, Whangarei Youth Music, Te Kowhai Print Trust, The Packard and Pioneer Museum, Whangarei Museum and Kiwi North, Channel North, and Creative Northland.

Organisation/group/individual supported	To do what?	Support provided by CHART
Hihiaua Cultural Centre	Project Build Planning/application – work directly with Board – 3 people	Administration/funding assistance
Whangarei Youth Music	Philanthropic event - work directly with Board – 4 people	Administration
Packard and Pioneer LTP	LTP Submission Support work directly with Co-ordinator	Administration/funding assistance/advice
Whangarei Museum Fundraising Support	Fundraising Support - work directly with Co-ordinator	Administration
Whangarei Art Museum	Matariki Installation/letters of support – CHART	Administration

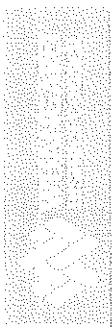
	Staff	
Reyburn House	Promotional Support work directly with Co-ordinator	Administration
Waipu Museum	Festival Support work directly with Co-ordinator	Administration
Te Kowhai Print Trust	Governance Support work directly with Co-ordinator and Board	Administration
The Quarry Arts Centre	Capital Project Assistance work directly with Manager	Administration
Northland Youth Theatre	Governance- work directly with Manager	Creative Northland Manager sits as CHAIR
The Paper Mill:	Philanthropic Planning- work directly with Manager	Administration
Old Library Community Centre	Fundraising Management (* see below) Management and administration from CHART x2 people	Administration
Channel North	App build and Promotions x1person	Administration
Whangarei District Council	Project Planning Matariki, Public Sculpture x2 people from CHART	Administration
Community Support:		
Nicola Muir	CNZ Funding Application Prep x1 person	Administration
Volunteer Whangarei	Volunteer Week- assistance with funding and stall x 2 people	CHART CEO sits as chair/ Administration.
Aaron Hoskins	Art Wall Installation x1 person set up/viewed by all visitors to CHART/sales generated	Administration
The Vault Exhibition	Lenny Muripaenga - 50-60 visitors/sales generated	Administration
The Butter Factory	Bookings	Administration
Daniel Matene	Creative Communities Application	Administration
Whangarei Music Society	Promotions	Administration
Whangarei Film Society	Promotions	Administration
The Shutter Room	Promotions	Administration
* OLD Library Management		Management and administration support
Craft Markets every saturday– Public event 400 per event		Management and administration support
Midday Music – 12 people per event weekly		Management and administration Support
Book Launch – 30 people		Management and administration Support

	Fast Fibers Poetry Night – 20 -30	Management and administration Support
	Service Day Pompallier	Management and administration Support
Zumba		Management and administration Support
		Management and administration Support
Yoga		Management and administration Support
Pilates		Management and administration Support
	CHART Board Workshop -15 people	Management and administration Support
	Love your water seminar -	Management and administration Support
	Matanui Community Show	Management and administration Support
	La Belle Alliance	Management and administration Support
		Support
Old Library Fundraising	ASB Community Trust \$20, 000, WDC Community Fund, Lotteries, Oxford etc.	Administration/Application prep

Creative Northland	CA5 Kaitaia - 20 people	Event management
	Northland Youth Summit - 125	Event management Administration
	Bitches Box Consortium Tour w/ Mel Parsons - 250 people	Event management
	Culture Segmentation for Audience Development – 10 people	Management
(Regional Arts Development Manager Annual Leave)		
Chamber of Commerce board Meeting		Staff member on Board
Business awards sponsorship commission trophies and judges x5 peoples		management
51 st Dates ticket Sponsorship		Support
FIFA u20's x 1 staff member		Support
Matariki Video Installation by Karen Sydney - production team/CHART staff/Art Museum staff/Artists being filmed x7		Sponsorship and Support

Last three months – summary

Total visitors/participants	Unquantifiable
Total number of events	18



Other funding sought	\$83,500 (ASB, COGS, Creative Com)
Other funding received	\$20,000 (Asb Old Library)
What has gone well?	Northland Youth Summit & Stakeholder philanthropic funding workshop.
What has not gone well?	The Poetry Walk Project is proceeding, but has not had much buy in this time round.
Anything else you would like us to know about?	Chart is an integral part of the Hihiaua Cultural Centre workforce, preparing documentation to support the capital project.

Next three months – activity details

Name of activity planned	Planned date/s of activity	Marketing approaches planned	Customer satisfaction collection planned
Sup App Launch	Sept	Full campaign, road show; launch event, posters, stickers, billboards, DL fliers, Web campaign. Stories on TV & Newspapers, radio sponsorship.	Testing period
Creative Communities Application Support	Aug	N/A	Feedback form
Northland Youth Summit Projects: Pepi Pride, Busted, Bomb the Boat, Paint The Town, message in a Bottle.	Aug/Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Manawahine Master Class Workshops	July	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Manawahine Production	July	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Matariki exhibition	July	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Whale Rider	Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Chamber of Commerce Board Meeting	July	N/A	N/A
Sup App Launch	Sept	Full campaign, road show; launch event, posters, stickers, billboards, DL fliers, Web campaign. Stories on TV & Newspapers, radio sponsorship.	Testing period
Audience Development Workshop Auckland	Sept	Invitation	Feedback form

FIFA Art Competition	Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Old Library:			
Children's Music Series	Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Off The Cuff refurbishment	July	N/A	N/A
Front of House construction	Aug	N/A	N/A

Breakdown of events at Old Library

Name of activity	Date/s of activity	Description of event, activity including any highlights	# contributors/stakeholders (e.g. artists / speakers)	# stakeholders/volunteers involved	# participants (children/ adults/ seniors etc)	\$ cost to participate (children/ adults/ seniors etc)
Craft Markets	24 th May, 7 th and 21 st June	Inside winter markets for Crafty people wares	40	2	200	0
Midday Music	Every Wednesday	Lunchtime Music Concert	2 – 12	2	5-35	Gold Coin
Book Launch	25 th May	Book Launch for Peri Hoskings.	1	1	30	0 with expectation to buy books
Fast Fibers Poetry Night	29 th May	Poetry Group with guest poets and readings	2	2	20 – 30	Gold Coin
Service Day Pompallier Zumba	6 th June	Clean up day at the Old Library	2	13	12	0
Yoga	Every Tuesday	Zumba Class	1	1	10 – 12	10 per person
Pilates	Every Tues – Thurs	Hatha Yoga classes for all ages, Fitness levels and abilities	2	2	40-50	5 per person
	Mon-wed-Fri	Pilates classes for all ages, Fitness levels and abilities	1	1	10 – 20	15 per person



CHART Board Workshop	10 th June	Private Meeting	10	10	10	0
Love your water seminar	11 th -12 th June	Public meeting on water quality	3	3	1	0
Matanui Community Show	12 th June	Theatrical show about the dangers of Suicide	4	4	18	0
La Belle Alliance	15 th June	Tri of performers, Vocal, Piano and Violin	3	5	42	<i>25 per adult, 10 per child/student</i>
Stage Challenge	20 th June	Green Room Use of Te Studio	3	60	60	N/A

Waipu Museum: Project tracking sheet

Tuesday, 3 February, 2015

Development: Acquire new donors and further engage current donors to build sustainable funding streams. Develop further sponsorship and partnership revenue and relationships

Segmentation				Notes
Area of Development	Planning/progress	Responsibility	Time line	
Newsletter- currently 300 subscribers. People sign up at \$10 each annually	0% progress			<p><i>Friends of Waipu Museum Subscriber base</i></p> <ul style="list-style-type: none"> • insert donation line option on renewal form so all subscribers have option to be a donors <p>For as little as \$10 annually (same benefits)</p> <p>Action: donor ask once yearly</p>
4 newsletters contacts a year				
Current Revenue: \$3000				
#if <i>Friends of Waipu Museum option on Donation Brochure- may increase uptake and increase revenue</i>				
Cultivation				These are the official donors who will be invited to donor events, special mailings etc
Analyze spread sheet of all subscribers and pull out				



subset of donors (those who subscribe and donate)	<p>Start to build a relationship with them</p> <p>Action: ask to one event per year as a special supporter of Waipu Museum</p> <p>Will continue to receive 4x newsletters annually</p>
	<p>Mail out to descendants to ask if they would like to be a subscriber and receive the benefits: news letter 4 times per year</p> <p>May lead to extra revenue- if they included a donation they become donor.</p> <p>Re-establish strong connections with descendants</p> <p>Genealogist develop connections (not currently active)</p>
Cultivation-Genological Database: Currently 13000+ 79000 names (deceased and alive) Most people over the age of 45 yrs	



CULTURE HERITAGE ARTS RESOURCE TRUST	
Create giving options especially bequest	<p>Legacy Option on Donation Brochure</p> <p>Create a legacy programme</p> <p>Special legacy event annually</p> <p>Legacy Pins</p>
<p>55+ years- a legacy mailing (cultivation)</p> <p>Need one for current donors and one for lapsed donors</p> <p>Lapsed Donors re-engagement</p>	<p>0% progress</p> <p>Supporters list</p> <p>(What do they receive for this?)</p> <p>Can we split any donors from this list?</p> <p>Donors (maybe 50) in 2014= \$6000</p> <p>Compile list of all donors for last 5yrs (or longer if possible) and cultivate as donors</p>

- Re-engagement with Donors, members and other**
- Pre-christmas letter- plans for 2015 , exciting news Waipu games etc
- Acquisition:**
- visitors book- gather information
 - Send newsletter (ensure unsubscribe option on e-newsletter)

Segmentation (Groupings) for communication

Friends of Waipu Museum subscribers (\$10) 4 x newsletter annually

Descendant subscribers(\$10) 4 x newsletter annually

Subscriber Donors who give over \$10 4 x newsletter annually, Recognition event

Descendant donors who give over \$10

Lapsed donors

Ask: March- direct ask in newsletter for??

Hard Copy Collateral

Area of Development	Planning/progress	Responsibility	Time line	Notes
Donation Brochure				
Create Giving options for				



people	Heritage Fund??	Legacy Fund	Friends of Waipu	Soft Copy Collateral
Area of Development	Planning/progress	Responsibility	Time line	Notes
Donate now on webpage				<i>Patsy (or person who manages Social media) to attend Michele workshop FB page and import contacts into mail chimp or database of some sort.</i>
FB page				
				Events
Donor Event – Annual				
				<i>Recognition event- thank you Christmas BBQ as the point of difference for Donors- special invitation.</i>
				<i>Not all come but will keep/increase giving due to connection</i>



Art N Tartan' Wearable art awards	Explore sponsorship relationship- can we do it better? What needs to be different if anything?	Guest designer? Kate Sylvester (Scottish heritage?) Heavy marketing in Whangarei /Auckland?	
Sponsorship: relationship management	Packages		
Promote to their databases	Sponser pre event: bring clients		
Face book build up starts now...create a buzz	Promotional flyer calling for applications-Face book page		
Other Actions			
Develop policy regarding receiving donations	0% progress		
HR development		Fundraising development support	\$20K needed for admin



			support
Capital needs: Expand museum (admin and exhibit space)- covered			Frees up Patsy fro WW1 project
Will need more ASB comm Trust			
Create an understanding about the Culture of Fundraising with stakeholders and board			

Measures:

KPI March April/2016

Donation increase for 10% increase in giving

Donor acquisition- increase by 10 %

WW1 project??

NOTES

Sending out booklet to all art wear sponsors

Thank you

Hand written line for personalised letter

Anna will start Jan to speak to sponsors again.

\$1000K giver – photos?? Legacy

Chris Jones (database person)

Descendants as potential main target base for donor development



CULTURE HERITAGE ARTS RESOURCE TRUST



Summary of Stakeholder Support as per the Memorandum of Understanding with Whangarei District Council 2013-2014

Overview

In the 2014 year our key stakeholders were supported at various levels with funding applications, marketing, governance, management support, relationship development, and community liaison within the sector (Whangarei District Council and CHART (The Culture, Heritage, and Arts Resource Trust), 2013). Our key stakeholders were also encouraged to engage with the Creative Giving Project. For some stakeholders this led to new initiatives, collaborations, projects, and relevant documenting processes.

A leading initiative was the Creative Giving Project, which had a strong focus on Philanthropy and establishing a growing awareness of long-term relationship building. This encompassed information about individual donors, corporates, the charitable sector and how to engage in an ongoing conversation.

Collaborative approaches focused on various levels of capacity building in the Arts, Cultural and Heritage sectors. As we will discuss in the summary report this included support from funding applications to community liaison. The key areas reported on provide an insight into the successes for CHART and our Stakeholders over the last year. It also highlights some key areas CHART will be developing as we move into 2015. Specifically in regards to gathering further evidence based reporting and quantitative data for reflective practice.

The following provides an overview into what CHART's support looked like for our Key Stakeholders in relation to the Creative Giving Project.

Synopsis of engagement (Creative Giving Project)

Explore their current communication touch points to a variety of audiences
Discuss how to cultivate new relationships and engagement
Create a 'call to action'
Create recognition event(s)
Support development of copy for the Support Us webpage.
Look at established relationships and how to move these through the donor cycle.
Understand the importance of their vast volunteer base (potential donors and bequests as well as their most visible and viable fundraisers)
Engage board members who will grow the portfolio of fundraising.
Discuss the donor process and how to begin to grow their current audience base in to donors.
Discuss projects that need funded and how to target an audience through Linkage, Ability and Interest.

Stakeholder's key to success (Creative Giving Project)

Work with the CEO and Creative Northland RADM (Regional Arts Development Manager) to determine programme and capital needs that must be met from, or subsidised by fundraising campaigns, grants or related activities.
Support their organisation as they develop a donor programme and assist with implementation.
Ensure processes are in place to follow/clear instructions and procedures of the donor development strategies for the stakeholders engaged in the creative giving project (i.e. WIP Sheet).
Develop written donor recognition policies regarding procedures for grants/trusts and donor relations i.e. Receipt and gift acknowledgment processes (to be available on CHART website).
Develop timelines for the annual coordination of all activities and timelines for specific activities within individual stakeholder development plans (work with the Funding and Projects Co-ordinator on implementing this timeline).

Individual Stakeholders Support and Success

The following provides a sample of what CHART's support looked like for our Key Stakeholders in relation to the Memorandum of Understanding with the Whangarei District council. It also highlights some specific examples from their engagement with the Creative Giving Project;

The Whangarei Art Museum Trust (Whangarei Art Museum)

CHART initiated the Matariki collaborative Project, which was an exhibition held in June 2014 for the Seven Sisters- Maori Women storytellers of Te Tai Tokerau. Procured through ASB Community Trust and curated by CHART hosted and exhibited by the Museum.

CHART scheduled '*He Korero*' (Black Rainbow Visual Exhibition) which was a musical event featuring public music sessions from October through to December in 2014. The performers were sourced and the public programme was scheduled and facilitated by CHART.

The feedback at the museum was extremely positive, with some visitors telling a Creative Northland representative that they had never been in a museum before, but had a connection to one of the artists features in the installation. The success of this collaborative effort is emphasized by the fact that the Seven Sisters Installation has accepted an invitation to tour the UK , London and Liverpool in June 2015. (*Laura Burns -2014*)

○
Philanthropy (the Creative Giving Project); Engaged and attended CP3 Meeting and offered collaborative support to other key stakeholders including assistance with Te Kowhai Print Trust and the potential to collaborate alongside an artist in residence programme, with Te Kowhai Print Trust and Northland Craft Trust.

Northland Craft Trust (The Quarry Arts Centre)

CHART assisted with support on the steering committee for FOLA (Festival of Light Art) and collaboration on the Quarry Art's Centre and Te Kowhai Trust Futures Project.

CHART supported with Capital Project assistance; the Quarry Arts Centre Membership Project where we acted as a sounding board for successful ideas and concepts presented by the Manager at the Quarry.

Philanthropy (the Creative Giving Project);
The Quarry Arts Centre attended the CP3 Meeting with the other stakeholders.

Northland Society of Arts Incorporated (Reyburn House)

CHART acts a Facebook administrator assisting with promotional support alongside the Co-ordinator at Reyburn House.

Previously in the 2013 year CHART supported a successful funding application to Pub Charities for an overhaul of the stakeholders website.

Further funding assistance has not been required from CHART in 2014, however we have continued to offer assistance with general marketing, poster e-news and facebook support.

Philanthropy (the Creative Giving Project);
Northland Society of Arts Incorporated has not requested or engaged with the Philanthropic support that CHART has offered.

The Blue Goose Papermill (The Papermill)

CHART continues to offer peer to peer support and advice encompassing marketing, posters, e-news and social media.

Philanthropy (the Creative Giving Project);
The Papermill engaged with and attended the CP3 Meeting. They have been working on their Philanthropic Planning, which is ongoing.

Northland Youth Theatre

CHART continues to offer peer-to-peer support and advice encompassing marketing, posters, e-news and social media.

Governance level assistance - Creative Northland Manager sits as chair.

Philanthropy (the Creative Giving Project);

Northland Youth Theatre engaged with and attended the CP3 Meeting. They have been working on their Philanthropic Planning, which is ongoing.

The Hihiaua Cultural Center Trust (Hihiaua Cultural Center)

CHART has supported the Hihiaua Cultural Center with administration, funding assistance, Project Build Planning and application processes working directly with the board.

CHART compiled and assisted funding applications with local and national funding bodies. These funding bodies include; ASB community Trust, Oxford Sports Trust.

CHART also offers a scholarship to the Sculpture Symposium (CHART Event) to a student of *Whare Whakairo (The Carving Shed)*. This opportunity enabled a carver in 2014 to launch his career (Kawhiti Wiremu) with a commission to create the awards for the Westpac Northland Chambers of Commerce Awards.

Philanthropy (the Creative Giving Project);
Hihiaua Cultural Center engaged with and attended the CP3 Meeting. They have been working on their Philanthropic Planning, which is ongoing.

Whangarei Youth Music Incorporated (Whangarei Youth Music)

CHART has supported **Whangarei Youth Music** with administration, funding assistance, peer-to-peer advice encompassing marketing, posters, e-news and social media.

CHART specifically assisted with the painting of the large format mural on the side of their premises through support of the artist commissioned.

CHART and Whangarei Youth Music collaborated during the Whangarei Sculpture Symposium, with the stakeholder providing amenities throughout the 10 days of the Symposium.

Philanthropy (the Creative Giving Project);
Whangarei Youth music is supported with exposure during ArtBeat (CHART Event) including all day performances and scheduling.

'Sistema (Whangarei Youth Music Initiative) embraced the Science of Fundraising and within their volunteer base, enlisting a talented woman who has driven the social media and database management for development' (Murphy, 2014).

Te Kowhai Print Trust

CHART has supported **Te Kowhai Print Trust** with administration, funding assistance, peer to peer advice encompassing marketing, posters, e-news and social media.

A CHART staff member supports Governance and provides assistance with funding applications locally and nationally including; Lotteries, ASB Community Trust, and Pub Charities. Accounting assistance and working on the collaborative Futures Project with the Quarry Arts Centre.

Successful funding applications supported by CHART in the 2014 year enabled Te Kowhai Print Trust to establish a Technicians role to support their education and printmaking programmes.

Anawhata Museum Trust (The Packard and Pioneer Museum)

CHART worked with The Packard and Pioneer Museum on their long-term plan and submission support in the 2014 year.

Other assistance included; administration, funding assistance and advice working directly with the Co-ordinator, peer to peer support and equipment loans.

Philanthropy (the Creative Giving Project);
The Packard and Pioneer Museum engaged with and attended the CP3 Meeting.
They have been working on their Philanthropic Planning, which is ongoing.

'Packard and Pioneer Museum have created with CHART'S assistance a thank you letter, thank you email templates, donation insert and comprehensive feedback form for visiting organisations' (Murphy, 2014)

Whangarei Museum and Heritage Trust (Whangarei Museum and Kiwi North)

CHART has supported Whangarei Museum and Heritage Trust with marketing, posters, e-news and social media.

Philanthropy (the Creative Giving Project);
Whangarei Museum and Kiwi North engaged with and attended the CP3 Meeting. A presentation was held at the Kiwi North Board in relation to the Creative Giving Project.

Northland TV Charitable Trust (Channel North)

In 2014 Chart facilitated successful grant applications through ASB Community Trust. These grant applications supported the collaborative projects such as the SUP application build and Northland Youth Summit.



Annual Operating Fund

Quarterly Community Event Reporting – CHART

Quarterly reporting – required by the 20th of:

- September (for 20 Jun to 19 Sep),
- December (for 20 Sep to 19 Dec),
- March (for 20 Dec to 19 Mar) and
- June (for 20 Mar to 19 Jun).

or as otherwise agreed with Community Services.

Please return the completed form to carlaj@wdc.govt.nz and bree.kurtovich@wdc.govt.nz.

Events to be reported on include any art, culture or heritage activities directly or indirectly supported by the Annual Operating Fund. These can include, but are not limited to: exhibitions, events, shows, initiatives, workshops, seminars, lectures, open days and classes.

Please add extra rows if needed.

Last three months – activity details

Name of activity	Date/s of activity	Cost of the activity	Marketing approaches used	Customer satisfaction data collected
CHART Initiatives:				
Fundraising Workshop	6 June	Paid manager for creative giving –free to attendees	Invitation only for stakeholders – 18 attendees	Yes - emails
Chorus Boxes Public Art Installation	On-going	FREE	Facebook, newsletter, newspaper – 12 artists paid/viewed by whole community	Yes - Facebook emails
Second Craft Internship negotiated: Hanna Easton With Greg Barron	July onwards	\$1000	Newspaper – 3 people	Yes - Letters



SJP App development: Chart North, Channel North and Creative Northland Collaboration	On-going	Approx. \$12,000 to date	Launch program in development- CHART staff/Channel North Staff/Big Fish	Not yet
The Poetry Walk Project	First stage of Part two completed	\$5500	Facebook, newsletter, newspaper -25 submissions/two selectors/CHART Staff	Community Feedback
Assisted with Volunteer Week	May	Free	Facebook, newsletter, newspaper -All CHART Staff/CEO Chair of WW	Not yet
Youth Summit	23-24 May	\$46,691.55	Posters, A0 +A3, 1000 Stickers, 150 Tote Bags, Radio Advertisement, Newspaper stories and advertisements: Advocate + Northland Age. Event stories: Advocate, Report, Northland Age, The Wireless Radio NZ - 100 Youth Attendees/25 support people/All CHART Staff	Yes - Collated feedback forms
Youth Summit Projects WD:				
Pepi Pride	On-going	\$500	Program in development -12 Youth	Not yet
Busted	On-going	\$500	Program in development -12 Youth	Not yet
Paint the town	On-going	\$500	Program in development -15 Youth	Not yet
Message in a bottle	On-going	\$500	Program in development - 15 Youth	Not yet
Bomb the bottle	On-going	\$500	Program in development - 15 Youth	Not yet

Last three months – stakeholder support provided (including specialist arts advice to Council and Council staff)

Note: CHART's MOU with WDC includes agreement to provide support to the following stakeholders: Old Library, Whangarei Art Museum, The Quarry Arts Centre, Reyburn House, The Papermill, Northland Youth Theatre, Hihiaua Cultural Centre, Whangarei Youth Music, Te Kowhai Print Trust, The Packard and Pioneer Museum, Whangarei Museum and Kiwi North, Channel North, and Creative Northland.

Organisation/group/individual supported	To do what?	Support provided by CHART
Hihiaua Cultural Centre	Project Build Planning/application – work directly with Board – 3 people	Administration/funding assistance
Whangarei Youth Music	Philanthropic event - work directly with Board – 4 people	Administration
Packard and Pioneer LTP	LTP Submission Support work directly with Co-ordinator	Administration/funding assistance/advice
Whangarei Museum Fundraising Support	Fundraising Support - work directly with Co-ordinator	Administration
Whangarei Art Museum	Matariki Installation/letters of support – CHART	Administration

Staff	Staff	
Reyburn House	Promotional Support work directly with Co-ordinator	Administration
Waipu Museum	Festival Support work directly with Co-ordinator	Administration
Te Kowhai Print Trust	Governance Support work directly with Co-ordinator and Board	Administration
The Quarry Arts Centre	Capital Project Assistance work directly with Manager	Administration
Northland Youth Theatre	Governance- work directly with Manager	Creative Northland Manager sits as CHAIR
The Paper Mill:	Philanthropic Planning- work directly with Manager	Administration
Old Library Community Centre	Fundraising Management (* see below) Management and administration from CHART x2 people	Administration
Channel North	App build and Promotions x1person	Administration
Whangarei District Council	Project Planning Matariki, Public Sculpture x2 people from CHART	Administration
Community Support:		
Nicola Muir	CNZ Funding Application Prep x1 person	Administration
Volunteer Whangarei	Volunteer Week- assistance with funding and stall x 2 people	CHART CEO sits as chair/ Administration.
Aaron Hoskins	Art Wall Installation x1 person set up/viewed by all visitors to CHART/sales generated	Administration
The Vault Exhibition	Lenny Muripaenga - 50-60 visitors/sales generated	Administration
The Butter Factory	Bookings	Administration
Daniel Matene	Creative Communities Application	Administration
Whangarei Music Society	Promotions	Administration
Whangarei Film Society	Promotions	Administration
The Shutter Room	Promotions	Administration
* OLD Library Management	Craft Markets every saturday- Public event 400 per event	Management and administration support
	Midday Music – 12 people per event weekly	Management and administration Support
	Book Launch – 30 people	Management and administration Support

	Fast Fibers Poetry Night – 20 -30	Management and administration Support
	Service Day Pompallier	Management and administration Support
Zumba		Management and administration Support
		Management and administration Support
Yoga		Management and administration Support
Pilates		Management and administration Support
CHART Board Workshop -15 people		Management and administration Support
	Love your water seminar -	Management and administration Support
	Matanui Community Show	Management and administration Support
	La Belle Alliance	Management and administration Support
Stage Challenge		Support
Old Library Fundraising	ASB Community Trust \$20, 000, WDC Community Fund, Lotteries, Oxford etc.	Administration/Application prep

Creative Northland	CA5 Kaitaia - 20 people	Event management
	Northland Youth Summit -125	Event management Administration
	Bitches Box Consortium Tour w/ Mel Parsons - 250 people	Event management
	Culture Segmentation for Audience Development - 10 people	Management
	(Regional Arts Development Manager Annual Leave)	
	Chamber of Commerce board Meeting	Staff member on Board
	Business awards sponsorship commission trophies and judges x5 peoples	management
	51 st Dates ticket Sponsorship	Support
	FIFA u20's x 1 staff member	Support
	Matariki Video Installation by Karen Sydney - production team/CHART staff/Art Museum staff/Artists being filmed x7	Sponsorship and Support

Last three months – summary

Total visitors/participants	Unquantifiable
Total number of events	18

Other funding sought	\$83,500 (ASB, COGS, Creative Com)
Other funding received	\$20,000 (Asb Old Library)
What has gone well?	Northland Youth Summit & Stakeholder philanthropic funding workshop.
What has not gone well?	The Poetry Walk Project is proceeding, but has not had much buy in this time round.
Anything else you would like us to know about?	Chart is an integral part of the Hihiāua Cultural Centre workforce, preparing documentation to support the capital project.

Next three months – activity details

Name of activity planned	Planned date/s of activity	Marketing approaches planned	Customer satisfaction collection planned
Sup App Launch	Sept	Full campaign, road show; launch event, posters, stickers, billboards, DI fliers, Web campaign. Stories on TV & Newspapers, radio sponsorship.	Testing period
Creative Communities Application Support	Aug	N/A	Feedback form
Northland Youth Summit Projects: Pepi Pride, Busted, Bomb the Boat, Paint The Town, message in a Bottle.	Aug/Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Manawahine Master Class Workshops	July	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Manawahine Production	July	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Matariki exhibition	July	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Whale Rider	Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Chamber of Commerce Board Meeting	July	N/A	N/A
Sup App Launch	Sept	Full campaign, road show; launch event, posters, stickers, billboards, DI fliers, Web campaign. Stories on TV & Newspapers, radio sponsorship.	Testing period
Audience Development Workshop Auckland	Sept	Invitation	Feedback form

FIFA Art Competition	Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Old Library:			
Children's Music Series	Sept	Posters, Facebook, radio sponsorship, newsletter, newspaper	Feedback form
Off The Cuff refurbishment	July	N/A	N/A
Front of House construction	Aug	N/A	N/A

Breakdown of events at Old Library

Name of activity	Date/s of activity	Description of event, activity including any highlights	# contributors/stakeholders (e.g. artists / speakers) etc)	# stakeholders/volunteers involved	# participants (children/ adults/ seniors etc)	\$ cost to participate (children/ adults/ seniors etc)
Craft Markets	24 th May, 7 th and 21 st June	Inside winter markets for Crafty people wares	40	2	200	0
Midday Music	Every Wednesday	Lunchtime Music Concert	2 – 12	2	5-35	Gold Coin
Book Launch	25 th May	Book Launch for Peri Hoskings.	1	1	30	0 with expectation to buy books
Fast Fibers Poetry Night	29 th May	Poetry Group with guest poets and readings	2	2	20 – 30	Gold Coin
Service Day Pompallier	6 th June	Clean up day at the Old Library	2	13	12	0
Zumba	Every Tuesday	Zumba Class	1	1	10 – 12	10 per person
Yoga	Every Tues – Thurs	Hatha Yoga classes for all ages, Fitness levels and abilities	2	2	40-50	5 per person
Pilates	Mon-wed-Fri	Pilates classes for all ages, Fitness levels and abilities	1	1	10 – 20	15 per person

CHART Board Workshop	10 th June	Private Meeting	10	10	10	0
Love your water seminar	11 th -12 th June	Public meeting on water quality	3	3	1	0
Matanui Community Show	12 th June	Theatrical show about the dangers of Suicide	4	4	18	0
La Belle Alliance	15 th June	Tri of performers, Vocal, Piano and Violin	3	5	42	25 per adult, 10 per child/student
Stage Challenge	20 th June	Green Room Use of Te Studio	3	60	60	N/A



Annual Operating Fund

Quarterly Community Event Reporting – CHART

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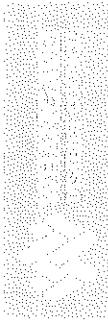
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Please add extra rows if needed.

Last three months – activity details

Name of activity	Date/s of activity	Cost of the activity	Marketing approaches used	Customer satisfaction data collected
Fundraising Stakeholder Workshop with NCT and TKPT	Aug 2014	\$300	E-mails and phone calls and personal visits. Held off-site for Variation and interest	Feedback received – clashed with Geoff Wilson Gallery opening
Chorus Mini Murals	Sept-Nov	\$16,000 funded 100% by Chorus	e-news, emails, posters, direct conversations with WDC marketing staff and The Leader and The Northern Advocate	No yet, but have had initial thanks for inviting people to submit
Craft Internships	May-Nov 2014	\$25,000 funding 100% by ASB	NA. Planning marketing campaign for exhibitions	Yes, once exhibition held. Photos required
SUP app Development	Ongoing	Annotx	Launch in development	Not yet



Poetry Walk	Part two "sculpted Steel' at manufacture process	\$6,500 supported by Creative communities	e-news, emails, posters, direct conversations with WDC staff and The Leader and The Northern Advocate	No
Creative Northland Touring Shows	Jul-Sept	\$50,000 funded by CNZ	e-news, emails, posters, Venues and Events, paid advertising, Fairfax and APN.	Yes. Audience feedback cards
Matariki – 7 sisters installation	Jul	\$7000 from ASB	e-news, emails, posters, website, venues and events	No – via WAM
Youth Summit Projects:				
Pepi Pride	Ongoing-Nov Nov	\$500	. Large editorial content in local newspapers. Facebook e-news.	Not yet
Busted	On-hold	\$500	??	No
Paint da Town	On-going	\$500	Some murals at various schools	No
Message in a Bottle	On-going	\$500	Waiting on funding	no
Old Library				
Crafty People Markets	21 st June/5 th & 19 th July/ 2 nd August 1 st , 8 th and 15 th	0	Roadsigns, Newspaper and Social Media	YES
Gaza Vigil	August	Gold Coin Donation	Social Media and Word of Mouth	NO
Fast fibres Poetry Group	26 th June/ 2 ^{1st} August/ 25 th Sept 12 th July	Gold Coin Donation Free	Social Media, Take Flight and Word of Mouth Social Media, District Health Boards, Flyers and Posters	NO No
Matanui Community Show	28 th June	\$30	Social Media, School Handouts and Established Clientele	No
Zoe Booty Singing Workshop	19 th July	\$35	Newspaper, Social Media and Word of Mouth	NO
Te Puu Ao Fundraiser – Betty Anne and Friends	19 th July		Newspaper and Established growers	NO
Whangarei Orchid Society Expo	22 nd -24 th August	Gold Coin Donation		
#LOUD Sounds	5 th September	\$5	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO
Storylines Family Day	29 th -30 th August	Free	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO
Mairtown Kindergarten Meeting	6 th September	Free	Private Meeting	NO



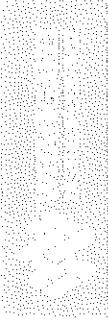
Faust Quartet	14 th September	\$30	Newspaper, Newsletter, Social Media and Word of Mouth.	NO
Kamo High School Exhibition	28 th July – 8 th August	Free	School Newsletter and Word of mouth	NO
#LOUD Live	19 th September	\$5	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO

Last three months – stakeholder support provided (including specialist arts advice to Council and Council staff)

Note: CHART's MOU with WDC includes agreement to provide support to the following stakeholders: Old Library, Whangarei Art Museum, The Quarry Arts Centre, Reyburn House, The Papermill, Northland Youth Theatre, Hihiaua Cultural Centre, Whangarei Youth Music, Te Kowhai Print Trust, The Packard and Pioneer Museum, Whangarei Museum and Kiwi North, Channel North, and Creative Northland.

Organisation/group/individual supported	To do what?	Support provided by CHART
WDC	Working with WDC staff, Poetry Walk, Sculpture Symposium,	Discussions and providing public art for Whg District.
Venues and Events	Paid for Touring Shows, promotion of activities	Working on Northland Art Guide for Public art in Whangarei
Whangarei Libraries	Support for Storylines	Filled the theatre and earned revenue for Venues and Events through the CNZ touring shows.
Te Kowhai Print Trust	Funding and general support, promotion of activities	Old Library, venue and other staff support
Volunteer Whangarei	Support	Funding and General Support, promotion of activities
Old Library	Organisation support	Trustee support
Whangarei Art Museum		Closely working with Directors and Old Library Stakeholder in collating a historical dossier, and preparing two workshops with OL Manager.
Pioneer and Packard		Extensive building maintenance work being carried out.
Sistema		Building of an office to house service staff and meet health and safety requirements as building is very cold in winter.
Whangarei Youth Music		CHART contracted Fundraising Manager working alongside organization
Quarry Arts And Te Kowhai Print Trust		

		Auckland
Waipu Museum	Art and Tartan	Working with Waipu in building the submissions for Art and Tartan awards.
Hihiua	Funding	Engaging with ASB in assisting with funding, and funding assistance for the Pacifica festival
Whangarei Youth Space	PepiPride / Artbeat	Working with WYS in handover of PepiPride, looking to be annual event. Coordinating with WYS in Scheduling Youth Stage at Artbeat.
NSA / Reyburn House	Civic Awards and funding	Accompanied NSA to Civic Awards, providing assistance with ASB funding.
Channel North	SUP app and Youth Summit	Close liaison with App development, connection with new camera staff accompanied to Kaitahe for Youth Summit festival event.
Collaborationz	Funding	Funding support.
Northland Youth Theatre	Governance	Various support
7 seven of the stakeholder orgs have engaged in the Creative Giving Project	CHART contracted Fundraising Manager working alongside organization to assist with fundraising initiatives e.g developing donor collateral/systems and processes. All progressing well.	CHART contracted Fundraising Manager now into the second part of the project now being funded solely by CHART. Further funding being sought to complete project. Progressing development of a Philanthropic Trust for Northland Arts
Last three months – summary		
Total visitors/participants	2000	
Total number of events	100+	
Other funding sought	ASB Community Trust, CNZ, Oxford Sports Trust, Pub Charities, Lotteries, Creative Communities, Dept Internal Affairs – COGS, and Sponsorship: Chorus, Craigs Investment Partners, ANZ Bank, Resenes, LJ Hooker (Funding and Sponsorship – ongoing)	
Other funding received	ASB Community Trust, CNZ, Oxford Sports Trust, Pub Charities, Lotteries, Creative Communities, Dept Internal Affairs – COGS	
What has gone well?	Connecting with Stakeholders through various approaches; Governance support (CHART staff sitting on various Stakeholders Boards) Funding and Projects coordinator, and Philanthropic Contractor working closely with stakeholders.	
What has not gone well?	<ul style="list-style-type: none"> Needed to document via photography the Glass internship program, (Intern has made a dossier of program) will do for Clay artist. Will document the exhibitions. Stakeholder meeting clashed with an important Exhibition opening, Some Youth Summit projects have slowed due to many youth commitments, study, exams, applying for uni etc. “Sculpted Steel” hold up due to quality of poem submissions, impacted on applying for Creative Communities funding as deadline has stretched beyond finishing date. 	



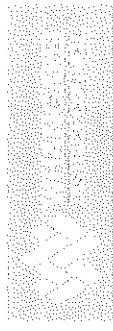
- **Limited funding avenues for Events:** Artbeat, Waitangi Hangi, Sculpture Symposium etc, CHART is the umbrella for many events, only being able to apply once or twice a year for the likes of Pub Charities. Also being excluded from applying for the WDC Community Fund, for what are essentially community projects that benefit the district. Many small committees do not have the required legal status to apply to the relevant funding bodies.
- No extension of funding for the Fundraising Manager position from ASB so will be carried by CHART until further funding is successful as project is showing success with stakeholder engagement very high.

Anything else you would like us to know about?

- See above for limited funding opportunities / Creative Communities deadlines

Next three months – activity details

Name of activity planned	Planned date/s of activity	Marketing approaches planned	Customer satisfaction collection planned
Artbeat 2015 development planning underway	Feb 14, 2015	TBA	yes
Sculpture Symposium 2016 development planning underway	Feb 2016	TBA	yes
Arts Awards 2015 – planning development underway	April 2015	TBA	yes
Chorus Mini Murals will be completed	22 Nov 2014	Posters, Newspaper, Social Media and Word of Mouth	yes
Malcolm Rand Philanthropic workshop in conjunction with NorthTec	23 Oct 2014	By invitation only	yes
CHART AGM and Audit	11 Nov 2014	All welcome, newspaper, e-news, facebook	no
Youth Summit events	Ongoing	Newspaper, e-news facebook	yes
Audience Development	On-going – end Feb 2015	Survey Monkey and commissioning the Audience Connection via CNZ, working with Venues and Events. E-news	yes
Old Library:			
Pecha Kucha	24 th September	Posters, Newspaper, Social Media and Word of Mouth	Unknown
Sons of Zion	26 th September	Newspaper, Social Media, Posters, Flyers and Word of Mouth	Unknown
Hospice Charity Art Auction	1 st – 9 th October	Newspaper, Social Media, Posters, Flyers	Unknown



			and Word of Mouth	
Midday Music Fundraiser	4 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	Yes	
#LOUD Sounds	10 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
Whangarei Country Music Club Troubles Concert	11 th October 15 th October	Word of Mouth. Invitation for members only Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES Yes	
Advocate Wedding Expo	16 th – 19 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
Documentary Evening – Mental Health	22 nd and 29 th October/5 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
#LOUD Live	24 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
21 st – Private Function	25 th October	PRIVATE	NO	
Fast Fibres Poetry Group	30 th October/ 20 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
Cake Decorating Guild	7 th – 9 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
Craft and Art Northland	12 th 15 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
21 st – Private Function	22 nd November	Private	NO	
Advocate Fashion Show	26 th – 28 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES	
Jamie Garrick – Concert	29 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO	
Te Pu Ao Fundraiser – Arrijah	6 th December	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO	
21 st – Private Function	13 th December	Private	NO	



Annual Operating Fund

Quarterly Community Event Reporting – CHART

Quarterly reporting – required by the 20th of:

- September (for 20 Jun to 19 Sep),
- December (for 20 Sep to 19 Dec),
- March (for 20 Dec to 19 Mar) and
- June (for 20 Mar to 19 Jun).

or as otherwise agreed with Community Services.

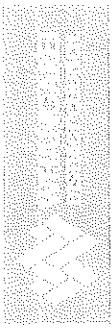
Please return the completed form to carlai@wdc.govt.nz and bree.kurtovich@wdc.govt.nz.

Events to be reported on include any art, culture or heritage activities directly or indirectly supported by the Annual Operating Fund. These can include, but are not limited to: exhibitions, events, shows, initiatives, workshops, seminars, lectures, open days and classes.

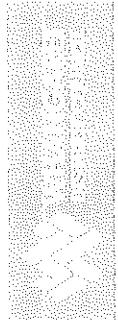
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Last three months – activity details

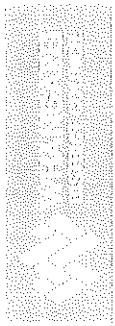
Name of activity	Date/s of activity	Cost of the activity	Marketing approaches used	Customer satisfaction data collected
Chorus Mini Murals	Sept- Dec	\$16,000 funded 100% by Chorus	e-news, emails, posters, direct conversations with WDC marketing staff and The Leader and The Northern Advocate, Takeflight, Facebook	No, will once project complete. Many positive comments on Facebook
Craft Internships	May-Nov 2014	\$25,000 funding 100% by ASB	NA. Planning marketing campaign for exhibitions	Yes, once exhibition held. Photos required
SUP app Development	Ongoing	Approx. 12,000	Launch in development	Not yet
Poetry Walk	[REDACTED]	\$5,500 supported by [REDACTED]	e-news, emails, posters, direct conversations with WDC staff and The Leader and The Northern Advocate	No



	manufacture process	Creative communities	
Northland Business Awards and Sponsors and Winners Evening	Oct 27 th Dec10th	\$2150	Through our connections with Chamber of Commerce and the Advocate. We contracted local artist Kawhiti Wiremu to make the trophies
Creative Networking trip to NZ Sculpture on Shore in Devonport Auckland. CHART organized a trip on a 40 seater bus.	11 Nov	\$500 CHART sponsorship to reduce travel costs	Email invites and facebook, WAM sent their Volunteers as a thank you to them. Advocate reporter Lindy Liard also joined us on the bus trip.
CHART (Rosie Riggir) Scheduled full Music program for Whangarei Art Museum – Black Rainbow and He Korero	Oct – 7 December	Na	Through WAM, newspaper, social media and posters and flyers. Printed programs.
Malcolm Rand Workshop in partnership with Northtec, Northland Community Foundation and CHART Creative Giving Program Comic Trade support	23 rd Nov	Free	Targeted email and postal invitations. Social media through Transition towns
Nominations for Whangarei Youth Awards. Many of the youth we connect with were nominated and to the Youth Awards. Finalists were through activity and connections through the Northland Youth Summit Monthly columns in the Advocate	Oct-Nov	Free	Social media support and connections with graffiti artist Rodrigo to bolster activity for Comic Trade
E-news and Poster Distribution	Oct – Dec Ongoing project	Free	Through WDC YAG
Attendance at the Regional Arts Leaders conference in Waiauapa also attended by CNZ CEO	6-7 Nov	\$800-\$1000 2 pax travel and accom	WDC YAG
Philanthropic activities – refer to stakeholder engagement	Ongoing	Free	Advocate distribution
Planning Northland Youth Summit 2015. Cross - collaboration with many	Ongoing	Free	Continuing to update NYS projects on Social Media



agencies: Channel North, Media Works, Northland Intersectoral Forum, Child and Family friendly cities, MSD, MYD, NHHT, NDH, Manaiā PHO, even support from Auckland City Council, HYPE and NIF			
Youth Summit Projects:			
Pepi Pride	Ongoing-Nov Distribution day 8 Nov	\$500	Large editorial content in local newspapers. Facebook e-news.
Busted	On-hold	\$500	??
Paint Tha Town	Murals completed, waiting on installation Jan 2015	\$500	Picked up Murals, were presented at the Youth Awards Pre-event. On-going Facebook activity, Unveiling will be a media event
Message in a Bottle	On-going, Great support at Library for sculpture. Possible installation Feb 2015 in WDC sculpture Garden	\$1500 (\$1000 awesome foundation funding)	Newspaper articles. Facebook.
Feed The Whanau	Support of an underprivileged family in Whangarei	\$300	Facebook and looking at following up with local Media
Old Library			
Crafty People Markets	21 st June/5 th & 19 th July/ 2 nd August 1 st , 8 th and 15 th August	0	Roadsigns, Newspaper and Social Media
Gaza Vigil		Gold Coin Donation	Social Media and Word of Mouth
Fast fibres Poetry Group	26 th June/ 21 st August/ 25 th Sept	Gold Coin Donation	Social Media, Take Flight and Word of Mouth
			Project plan to be finalized.
			Project plan to be finalized.
			YES
			NO
			NO

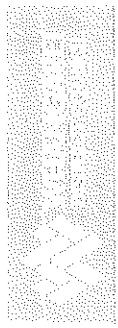


Matanui Community Show	12 th July	Free	Social Media, District Health Boards, Flyers and Posters	No
Zoe Booty Singing Workshop	28 th June	\$30	Social Media, School Handouts and Established Clientele	No
Te Puu Ao Fundraiser – Betty Anne and Friends	19 th July	\$35	Newspaper, Social Media and Word of Mouth	NO
Whangarei Orchid Society Expo	22 nd -24 th August	Gold Coin Donation	Newspaper and Established growers	NO
#LOUD Sounds	5 th September	\$5	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO
Storylines Family Day	29 th -30 th August	Free	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO
Mairtown Kindergarten Meeting	6 th September	Free	Private Meeting	NO
Faust Quartet	14 th September	\$30	Newspaper, Newsletter, Social Media and Word of Mouth.	NO
Kamo High School Exhibition	28 th July – 8 th August	Free	School Newsletter and Word of mouth	NO
#LOUD Live	19 th September	\$5	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO

Last three months – stakeholder support provided (including specialist arts advice to Council and Council staff)

Note: CHART's MOU with WDC includes agreement to provide support to the following stakeholders: Old Library, Whangarei Art Museum, The Quarry Arts Centre, Reyburn House, The Papermill, Northland Youth Theatre, Hihiaua Cultural Centre, Whangarei Youth Music, Te Kowhai Print Trust, The Packard and Pioneer Museum, Whangarei Museum and Kiwi North, Channe North, and Creative Northland.

Organisation/group/individual supported	To do what?	Support provided by CHART
WDC	Working with WDC staff, Poetry Walk, Sculpture Symposium,	Discussions and providing public art for Whg District.
Venues and Events	Paid for Touring Shows, promotion of activities	Working on Northland Art Guide for Public art in Whangarei
Te Kowhai Print Trust	Specifically supporting the Print Scholarship program and other funding and governance support	Filled the theatre and earned revenue for Venues and Events through the CNZ touring shows.
Volunteer Whangarei	Support	Funding and general Support, promotion of activities
Old Library	Organisational support	Trustee support
		Closely working with Directors and Old Library Stakeholders.
		Extensive building maintenance work being carried out.



		Build of an office to house service staff completed.
Whangarei Art Museum	Scheduling 'He Korero' 2 day musical event, promotion of activities.	CHART contracted Fundraising Manager working alongside organization, Rosie Scheduled Music program for He Korero and general promotion of Arts Activities
Pioneer and Packard	Philanthropic/Creative Giving project	Setting up fundraising support
Sistema	Philanthropic/Creative Giving project	Setting up fundraising support
Quarry Arts	Philanthropic/Creative Giving project	Setting up fundraising support, and general promotion of arts activities
The Paper Mill	Attended 2 workshops	Support offered, attended 30 th Anniversary (Birthday celebrations) No further assistance required.
Waipu Museum	Presented Philanthropic/Creative Giving fundraising to the Waipu board	Working with Waipu in building the submissions for Art and Tartan awards.
Hihiaua	Funding	Assisting in Funding applications to ASB and Oxford Sport Trust.
Whangarei Youth Space	PepiPride / Artbeat / Youth Activities	Working with WYS in handover of PepiPride, looking to be annual event. Coordinating with WYS in Scheduling Youth Stage at Artbeat.
NSA / Reyburn House	Poster distribution	NSA (Elizabeth) unwilling to engage with CHART over the last 3 months, CHART Creative Giving Manager has approached them several times.
Channel North	SUP app and Youth Summit	Close liaison with App development. Channel North on the Steering party for Northland Youth Summit.
Collaborationz	Funding	Funding support.
Northland Youth Theatre	Governance	Various support and promotion of activities.
Last three months – summary		
Total visitors/participants	2000	
Total number of events	20	
Other funding sought	Oxford Sports Trust, Lotteries DIA, and Sponsorship: Chorus, Craigs Investment Partners, Resenes, Wynn Fraser Paints, Bunnings, Speedy Signs, LJ Hoaker, Soundcave	
Other funding received	Sponsorship confirmed: Chorus/Craigs Inv Partners/Resenes/Wynn Fraser Paints/ Bunnings/ Speedy Signs/ Fast Signs/LJ Hoaker/Soundcave	
What has gone well?	Connecting with Stakeholders through various approaches; Governance support (CHART staff sitting on various Stakeholders Boards) Funding and Projects coordinator, and Philanthropic Contractor working closely with stakeholders. WDC Youth Awards had many finalists from the Northland Youth Summit activity. CHART is connecting and collaborating with the district's youth.	



Collaboration and connections from other Agencies such as *Channel North, Media Works, Northland Intersectoral Forum, Child and Family friendly cities, MSD, MYD, NHHT, NDH, Manaia PHO*, even support from Auckland City Council, HYPE and NIF, this has stemmed from the Northland Youth Summit.

What has not gone well?

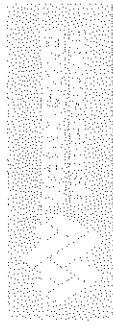
- “Sculpted Steel” hold up due to varying reasons.
- **Limited funding avenues for Events:** Artbeat, Waitangi Hangi, Sculpture Symposium etc, CHART is the umbrella for many events, only being able to apply once or twice a year for the likes of Pub Charities. Also being excluded from applying for the WDC Community Fund, for what are essentially community projects that benefit the district. Many small committees do not have the required legal status to apply to the relevant funding bodies.
- **Old Library Repairs and Maintenance:** Lift requires replacing, and the major leak in the building. Thanks to WDC for their support. H&S for leaking toilets.

Anything else you would like us to know about?

- Great support from WDC in regards to visible Murals –Paint Tha Town (Thanks Mike Hibbert), and support from Gay Kerr in the Old Library Building repairs and Maintenance.
- CHART is undergoing an internal review, and the CHART board is looking how to efficiently and effectively provide Whangarei with the best service delivery they can. The CHART board are working diligently over the next month January in this review. Any questions contact CHART Co-Chair Katy Brown.
- Chris Carey CEO contract has expired. Laura Burns is the acting Office Manager.

Next three months – activity details

Name of activity planned	Planned date/s of activity	Marketing approaches planned	Customer satisfaction collection planned
Artbeat 2015 development planning underway	Feb 14, 2015	TBA	yes
Sculpture Symposium 2016 development planning underway	Feb 2016	Craigs Investment Partners are interested Sponsorship partners.	yes
Youth Summit events/wash up	Ongoing	Newspaper, e-news facebook	yes
Youth Summit 2015 Planning	Ongoing	Various	Yes
Audience Development and Social Media Workshops	Ongoing – end Feb 2015	Survey Monkey and commissioning the Audience Connection via CNZ, planning CCS workshop and 2 social media workshops in Jan 2015	yes
Old Library:			



Pecha Kucha	24 th September	Posters, Newspaper, Social Media and Word of Mouth	Unknown
Sons of Zion	26 th Spetember	Newspaper, Social Media, Posters, Flyers and Word of Mouth	Unknown
Hospice Charity Art Auction	1 st – 9 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	Unknown
Midday Music Fundraiser	4 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	Yes
#LOUD Sounds	10 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
Whangarei Country Music Club	11 th October	Word of Mouth. Invitation for members only	YES
Troubles Concert	15 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	Yes
Advocate Wedding Expo	16 th – 19 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
Documentary Evening – Mental Health	22 nd and 29 th October/5 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
#LOUD Live	24 th October	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
21 st – Private Function	25 th October	PRIVATE	NO
Fast Fibres Poetry Group	30 th October/ 20 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
Cake Decorating Guild	7 th – 9 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
Craft and Art Northland	12 th – 15 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
21 st – Private Function	22 nd November	Private	NO
Advocate Fashion Show	26 th – 28 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	YES
Jamie Garrick – Concert	29 th November	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO
Te Pu Ao Fundraiser – Ardijah	6 th December	Newspaper, Social Media, Posters, Flyers and Word of Mouth	NO
21 st – Private Function	13 th December	Private	NO

Packard & Pioneer: Development Project Tracking Sheet

2015-02-03

Rationale: Packard & Pioneer are facing funding shortages due to a changing economic environment. The charitable trust has decided to diversifying their current funding streams to include donations and sponsorship (*creating a culture of creative giving and philanthropy*) to ensure long term sustainability.

Action	Planning/progress	Responsibility	Time line	Notes
Decide on Fund Options	50% progress Examples given to Fran and Richard	Fran and Richard to develop Fran to write up emotive 'Call to action'	First draft completed ?	Descriptions and call to action for each fund two/three lines
Funding (assisted by Rosie Riggir)				
Explore funding and grant applications open to Museum and heritage/education.	100% progress Application in and aiming for one every month	Fran and Richard		Search Fundview, also explore Gaurdian Trust/Public Trust and international options.

Project Tracking

Create an annual Funding application, process and accountability time line using excel	100% progress Funds Tracking Chart	Richard to construct	
Soft Copy Collateral			
Create E- newsletter Mailchimp	50%progress	Richard (oversee by Fran)	
Hard Copy Collateral			
Develop Donation insert	20% progress Back and front hard card	Fran and Richard Examples given, 1st Draft from Richard, finalised draft 12 August at Skype meeting	September 2014 ##Website must reflect this information
Events			
VIP recognition event for donors/supporters Re-engagement	0% progress	Richard/Board	Finalised September 1 st Event date November
Invitation and personalised letter	0% progress	Wording/copy Fran	

Event invitation 10cmx21cm back and front (colour) Copy for letter			
Segmentation			
Database and donor analysis Explore and segment database	50% progress	Richard and Fran	Originally September 2014
Other Actions			
Create Annual Development Plan (include fundraising and Grant actions)	0% progress	Richard and Fran with assistance from Bernadette	
Present Development Plan to Board and their involvement	0% progress	2015 Board meeting	

Quarry Arts Centre: Project tracking sheet

February, 2015

Project Plan: Re engage previous donors and establish new donor relationships

Tuesday, 3

Actions		Hard/Soft Copy Collatoral		
Project	Planning/progress	Responsibility	Time line	Notes
Website redesign and launch	<ul style="list-style-type: none"> • Ensure donation tab and Quarry fires option on site (DONE) • Donor recognition page/Grants and trusts (DONE) • Call to action option on front page(DONE) <p>'\$60K to demolish and reconstruct the old Quarry Dungeon.'</p> <p><i>"honor the past as we move forward"</i></p>	<ul style="list-style-type: none"> 70% progress 	February 2015 Brand and look (Give a little)- do you have the opportunity to capture donor information to engage and cultivate?	Currently underway with Big Fish design Awareness regarding Campaign



CULTURE HERITAGE ARTS RESOURCE TRUST

Project	Planning/progress	Responsibility	Time line	Notes
Hardcopy/e- newsletter to go out (re-engagement mailing)	80% progress		December 2014	<p>Include Quarry fires letter to 120 membership base</p> <p>Brochure/letter to non members re Quarry fires/Link to page website if ready?</p> <p>Send as many as possible to 2000+ database</p> <p>Mention the website launch-build excitement</p> <p>Talk about the 'event' to signify the launch- Ability to buy a brick</p>
Create donation brochure/flyer/collateral	70% progress		Feb/March 2015	<p>1st Draft completed DLE</p> <p>Insert with February /March 15 ...Acquisition newsletter</p>



Events				
Project	Planning/progress	Responsibility	Time line	Notes
Create event re demolition and rebuild?	20% progress		Feb/March 2015 Invitation VIP Public invitation Media Evening event/sunset Art news FB Build up	Tell the story Buy a brick \$20? Support the new build Honor those who were part of the journey
Other Actions				
Project	Planning/progress	Responsibility	Time line	Notes
Create an understanding about the Culture of Fundraising with board	??% progress Presentation- The cycle of the cultivation process		Presentation January 2015	
		<ul style="list-style-type: none"> • Major Donors; how they get there? Time frames, legacy • Donor databases • Campaigns- lead campaign 		
Explore Corporate partnerships/	??% progress			



CULTURE HERITAGE ARTS RESOURCE TRUST

sponsorship possibilities		

Reyburn House: Project tracking Sheet

Tuesday, 3 February, 2015

Project: CHART North is undertaking a project to establish a culture of fundraising and philanthropy within the Arts Culture and Heritage sector of Whangarei and Northland.

Fundraising will be a new activity to Reyburn House and as such the initial priority is to build up a database of individuals and businesses that may donate or sponsor the organisation's activities.

Key actions: Brochure and e -newsletter development, understanding of donations and stewardship of donors, strategy around sponsorship.

Project Plan:

Project	Planning/progress	Responsibility	Time line	Notes
1. Create understanding about the Culture of Fundraising with board members and committee	0% progress Presentation to board	Elizabeth/Bernadette Murphy	Organise date of presentation to committee 6hrs per month <ul style="list-style-type: none"> • Fundraising Portfolio • Funding portfolio • Marketing and Communications Portfolio 	Portfolios recommended
2. Create donor insert for current brochure IMMEDIATELY- need now <ul style="list-style-type: none"> • Also begin work on new general brochure 	0% progress	Elizabeth with Bernadette support		Overseen by Bernadette Murphy



CULTURE HERITAGE ARTS RESOURCE TRUST

3. Liaise with Campbell Abbott (Abbott Design) to create <ul style="list-style-type: none"> hard copy and e-newsletter with a donor cultivation focus (soft ask, bank acct) Ensure website and Facebook reflect these initiatives 	0% progress	Bernadette and Elizabeth Committee Portfolio member	
4. Create and send first e/newsletter November 2014	0% progress	Bernadette and Elizabeth Website person	Mail chimp and face book integration- Michelle's 18th December workshop
5. Identify potential donors- corporate and individual for Reyburn House <ul style="list-style-type: none"> Research and segment all captured data Create systems to capture new data (visitors, potential donors etc) Explore Corporate partnerships/ sponsorship possibilities for Reyburn House 	0% progress	Bernadette Murphy/Funding person CHART VOLUNTEERS! All members	Research will be key to identifying and profiling these individuals and businesses that may support Reyburn Develop lists and potential meetings/projects Resene!
6. Begin cultivation of potential donors	0% progress	Bernadette Murphy Elizabeth Committee Portfolio	
7. Special events development	0% progress	Bernadette Murphy/Volunteer	Beginning cultivation cycle.



CULTURE HERITAGE ARTS RESOURCE TRUST			
		Sponsored by?	
8.	<ul style="list-style-type: none">• Oversee Government and Council grants and relationships• Oversee Major funding i.e. Trusts, Foundations relationship	0% progress	Bernadette Murphy/CHART to provide support regarding processes and relationships
9.	Develop first draft of the Reyburn House fundraising and development plan- annual and long term vision	0% progress	Bernadette Murphy to provide support regarding processes and relationships

Kiwi North: Development Project Tracking Sheet

2015-02-03

Rationale: Kiwi North Charitable Trust are diversifying their current funding streams to include donations and sponsorship (*creating a culture of creative giving and philanthropy*) to ensure long term sustainability.

Action	Planning/progress	Responsibility	Time line	Notes
Decide on Fund Options	25% progress	Allie Fry Linda Ace	December 19th	Need Descriptions and call to action for each fund two/three lines Allie- are you able to put wording around these funds?

Hard Copy Collateral				
Action	Planning/progress	Responsibility	Time line	Notes
Develop Donation Brochure DLE three fold Back and front	10% progress	Allie Fry Linda Ace	Printed Dec 12	Allie - unwell and then both Linda and Allie at conference- date will now change
Soft Copy Collateral				
Action	Planning/progress	Responsibility	Time line	Notes
Website Update supporter page Ability to donate online Click through ability from key words to other pages	0% progress	Allie Fry Linda Ace	2015	Online design Attend CHART workshop on 18 December- will give tools on how to create donate online options and mailchimp for e-newsletters
Events				
VIP recognition event for donors/supporters Re-engagement <i>Event Brief template attached</i>	0% progress	Launch of new build, thank you and special letter invitation. How many donors in last 5 years? Allie Fry Linda Ace Stewart Bowden	Event date ? 2015	Note: Martin Family Musicians for Recognition event Announce Stage two of Capital Build at recognition event-architect to speak/present

Event Invitation and personalised letter	0% progress	Allie Fry Linda Ace	Copy ready by ?
10cmx21cm back and front (colour)			Sent by ?
Copy for letter			
Segmentation			
Friends of Kiwi North Data Analysis	0% progress	Allie Fry Linda Ace	??
Explore and segment: Volunteer/supporters/subscribers database	0% progress	Allie Fry/Linda Ace	2015
Other Actions			
Create Annual Fundraising Plan (or Development Plan: inclusive of Grant applications)	0% progress	Allie Fry Linda Ace Stewart Bowden	February 2015
Present Fundraising Plan to Board and their roles	0% progress	Stewart Bowden	March 2015

Donor brochure ready for the sing along: 19 Dec

Email through friends database

Sistema/WYM: Development Project Tracking Sheet

2015-02-03

Rationale: Sistema Whangarei sits under the umbrella of WYM, however it has different needs and is working as a separate fundraising entity. Fundraising and Development is a new strategy for Sistema and one that is necessary as they expand and grow the volunteer base to being paid staff.

Action	Planning/progress	Responsibility	Actions	Time line	Notes
Decide on Fund Options	0% progress	Fiona	<ul style="list-style-type: none"> Draft three projects that have a 'Call to action' Possible options discussed: <p>Sistema Holiday programme Sistema Afterschool programme Performance Fund</p>	2015	<p>Need Descriptions and call to action for each fund two/three lines</p> <p>Fiona- I realise you currently have "Instruments" as giving levels on your Donor insert- do you want to continue with this?</p>
Develop processes and procedures as policy for donations, grants and trusts and sponsorships	0% progress			September 2014 ?	Example- five day turn around for thank you letter, Annual receipts

Action	Planning/progress	Responsibility	Time line	Notes
Create a Calender time line for the year: Information from January-December (<i>Monthly overview of actions, responsibilities, and communications across the year</i>)	100% achieved! Fabulous outcome and looks wonderful	Michelle and Fiona	Done	
	<ul style="list-style-type: none"> • Funding applications • Performance schedules (3-4 annually) • Holiday programme dates • External communications-e-newsletter to donors (in between holiday programmes), 	Mail Chimp (4 x annually Email and Hard copy) On website		Website looks great Fiona-©
Website ready	100% progress		September 2014	
	Update supporter page Ability to donate online Click through ability from key words to other pages			

Facebook			Put aside 1/2 hr daily to upload photos- this creates a strong follower base
Update Photos on the children daily			
Update concert photos			Slight tweaks but looking good.
Develop Donation Brochure	80% progress		
Community event for donors/supporters and Sistema families	0% progress	Finalised October 1 st Event date November/December	Showcase event of musicians, lead by Emma Paki (?) or maybe explore Whirimako Black or Whangarei based musician?
Invitation and personalised letter	0% progress	Copy ready 1 October Sent October 14th	
Event invitation			
10cmx21cm back and front (colour)			
Copy for letter			

E-newsletter Regina story Mail chimp segmentation
Give a little