

**BUSINESS  
WHANGAPARAOA**

**GENERAL  
OPERATIONS MANUAL**

# Business Whangaparaoa Standard Operating Procedures

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# Grant Funding Applications and Accountability Reporting

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## Applying for a Grant

As Business Whangaparaoa is not a BID (and this is a job done by BID Managers also) we rely very much on grants for our funding. The Business Manager is responsible for some of these grant applications and subsequent accountability reporting.

We are also very lucky to have Gwenda on the team who also submits various funding applications for us, however, the Manager is responsible for the accountability reporting. We are also lucky as Donna has also now set up our funding tracking system very well which makes the accountability reporting a much quicker and smoother process!

Make a note (and you should also get notice from the Local Board) when funding applications are open for submissions. BW will hopefully be eligible for Economic Funding each year with applications usually open about April and can also apply once a year for a community grant towards a specific project for the year.

To place an application log into the Australian Smarty Grants website at <https://aucklandcouncil.smartygrants.com.au/> -

- Login at the thin blue bar at the top. Login details are -
  - info@businesswhangaparaoa.co.nz
  - PW: BizWhanga12!
- Go to My Submissions
- You can check out what rounds are currently open (or coming up) at the link to the right of the blue bar
- Go to the grant round you wish to apply for
- Download the preview form
- Complete this manually and check you have all the necessary paperwork (eg bank account No evidence, letters of support, permits, minutes with resolutions, annual accounts, etc) - a list is provided
- You can then log back in and go to "Fill Out Now"
- Don't worry if you've missed something or are waiting on something as you can save and go back to complete later

If you are successful you will be notified by the Local Board or Auckland Council. You will then need to get the Chair to sign, date and need to return the acknowledgement form.

As you use the grant money for your project make sure you are tracking the spend in Xero. Note grant funds and reporting must always be GST exclusive.

## Accountability Reporting

When reporting you can get and download your accountability report from under the application information under your submissions.

Go to Xero and also get a report on the Tracking category (the Treasurer may do this for you)

You will need copies of all the invoices to submit with the accountability report so the easiest way to do this is to -

- Go to the Tracking Summary in Xero
- Click on each transaction
- Download the invoice it relates to and check the amount specifically towards that grant

- When saving your download add the claimed amount (ex GST) in your download file title just for ease of checking before submission
- Save these in their own folder so you don't get muddled with any other paperwork
- Also save a copy of the General Ledger Tracking Summary as you need to submit this also as evidence of the actual payment of the invoices
- You should then cross check your downloaded invoices and amounts against the Tracking Summary to make sure this is correct

You can then log back into the website and go to the Accountability Report and complete the form and submit. Make sure you submit this before the deadline.

## Monthly Meeting Management SOP

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### Set up Agenda and Reports

**Time Allowance: 1-2 hours -**

**Set up will take approx 1 - 2 hours depending on how much you need to report (eg if you are adding a few event reports this may take a little longer)**

**After 1st of each month** set up your agenda and reports to send out for the meeting. Try and do this min 7 days before the meeting if possible to give time to read.

If you have set up templates for the year -

- Go to your folder for the month
- Open your "Agenda and Reports for Meeting" template
- Ensure all the dates in the template are correct for the meeting/next meeting/minutes of previous meeting
- Add in any "Other Matters" to be discussed
- Open your minutes from the previous meeting and copy and paste after the agenda items
- Copy the list of financial reports you need from the Treasurer and email them with the list to send to you
- Complete your monthly Manager report including adding copies of any event reports and images you are reporting on for the month
- Complete the Membership Report numbers. To do this -
  - Open BW WPEngine
  - Go to FluentCRM | Contacts
  - Filter by list | Members
  - Tick boxes for custom fields to be downloaded of Business and Advertising End Date
  - Export (top right)
  - Then open your excel spreadsheet
  - First scroll through and remove any extras (eg your support email, local board rep, and also remove end date for any non-profits if they have one listed)
  - Then first sort by "Business" and remove any duplicates
  - Then sort by "Advertising End Date"
  - You'll then be able to see -
    - how many paying members you have
    - how many free not for profit members
    - who is currently due for renewal
    - who is coming up next month for renewal

- To get how many outstanding log into Xero | Invoices | Awaiting Payment - you can sort by amount and check how many are membership invoices due
- Complete your Membership Report
- Check everything is complete and SAVE
- Send to Executive Members with next meeting details and advice Treasurer's Reports will follow if not attached - Remember to send paperwork and meeting details to others invited to the Exec meetings, eg Local Board rep, FW rep and anyone else you may have coming along
- If you don't have the Treasurer reports when you first send the agenda just forward the Treasurer report email when you get them
- Then take image shots of the reports and -
  - add them into the agenda you've sent (don't resend to everyone)
  - Then you can upload this to the BW Google Drive folder
  - If you wish you can also add these into your Minutes template for the meeting so they are ready for when you do your Minutes and reporting

Then go and check you have the meeting booked in at the venue and confirm with them

## Meeting Day

The Chair will run the meeting. Provide any paperwork you may have agreed to provide.

Check before going to the meeting you have all apologies or anything else required.

## After the Meeting

**Time allowance: 1 hour or so**

After the meeting use your template (if you have one) and type up the Minutes then -

- Send to Treasurer first to sign off the Treasurers Report
- Get the Treasurer to then send on to the Chair
- Chair to then sign and upload a signed copy to the relevant Google Drive folder
- Chair to advise BM upload is complete
- BM to then send a copy of the minutes to all Exec members and others who attended with a reminder to check the Actions list and take any actions assigned to them before the next meeting if possible.

## New or Role Change Executive Committee Member SOP

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When you wish to nominate a new member to the Executive Committee or if you wish to change a current members role use the [Business Whangaparaoa Nomination Form Template](#) for formal purposes and present this at the next meeting for approval.

Make sure you save a copy of the template before making changes so you still have the original!

- Get this signed by all relevant parties then
- Get from the new member a profile photo and short bio
- Add this on the Business Whangaparaoa Team website page
- Add an announcement in your next newsletter
- Add their email to your contact distribution list

## Alternatively if you are removing a member -

- Take their info off the Business Whangaparaoa Team website page
  - Add an announcement in your next newsletter thanking them for their support (and an opportunity to call for new members to step forward)
  - Remove their email to your contact distribution list
- 

## AGM Management SOP

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Each year Business Whangaparaoa are required to hold an AGM (Annual General Meeting) and notice must be sent to all members.

You will not be able to hold the AGM until after the financials for the previous year end are received which can take anywhere from 3-5 months. Once you have the financials you can finalise a date and start to collate the information you are required to send out.

If you are unsure of the procedure for an AGM [here is information](#) on the notice required. If you have any matters that require a Special Resolution you need to give a minimum of 21 days notice otherwise you can give 14 days notice.

The paperwork you need to collate and send out is -

- AGM Notice and Agenda
- Approved Minutes of the previous AGM
- Annual Report from the previous year
- Annual Plan for the current year (presented by the Business Manager)
- Financial Statements from the previous year (presented by the Treasurer)
- Budget for the current year (presented by the Treasurer)
- Chair Report (presented by the Chair)
- Treasurer's Report (presented by the Treasurer)
- Any Special Resolutions if there are any

Put an event in the online calendar and add a link to all the above in the website page "AGM" which you can then share that link in your public notices. [This is the on-site page](#) which doesn't have a link from the site front end.

When you send out notice send a specific email to all members but also then include the notice in all newsletters up to the AGM. Invite all businesses to come along.

Run the event along with the Chair.

Below are some word versions of the documentation from 2023 to use as templates or for ideas =

- [AGM Notice and Agenda](#)
- [Minutes](#)
- [Treasurer's Report](#)
- [Annual Plan](#)
- [Proceedings of the meeting for the Chair](#)

The Chair will usually write their own report - no more than one page on activities in the past year and hopes for the current year and the Annual Report of the past year report will be created by the Business Manager but basically just consists of a single document combining reports from the past year from events, activities and

any other things of note into a summary of the year. The Treasurer's Report also may not be as the example but will be developed by the Treasurer as they see fit.

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## Local Board Presentation SOP

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You should organise to make a presentation to the Hibiscus and Bays Local Board perhaps twice a year. You will need to book this in so speak to your local board rep to work out the best times/dates.

The format of your presentation will be determined by what you are actually telling the board.

**Here is** a copy of a presentation to the Board in 2021 (copy also in the Google Drive folder) as an example and at the time of development of this manual we are planning on presenting to the Board on 23 July 2024.

Make your presentation approx 5 mins long and be ready for questions from the Board members.

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## Xero Management SOP - Working alongside the Treasurer

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### Bills Payable

When invoices come in to be paid by email Manager will forward on to Xero Hubdoc

In Hubdoc Manager sets up payment and saves as a draft – it's important for the Manager to put the reference as to what the invoice is for, along with the invoice number, in the reference field.

Treasurer will approve or query

Twice a month the Manager will –

- Create payment batch in Xero
- Export this and import into ASB

In ASB – remember to tick the box to show all lines in the statement so each payment can be individually identified

Once uploaded into ASB go back to Xero and delete the batch payment otherwise the individual lines will not be shown for reconciliation and reporting

ASB payments will then be authorised by 2 x signatories

The approval by the Treasurer of an invoice for payment and subsequent 2 x authorisations in ASB are considered acceptance and approval of the invoice – no signed copies of the invoice are required.

## Contacts / Xero Updates / Memberships

When there are changes in the contact CRM Manager to email details to Treasurer to set up in Xero. This relates to both members/non-members/event attendees/sponsors/suppliers. This would be for –

- Any changes in contact information
- New contacts
- New members
- Change in membership status (eg non-renewal)

The Treasurer will manage changes and additions in Xero including adding new contacts, updating, new one off or repeating invoices, etc.

## Monthly Membership Payments

Members will be offered an opportunity to pay monthly however the payments must be assigned as “auto pay”, eg comes out of their bank account automatically.

## Xero Reconciliation

Treasurer and Manager will share the role of reconciling in Xero depending on who is in the programme at the time.

If the Treasurer is unsure what a payment relates to or what funding tracking it should be allocated to they should leave for the Manager to reconcile.

## Monthly Reporting

Each month after 1<sup>st</sup> of the month the Treasurer will send to the Manager the previous months –

- Profit and Loss
- Balance Sheet
- Expenses from the month

The Manager will then combine this into the paperwork for the Executive Team to discuss at the monthly meeting.

## GST Filing

This will be the responsibility of the Treasurer

## Annual Accounts and Financial Statements

To be collated by the Treasurer in consultation with the Manager and forwarded to the Chartered Accountant for preparation

Once received the Annual Financial Statements need to –

- Be approved by the Executive Committee
- Then send to businesses and members in AGM paperwork by Manager
- Financial Statements to be approved and signed at the AGM

- A copy of the Financial Statements then need to be filed with the Companies Office where you can also update other society details

## Integrations Used –

- **Stripe** – for payments – 3% charge which is passed on to the payee
  - **GoCardless** - for payments if a member opts to pay by monthly instalments
  - **Hubdoc** – for recording and filing of documents and invoices
- 

## Email Management

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Currently there are two gmail accounts [info@businesswhangaparaoa.co.nz](mailto:info@businesswhangaparaoa.co.nz) and [support@businesswhangaparaoa.co.nz](mailto:support@businesswhangaparaoa.co.nz).

The reason for this is when we had a separate membership role. If you are going to be a full Business Manager perhaps the support email should be closed (there is a cost of \$10 + GST pm for each email).

Email management is baically just -

- Maintenance of the email account
  - Answering email queries promptly
  - Using contact lists to communicate with Executive members, Members, etc
  - There are a number of gmail templates which you can use. update or delete as you see fit
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## Social Media Management

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Business Whangaparaoa have the following social platforms -

- [Facebook page](#)
- [Facebook group](#)
- [LinkedIn account](#)

## Facebook Management

You manage the Facebook page. On this page post regularly different business related links, events and posts celebrating our Member businesses and anything else you believe would be of value and interest.

This page can be developed more with a bit more time and energy put into it than currently.

The Facebook group has 3 people managing it being the Business Manager, Danni Yu and Gwenda Holster-Dowler. Danni has been great in coming up with growth strategies, eg promotions, collaboration, etc. The Business Manager role regarding the group is two-fold -

- Post and share posts from the Facebook page

- Approve posts in the group - only general community posts, local events and member posts should be approved

The other two admin can approved community and event posts however the reason the Business Manager is the main one to approve posts is because they are the only one who has a clear knowledge of which businesses are or are not members.

## LinkedIn

Business Whangaparaoa has a LinkedIn page however a strategy for use needs to be developed for this and it needs to start to be used effectively.

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## Website Management

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For website management see separate document.

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## General Management

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The Business Manager is responsible for any matters related to the general management of the Incorporated Society.. This includes -

- Filing of Annual Financials with the Incorporated Societies after the AGM and other Incorporated Society duties - see the [duties of an Incorporated Society](#)
- Annual Insurance: We are currently insured with JB Insure and insurance is paid this annual year by monthly instalments. This becomes due in October but should be paid annually if funds allow. The Business Manager is responsible to sort the insurances.
- [Annual Enterprise Survey](#) filing - email notifications are sent
- Collation of Annual Accounts to send to accountant alongside the Treasurer

Any other obligations as may currently be omitted from this general list.

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## Network Event SOP

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Business Whangaparaoa hold quarterly "formal" network events usually in mid to late-February, May, August and November.

It has become a tradition to make the first one a breakfast meeting at Red Beach Surf Life Saving Club from 7 am to 8.30 am. This is catered by Greg from Krave Ltd (the resident caterer for the club). Greg's contact email is [kraveltd@xtra.co.nz](mailto:kraveltd@xtra.co.nz). The cost for the latest breakfast (2024) was \$23 pp and this includes a buffet breakfast

served at 7 am and includes the urn (make sure Greg has turned on when you arrive early) and tea and coffee. No juice so bring along a cold 2 litre orange juice.

The other three events for the year are evening events, held on either a Wednesday or Thursday evening from 5.30 pm to 7.30 pm.

### **Marketing and management time allowance from Business Manager: 15 hours**

Timings for the events are approx as follows -

#### **BREAKFAST NETWORKING**

- Attendee arrival 7 am
- Breakfast 7 am to 7.30 am
- 7.30 am - MC welcome/short rundown on BW activities for the year/member speel/sponsor intro (say 3 mins?)
- Sponsor(s) speaking slots (1 min each)
- 7.40 am - Intro to speaker
- 7.40-8.15 am approx - Speaker
- Wind down and thank you/ gift to speaker/invite to stay for another coffee and network

#### **EVENING NETWORKING**

- Attendee arrival 5.30 pm
- Networking and nibbles 5.30 to 6.00 pm
- 6.00 pm - MC welcome/short rundown on BW activities/member speel/sponsor intro (say 3 mins?)
- Sponsor(s) speaking slots (1 min each)
- 6.10-6.15 pm - Intro to speaker
- 6.15-7.00 pm approx - Speaker
- Wind down and thank you/ gift to speaker/invite to stay for another drink and bring out more nibbles

## **Network Event Timeline**

You may want to source all speakers for the year at the start of the year or you can look at doing this as you go approx 3 months before the event date. Timeline -

- Source speaker
- Source venue/catering (some venues we use in-house catering and others we source separately) - catering costs we usually allow approx \$350 + GST (however we appreciate food costs have escalated over the last year or so)
- Get from the speaker -
  - A photo
  - A short bio on themselves (you'll use this, or some of it in your speaker intro on the day)
  - A title for their talk
  - A short blurb about what they will talk about
  - Check if they will need a screen/laptop for a presentation
- Once you have all the above first create a billboard and event banner in Canva (there are templates)
- Then set up a registration form on the website through "Fluent Forms Pro" to add a link to your event
- Then set up an event in the online BW calendar - the easiest way to do this is to go to the Events Calendar page on site and at the very bottom of the calendar on the far left and below the "Subscribe to Calendar" button there is a linked full stop - upload the event on the form then go to the events calendar in the site backend and publish - you'll also get an email link to the event (it's much easier than adding directly in the backend!!) - or just go directly to this hidden page link! <https://businesswhangaparaoa.co.nz/events-calendar/community/add/>
- Seek Sponsors - we should already have the Hibiscus and Bays Local Board as an automatic sponsor so try to source 2 other sponsors @ \$450/\$500 + GST each. Here is a [standard sponsor sourcing email template](#) you can use if you wish.

- Once you have sponsors get their logos and add to the billboard, event banner and list and link in the online event
- Organise your roadside billboards
- Set up a Facebook event to share and link to the online calendar event for registrations
- Add details in your next newsletters to both members and non-members

## Promote the event, so prior to the event -

- Put in approx 3 x newsletters
- Share across social media channels
- A few days before you may wish to do personalised emails to some you know usually come as often this reminds them and you can pick up at least 3-4 more attendees
- Over the weeks prior to the event monitor the attendee form and as you see registrations invoice them and use Xero email template

## The week before -

- Confirm with the venue/catering/speaker
- Ask if the speaker would like to put out any flyers/information, if so offer to collect it so you can put on the tables/chairs
- Confirm with sponsors and pick up any banners/flyers/etc to put out/up
- If the speaker needed a screen/laptop make sure this is organised with them or the venue
- Again check payments and if need be do any follow ups (we do prefer if people pay before the event)

## On the day -

- Make sure you have all banners/flags/flyers to put out from the speaker and sponsors
- Take the event box. In the box will be member cards/brochures and small member pull up stand (we display member information at all these events regardless of whether the member attends or not). There are also various other potentially useful items!
- Take 2 x BW flags and pull up banner
- Export your attendee form and make easy to read for ticking off attendees, add any other attendees that may not have registered, eg speaker and take a printed copy with you
- Write out name tags before heading to the venue (just to save time - not essential)
- Put together MC talk and take a copy with you - you can use [this MC Talk template](#)
- Make sure you have a bottle of wine or box of chocolates as a thank you for the speaker and any other items you need to bring as extras (eg juice at breakfast event)

## Allow approx 1 hour for set up and -

- Arrange the room and seating as you need
- Put any information from speaker and sponsors either on chairs or tables
- Set up Members table and put out cards/brochures
- Put up flags/banners/pull ups, etc
- Put out name badges

## After the event -

- Pack up
- Gather any invoices to be paid (eg catering, etc) and arrange payments with Treasurer
- Complete any reimbursement forms for yourself (eg for the speaker gift, juice, etc), attach receipts and send to Hubdoc for processing by Treasurer - you can use [this Reimbursement Form Template](#)
- Go through and follow up any attendee payments not yet received

- Email a thanks to the speaker
- Download or obtain any photos of the event
- Complete your [event report template](#)
- Add a copy of your report to the template for the next Executive meeting when you send out Agenda, Minutes and Reports
- Arrange to change out your roadside billboards

If you're organised then now go to your history page for events for the year and add any sponsors at the top, event details and a gallery of your event poster and photos.

You should also go to your Annual Report and copy and paste your event report into this ready for the end of the year reporting.

#### Templates included in this process -

- [Standard sponsor sourcing email template](#)
- [MC Talk template](#)
- [Reimbursement Form Template](#)
- [Event Report template](#)

## Suggested venues

- The Archer is good as you can book out the conservatory, it has a screen (x 2) for presentations and there is in-house catering
- The BeerSpot is also quite good - book the nook at the end of the bar. The acoustics aren't the best but not bad. Screen but it is around the corner. Catering from the food truck outside so it depends on who it is as to the type of food. You can usually find out beforehand who it will be and contact them directly.
- Paraoa Brewing again good for in-house catering. Again acoustics aren't the best. You are better to get a mic and speaker set up as with The BeerSpot also
- Manly Bowling Club is a great venue. Cost is \$200 + GST and there is no in-house catering so you have to organise and this is additional. Keep in mind club nights, etc. Same for all the above bars keep in mind nights with events, eg quiz nights
- Stanmore Bay Boat Club again a cost like the bowling club. They do have a caterer you can use but the costs are separate. Again keep in mind club nights.
- Weiti Boat Club is an excellent venue but their costs have increased and you also need outside catering and to pay for a bar licence and a bar man. Priced themselves out of our range at our last discussion.
- The Future Whangaparaoa Hub
- Local business premises
- You could perhaps consider some restaurants on a quiet night (eg perhaps a Tuesday?)

## Buy Local Campaign SOP

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We try to hold a Buy Local campaign each year. The winter months are often good for this.

In the past we have experimented with a number of different events including Eat Around the World in 80 Days (loosely based on Round the World in 80 Days!) this was alongside Destination Orewa and Silverdale Business and designed to showcase all the different cuisines available around the Coast and encourage locals to get

out and support our local restaurants/cafes. In 2021 this was an industry in particular need of support after Covid.

In 2022 we ran a big campaign "Buy Local" with entry boxes around the Peninsula encouraging people to fill out a form and submit receipts. We were donated lots of great prizes from local businesses in return for promoting and acknowledging them. This worked well however proved to be a huge amount of work with needing to process boxes of written forms and receipts. We did not run a Buy Local campaign in 2023 mainly because we were busy with Town Centre Meet Ups, creating brochures and set up of Giant Family Fun Days.

2024 is planned to be very similar to 2022 but we are aiming for an online process only. The aim is to run the event as follows (note Destination Orewa ran a very similar event in May 2024 so have templates and happy to offer advice and support on the management and running of the campaign) -

## 2024 Buy Local Campaign

To manage a Buy Local campaign you will probably run this over a calendar month. Below is a suggested campaign for 2024.

### Format and Budget

Proposed dates: **1 to 30 September 2024**

Format: Online only. Spend min \$20 in any Whangaparaoa business or Member of Business Whangaparaoa, complete the online form, submit a copy of your receipt (pdf, jpg, png) with the form and go in the draw to win. You must keep the original copy of your receipt as proof of purchase to produce if you are a prize winner.

Prizes to be decided – Either budgeted for or collect a range of prizes and vouchers from local businesses which will be promoted through all media channels. Depending on the number of prizes gathered will determine how many prizes can be offered.

Required –

- Online page with submission form (including ability to upload copy of receipt)
- Links to list of BW members (possibly have some offer eg if you spend with a BW member or a prize donor you get a bonus entry into the draw???)
- Links and logos for prize donors
- Link to full T's and C's for entry, etc

The form will need to have fields for name, phone, email, amount spent, where spent, upload receipt - by capturing the place and amount you'll be able to track easily by exporting form data to a spreadsheet.

[Here's a link to Buy Local Terms & Conditions](#) based on the campaign run by Destination Orewa in May 2024.

## BUDGET (EST ONLY)

### Buy Local Campaign

- Flyers/posters print per campaign (eg DLE flyers to put around places/posters in windows) – Nos to be confirmed - \$200.00
- Billboards @ \$450 x 2 - \$900.00
- Miscellaneous eg prizes, etc - \$250.00 (if you don't source sponsored vouchers)
- Radio, newspaper and social media marketing - \$600.00
- Marketing and management x 40 hours @ \$40 ph - \$1,600.00

- **TOTAL EST COSTS FOR BUY LOCAL CAMPAIGN - \$3,550.00**

## TIME ALLOWANCE

Set Up, prize gathering, print design, marketing and promotion, management of form entries, draw completion, distribution of prizes, wind down, reporting

**40 hours @ \$40 ph = \$1,600.00**

In the Google Drive folder under Past Events you will find templates and examples of our 2022 promotion and samples are in Canva.

Because a Buy Local campaign can vary on how you run it and what you do below are just a few pointers to keep in mind when planning.

Sort funding if required (you'll need to have done this prior to your planning if you need sponsorship or funding)!

## Buy Local Set Up

- Set up your pages online
- Sort your roadside billboards
- Seek prizes
- Sort your advertising channels

## Running the event

- Monitor forms coming in
- Run your social campaign

## After the event

- Draw prizes and arrange delivery (take photos for a newspaper article and for social promotions)
- Work out stats, eg total amount spent, where, etc - you can often use these in your membership drive to local businesses
- Sort roadside billboards
- Sort your report

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## Giant Family Fun Days SOP

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In 2022-23 year Business Whangaparaoa was granted some funds from Auckland Council which they combined with Destination Orewa. The purpose of this funding was to develop "placemaking" activities on the Hibiscus Coast. We opted to purchase some "giant" games to use at events.

Destination Orewa already hold a number of annual events and markets where the games could be used but Business Whangaparaoa had no such events. Hence we commissioned Chris from AllBrand to help us develop a new concept.

The idea of the Giant Family Fun Days are so we can drive the local community into the new "districts" along the Peninsula we had defined through our Town Centre Meet Ups earlier in the year (2023).

With the new branding and some funding from Hibiscus and Bays Local Board we opted to start with 3 "district" Family Fun Days. Alongside a small committee from 2 of the 3 districts (Karepiro and Manly Village) and combining the third event with the Vine Church "Carols on the Canal" Christmas event at Gulf Harbour we held these for the first time in 2023 and plan for these to become annual events and later expand also to other "districts".

## Giant Family Fun Day Procedures

### Event set up

- Make sure you get any local businesses on board, especially those you will need permission from and that will be directly affected by the activity.
- Decide on dates and confirm this suits all parties
- Book in any machines/activities you are going to run, eg book in games from Orewa storage, candyfloss machine, bouncy castle, sausage sizzle, anything the local businesses would like to do. Party Kingdom have bouncy castles for hire and also have the candyfloss machine.
- Seek a fundraising group as volunteers to set up, monitor and pack down giant games (you will need approx 5-6 volunteers for games management) and they should also run the candyfloss machine and sausage sizzle (both raising funds for themselves), eg Grandparents Raising Grandchildren, a student saving for a trip, any other local charitable groups seeking fundraising opportunities.
- Create your Health and Safety Plan - here is a [Health and Safety Plan template](#) from 2023 you can use and update if required.
- Family Fun Day preparation, sorting games, setting up trailer, visiting Karepiro businesses in event vicinity, meeting with Karepiro sub-committee, finalising sponsors, organising and pick up and drop off of popcorn machine, candyfloss, bouncy castle, sausage sizzle, etc. Creation of Health and Safety Plan and Operational management, organising signs and posters, set up and running the event Initial preparation work for Manly Village event and talking to Manly Village businesses as above Meeting with Vine Church re combining Gulf Harbour events and sorting initial site map
- Seek Sponsors for the event to help cover costs of machine hire, event management, etc (2023 we got 3 x sponsors @ \$250 one from each of the areas where we were holding an event, however we allowed their banners at all events and promoted them all overall) - in 2023 we also had a small Local Board community grant we used to develop the branding and help run the events
- Get updated date stickers for your peg and cable tie road signs
- Print some posters and get out into the community
- Set up your events in your online calendar and social media events
- Start your promotion from about 6 weeks prior to the first event
- See if the local Manly Fire Brigade is available to attend the event, this is both for Health and Safety but also the kids love the fire truck!
- If you are going to give away lollies get this sorted (sometimes Destination Orewa may have some you can have otherwise source or get sponsored and buy from Gilmours)
- Do a short notice to deliver to all local businesses in the area advising them of the event and inviting them, if they want to be part of it to promote their business, to let you know and deliver these.

### The week before

- Go out and put up your Giant Family Fun Day signs
- Make sure you are organised for pick up or drop off of any machines you've hired
- Ensure your volunteers are all set
- Organise how you will get the games to the venue

## The day of the event

- Get there early
- Organise set up
- Ensure you have an information table which should have a fire extinguisher, BW information
- Pack down
- Take down roadside pegs/cable tie signs to ensure these aren't cut down and thrown away as you will put the next date sticker over the top and reuse for your next event. (if you can't do this the same day just make sure you do it fairly promptly after the event)

## After the event

- Return games and any other machinery as required
- Prepare your event report for the BW Executive meeting
- Organise any **reimbursements** required.
- Call in and thank any local businesses directly affected by the event (eg affected their parking/access/or other)

Again you should find all templates and past examples in the Google Drive folder and or in Canva.

## Note in 2023:

- We had additional sausage sizzle at Karepiro only run by Grandparents Raising Grandchildren (they couldn't provide enough volunteers to support the games)
- We ran candyfloss and popcorn machines however the popcorn machine had to come from Warkworth, this ended up being more of a nuisance than it's value - I would suggest 2024 you leave it and instead have a sausage sizzle
- Candyfloss machine just needs one of Jess's kids to give a little training to the volunteers the first time they use it (it is quite simple to operate)
- Bouncy castle at Manly Village we put down the side by YOU Travel however there would have been enough room to put this in the upper car park with the games
- Gulf Harbour we also had Hungerball and the sausage sizzle is organised by the Vine Church. They also paid for the bouncy castles at this event which was good!

## Useful Contacts

- Jess at Party Kingdom - [022-352-7759](tel:022-352-7759) - [info@partykingdom.co.nz](mailto:info@partykingdom.co.nz)
- Vine Church, Philip Corser - [philipcorser54@gmail.com](mailto:philipcorser54@gmail.com) - Philip is the key person who organises the Carols on the Canal event
- Possible contact if you're looking for a Santa - Robert (Bob) Richmond - [rimbrichmond@extra.co.nz](mailto:rimbrichmond@extra.co.nz)
- Hungerball - Andu Lordache - [andu@hungerball.com](mailto:andu@hungerball.com)
- Sponsors we had for 2023 - \$250 as event sponsors - YOU Travel Manly, Pandora's Closet, Richard Bruce Fitness. Smaller sponsors who had acknowledgement and small signs by candyfloss - Storage 4 You, Liquorland Manly (unable to have signs for liquorland however we placed the candyfloss outside their door and used their power and ensured we got their logo in a lot of the coverage photos)

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## Christmas Casual Networking SOP

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These are networking events but designed to be very casual events to celebrate Christmas and mid-year Christmas and an opportunity to thank our members by inviting them along and we subsidise the cost of drinks

and provide nibbles. We do not have a speaker at this event but you may choose to have a short intro and update from either (or both) the Business Manager and the Chair.

**Time allowance for Business Manager: 6 hours per event**

## Event set up

Once you have your dates -

- Select your venue and book in
- Update your social and newsletter images
- Add in your newsletter templates from about 6 weeks prior (if you pre-prepare these)
- Whilst you don't require RSVP it is good to ask if people know they are coming to let you know just to gauge numbers
- Do personalised member follow ups a few days before the events
- Confirm with the venue a week before and discuss food options
- Ensure the venue is up to speed with the discount voucher system and how it will work

Business Whangaparaoa offer discount drink vouchers to Members only but invite all business owners/managers and provide the nibbles free. You will find a publisher version of the drinks voucher template in the Google Drive folder (you need to change date and venue each time). How this works is -

- As Business Manager, you hand out a voucher (or two) to the member and their guest when they arrive
- They present their voucher when they purchase their drinks and get the discounted drinks price
- At the end of the evening the venue will count up the number of vouchers and calculate the amount due which you will pay with the food costs
- You will complete a [reimbursement form](#) to subsequently be reimbursed by Business Whangaparaoa

Note all templates can also be found in the Google Drive folder and/or Canva.

## On the day

- Arrive early at the venue
- Set up your flags and banners
- Ensure the bar staff are familiar with how the drinks discount vouchers will work
- Decide when and what you will order around the food
- After the event pay the accounts and pack down

## After the event

You will then need to get reimbursed and prepare an event report for your next Executive meeting.

It is important to note that whilst you can claim the food costs under any funding arm you have you **cannot** claim the balance paid for the discounted drinks and so this will need to be recorded as a Business Whangaparaoa cost.

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## Meet the Candidates SOP

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You will become involved in two elections where you are able to host Meet the Candidate events. These are -

- Local Board elections - held every 3 years, next elections in 2025
- General Election - depending on when the Government calls an election but usually every 3 years, next elections expected 2026

We also have past event information with templates in the Google Drive folder. You can find some general guidelines for running a "Meet the Candidates" event from Auckland Council [at this link](#) however we also have our own templates.

The timings during your event will be really important however will vary with each event depending on how many candidates you need to get through. In the Google Drive Past Events folder you will find all the templates for both events run in 2022 (Local Board elections) and 2023 (General Election) -

- Rules and Procedures
- Timeline
- MC notes
- Name tags for candidates
- Promotional visuals

It is wise to bring in an external MC to run the event and for the Business Manager to be the time keeper. You can use your phone for this but also have the bell in case you need to stop someone who is not playing by the rules!

## Event set up

- Sort your date, venue, etc, book and confirm - ensure you can have a microphone
- Sort catering if required (usually just tea/coffee/perhaps an open bar for drink purchases depending on venue and time of day) and book
- Sort your roadside billboards
- Get all contact details for candidates
- Contact the candidates inviting them to present at the event
- Contact Hibiscus Matters and try to secure coverage of the event
- Sort advertising (for this one it is often good to put a small advert in the local paper since it is open to all the community - this is not a business only event)
- Work out your timings alongside the MC (this is often hard until you have confirmation from all candidates as to whether they will attend or not)
- Once a candidate is confirmed advise you'll send out the rules and timings approx 4-5 days before the event
- Finalise timings and rules
- Send information to candidates as soon as you are able to finalise to allow them time to prepare (you can give a bit of a heads up to those who ask about approx timings as you'll have some idea of these)
- Re-confirm your venue, catering, etc

## Day of the event

- Arrive early
- Set up, you will need to set up candidate chairs in a row across the front and audience chairs in rows with a central aisle
- Make sure your set up allows easy access to toilets, has a registration table including pens and paper to write questions from the floor and easy access to food and drinks after so chairs don't have to be moved.
- Have at least 2 people on the door - they need to ensure everybody is aware you will **NOT** be taking questions from the floor and if they have a question for any particular or all candidates they need to write it on a piece of paper - these will then be submitted to the MC and time keeper to work through best to present/cull any controversial, and work out how much time to allow for responses and how many questions they may be able to get through in the prescribed time.
- Stick to timings as strictly as possible!

- Allow time after for candidates to mingle with the audience and enjoy the catering
- Pack down

## After the event

- Prepare your event report for the BW Executive meeting
- Organise any [reimbursements](#) required.
- Email a thank you to candidates who attended
- Arrange to change out your roadside billboards
- Liaise with Hibiscus Matters (or as required) on public reporting in the media

## Town Centre Meet Ups SOP

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These were events we set up to hold in newly identified "Districts" along the Peninsula. Because the Peninsula is long and thin it is a challenge to be able to bring all businesses together - there's quite a distance between Red Beach and Gulf Harbour and a challenge to support all in similar ways.

We split the Peninsula up into 6 Districts being Gulf Harbour, Manly Village, Coast Plaza District, Karepiro District, New World Shopping District and Red Beach (incorporating Hilltop Shops). An event was held in each District (except Red Beach as there was a very poor response to event call out). We held a couple of events prior to Covid and then these were on hold for quite a long time.

At each event we invited along Hibiscus Coast Zero Waste who spoke briefly on climate action obligations for business as well as their City to Farm and Green Schemes supporting local and also Manly Fire Brigade who talked about safety and security tips for businesses. From both of these we subsequently have been working alongside Hibiscus Coast Zero Waste and local businesses on the [Green Scheme](#) project and also developed [an online information page](#) on our BW website of a collation of all the information imparted and discussed with Manly Fire Brigade.

Whist turn out was low at some events (biggest turn out at Paraoa Brewing for Coast Plaza District and Gulf Harbour both events had a good turn out) each event was very enlightening and two resulted in small local committees being set up (Manly Village and Karepiro District) and subsequently the Giant Family Fun Day events which it would be good to expand further and the District brochures for each of these two areas.

It may be an idea to again hold these town centre meet ups as they weren't difficult to organise and were a great opportunity for a touch point and the Business Manager to go in to every business in each district and leave information and ask questions and continue on the awareness campaign.

## Event set up

- Choose venue and confirm
- Work out catering/drinks/etc (see below for some comments on past events)
- Set up an email campaign you will send **ONLY** to businesses within the specified area
- Invite any organisations you feel could be of interest/value to have a short talk (eg we got in Community Patrol at the Coast Plaza event as one of the major concerns in that area is crime and shoplifting)
- Create a flyer and print similar No of flyers to the No of businesses on your database for the area
- Walk the streets and visit the businesses, invite them to the event, leave a flyer and use this for any other touch points you wish
- Add event details in your newsletters
- Run your social media advertising campaign

- Confirm everything and send personalised email reminders to all businesses in that district a few days before the event

## Day of the event

- Arrive early
- Set up flags, banners, seating, etc
- Confirm catering, drinks, etc
- Run the event
- Pack down

## After the event

- Prepare your event report for the BW Executive meeting
- Organise any **reimbursements** required.
- Email a thank you to each of the business owners who attended
- Send a brief meeting report to **all** businesses in the district for their information and as another touch point

Templates and databases can be found in the Google Drive Past Events folder and many of the businesses in our online database have been tagged in their appropriate area (this does need to be checked though).

## Past event information

### Events have been held in -

- Gulf Harbour - 2 events - Cherry Cafe on 20 May 2021 and Mainsail on 29 March 2023
- Manly Village - 2 events - Cafe Manly on 11 March 2020 and India Village on 15 March 2023
- Coast Plaza - 7 June 2023
- Karepiro District - 21 June 2023
- New World Shopping District - 17 May 2023
- Red Beach - none but planned 26 April 2023 - Red Beach was only officially incorporated in the Whangaparaoa District in early 2023 as previously Silverdale "claimed" the area to be in their business district. Red Beach is in fact an independent district from "Silverdale" and "Whangaparaoa" with Whangaparaoa officially starting at Viponds Road.

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## New Member Creation SOP

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## New Member Set Up Procedure

When you get a new member –

- If they haven't completed a membership form, fill out a form as this also adds them to the Member database in CRM
- Update their record in CRM with additional details, eg Business name, etc
- If sales is signing up at a premises, get a photo of the owner with our brochure showing their premises/logo - you can use this for a Facebook post

## New Member Website Set Up

To upload on site -

- Go to WP Engine
- Go to Fluent Forms Pro | Forms | Business Whangaparaoa Membership Application Form
- Open the form
- Open a second tab
- Go to Contact CRM | Contacts
- Open the Contact
- Check and add any fields not complete as follows –
  - First name
  - 
  - Last name
  - 
  - Email
  - 
  - Address (line 1 and 2)
  - 
  - Phone (with dashes) (eg 021-986-2222)
  - 
  - Business
  - 
  - Business category (ies)
  - 
  - Advertising Start Date
  - 
  - Advertising End Date
  - 
  - Schema (if you need to look up go to [schema.org](https://schema.org))
  - Their website (inc https://)
- Put in List: Members and also in Local Businesses and Tags: their business directory category(ies) - some businesses may be in more than one category

**Then go to Canva to make their logo - make a 350 x 350 image**

**Then go to WP Engine | Businesses –**

First check to see if you have a listing (unlikely), if not

**New Business add (can copy fields from the form) –**

- Title: Business name
- Phone
- Email
- Web address
- Address
- Suburb (drop down)
- Business type/categories (these are the directory pages the listing will appear on – can be more than one)
- Membership: Member
- Business Name (added by Vincent) (must add this as this is what is used by the search)
- Price Range: \$
- Keywords
- Main short description
- SEO – Titles settings – Title and Meta description
- Social – copy Titles settings for both Facebook and Twitter

- Add schema at bottom of page
- Upload the logo you just created in right column under Feature Image
- Add tag: member
- Add their member special as per below instructions
- Update
- Publish | Publish

## Add Member 2 Member special

- Then in the top of the page below the heading
- Add an H3 heading (make size Medium (right column)) and put the business name – centre (this may seem odd as you already have their business name but note that one won't appear in your content screen so you need to add a second one)
- Add their linked website immediately below – centre
- Then below add their Member Special using the template below (or if they don't have a special add no special template below)
- Paste the following template wording and change to suit
- Go to the front end and find the page by either clicking on the member special link at the bottom of their listing or under .../business-listings/business-name
- Then go to bitly and create a QR code for their page
- Customise with white SCAN ME border around
- Download and save
- Back in your business page create an image and upload the QR code
- Make the QR code 25% size and align centre
- SAVE
- Open Paintshop or whatever snap dump programme you use
- Screenshot the whole special
- Save
- You'll be able to now send to the member

If they don't have a special just put in the offer line “**No current special available**” and don't add a QR code

Template wording for special:

### **Business Whangaparaoa Member:**

**01 April 2023 to 31 March 2024** (*membership dates*)

Member website (linked)

Make this their short description and include their address and linked phone number. (*Don't make this too long*)

**MEMBER OFFER: 10% discount on all services to BW members** (*special*)

## Go back to your contact in Contact CRM -

- Emails | Send Email | Use Email Template | Import template – New Member check uploaded listing
- Fill in all relevant details
- Send

## Facebook Welcome post

In Canva create a Facebook post image - 600 px wide x 314 px high

Schedule in Hootsuite with following wording for over the coming week

*Business Whangaparaoa would like to celebrate our newest members and thank them for their support. Please support ... tag in business if can and short blurb then link in phone, email, web address*

- If you can't tag in the business add a link to their FB page at the end of the post
- Once the post is published take a snap dump of the post to email to the owner

**Then go to Xero or send details to Treasurer –**

- If you complete Xero
- Create a new contact | SAVE
- New | Repeating Sales Invoice
- Will need to put in due 7 days after the invoice and tick “Approve” (NOT approve and send)
- Dates for every 12 months
- Fill in Reference | Item is 204 – Membership
- Check all details | Approve and email
- Select template “BW new member report”
- Tick send me a copy and attach PDF
- SEND

The Treasurer will monitor payments

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## New Member Checklist

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### **New Member CHECKLIST – Get the best out of your Membership**

This checklist is online and is linked in the welcome email you send out to new members.