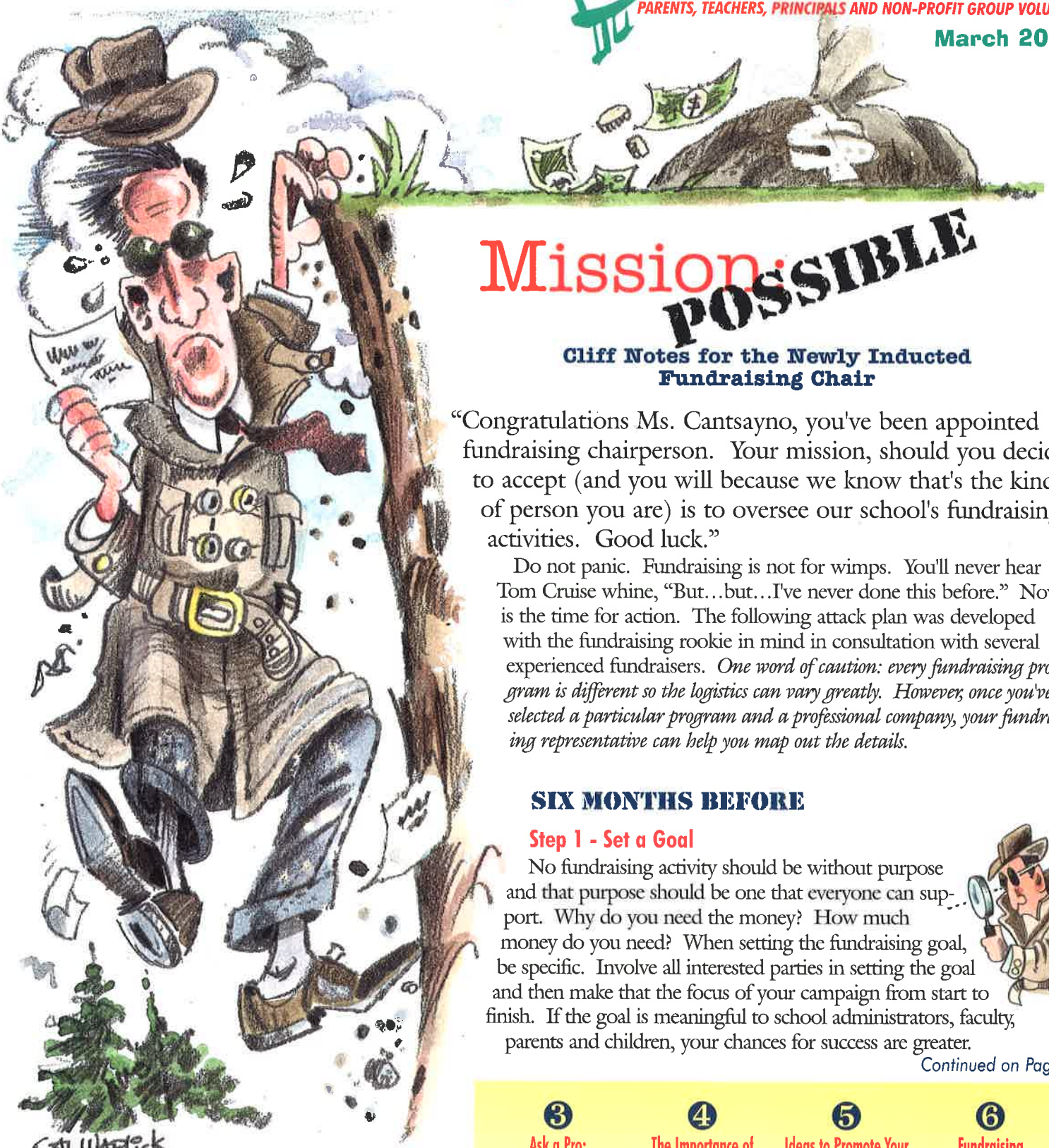


THE FUNDRAISING EDGE

A RESOURCE ON PRODUCT FUNDRAISING ISSUES AND TRENDS FOR PARENTS, TEACHERS, PRINCIPALS AND NON-PROFIT GROUP VOLUNTEERS

March 2000



Mission: POSSIBLE

Cliff Notes for the Newly Inducted Fundraising Chair

“Congratulations Ms. Cantsayno, you’ve been appointed fundraising chairperson. Your mission, should you decide to accept (and you will because we know that’s the kind of person you are) is to oversee our school’s fundraising activities. Good luck.”

Do not panic. Fundraising is not for wimps. You’ll never hear Tom Cruise whine, “But...but...I’ve never done this before.” Now is the time for action. The following attack plan was developed with the fundraising rookie in mind in consultation with several experienced fundraisers. *One word of caution: every fundraising program is different so the logistics can vary greatly. However, once you’ve selected a particular program and a professional company, your fundraising representative can help you map out the details.*

SIX MONTHS BEFORE

Step 1 - Set a Goal

No fundraising activity should be without purpose and that purpose should be one that everyone can support. Why do you need the money? How much money do you need? When setting the fundraising goal, be specific. Involve all interested parties in setting the goal and then make that the focus of your campaign from start to finish. If the goal is meaningful to school administrators, faculty, parents and children, your chances for success are greater.



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Step 2 - Recruit a Committee

New fundraising chairs often try to do too much themselves rather than delegate. Recruit a team of three or four parent volunteers to help organize the activity and recruit any other needed

volunteers. For example, assign one person to take care of publicity; two to handle money collection and record keeping; and another to manage delivery logistics.

Step 3 - Select a Company

Get this right and the rest should be a cakewalk (pardon the expression). Pare down your list to two or three companies and make appointments with each. Allow enough time (at least 45 minutes) for a proper presentation. Step 3 is not the place to skimp on time and effort.

Competing companies will need to know your group's financial goal; the number of potential participants and their ages; and any historical information you can provide (e.g. past fundraisers, participation levels, successes and failures).

You will need to learn from each of the companies you interview:

- ⌚ How long has the company been in business?
- ⌚ How many years of experience does the company representative have in fundraising?
- ⌚ Are the program's product/s of high quality that the organization will be proud to stand behind?
- ⌚ What services are available to save you and your volunteers time and energy?
- ⌚ How will the program work? Are products paid for in advance or upon delivery?
- ⌚ Does the company understand and comply with your state sales tax laws?

- ⌚ How is safety addressed? Does the company discourage unsupervised door-to-door sales? Will adult supervision be stressed? How will these points be communicated to parents? Children?
- ⌚ What promotional assistance will the company provide? (kick-off assemblies; parent letters; posters; samples for display; etc.)
- ⌚ Is there an incentive or prize program? If so, who pays for it?
- ⌚ How are products shipped and when? Who pays the freight?
- ⌚ What is the policy regarding damaged or unsold product? What about back orders?
- ⌚ Will there be a written agreement?
- ⌚ Can the company provide references? (Be sure to call and check these references.)

Again, it's important to remember that there are many types of fundraising programs. Not all of the above criteria may apply to your organization or the company with whom you choose to work.

Once you've selected the firm, set the dates and place them on a school or community activities calendar to avoid overlap within your own school or neighboring schools. Clear activities and crucial dates with appropriate officials (school principal, coaches, and custodians) to avoid conflicts with other events.

Now relax for a few months.



ONE MONTH BEFORE

Step 4 - Final Planning

Contact your fundraising representative and meet with your fundraising committee to review

logistics. Make a list of materials that you'll be responsible for and those that the company will supply. Determine how many adult volunteers you'll need to execute the fundraiser at every step.

Develop a master schedule of important dates for everyone to use as his or her blueprint. Include such details as: advance promotion (press releases, newsletter articles, billboards); arrival dates for company materials; kick-off activities with students/teachers/parents; deadlines for orders/money to be turned in; reminder notices/P.A. announcements; delivery of products and prizes; announcement of results to all participants; volunteer appreciation; and a wrap-up meeting to review the entire event.

Let teachers know about the fundraiser so that they may incorporate it into their lesson plans.

ONE TO TWO WEEKS BEFORE

Step 5 - Advance Promotion
Send a flier home to parents announcing your fundraising goal and when they can expect to receive their fundraising packets/products.

Put up posters around the school and post dates on the school billboard, web site and on the homework hotline. If an open house or parents meeting is scheduled, arrange a display with product samples from your fundraising project.

ONE TO TWO DAYS BEFORE

Step 6 - Countdown

Touch base with fundraising company, school administrators and custodians to reconfirm logistics.

Gather and sort the supplies you'll need from the company. Check in with your committee and team leaders. Call volunteers to remind them of their responsibilities and when they're needed. Post reminders to teachers, explaining procedures, reminding them of the goal.



D-DAY

Step 7 - All Systems Go

This is when you start to congratulate yourself on all the careful planning. Kick-off activities, if scheduled, go off without a hitch. Appropriate materials finally go home to each family. If your particular event will last over a one- or two-week period, make your final preparations to motivate volunteers. Remind volunteers of important deadlines; the group's ultimate goal and what progress has been made.

Some families may jump right on the fundraising project, returning their order forms/money immediately. So it's a good idea to review your process for order and money collection to ensure these

early returns are accounted for. Likewise, now is the time to review your plans for product delivery first to your school and then to the end-user. Touch base with the fundraising company representative for an approximate date of delivery. Reconfirm availability of space with school officials. If parental pick-up is planned, begin scheduling times once a firm delivery date has been determined.

Step 8 - Product Delivery

Again, fundraising programs will vary widely. Sometimes products will go home with students. Sometimes parents will pick up the orders. There are some instances that the product may go directly to the end-user. Have enough volunteers on hand to handle products at the appropriate time, making sure there is someone to trouble-shoot missing orders. Forward appropriate paperwork (invoice, purchase orders) to your organization's treasurer or bookkeeper to ensure prompt payment. Then, congratulate yourself again on yet another well-executed plan.

Sources: *Raising Funds for Your Child's School* by Cynthia Francis Gensheimer (publisher: Walker and Company, NY); *Music Booster Manual* published by The National Association for Music Education; *Earning More Funds* by Chip and Ralfie Blasius (publisher: B.C. Creations, Fort Wayne, IN); fundraising guidelines provided by the Ohio and Washington State PTAs; *Fundraising Checklist*, published by the Association of Fund Raisers and Direct Sellers (AFRDS) and the insights of several AFRDS members.

ONE MONTH AFTER

Step 9 - Evaluation

Did your group meet or exceed financial expectations? Are plans underway toward implementing the originally stated goal? (Is the new playground equipment on the way? Are the field trip plans complete?) Communicate the final fundraising results by P.A., billboards, newsletters, parent letters, etc., thanking participants for their support. Meet with your committee to review the entire activity and any notes taken along the way to identify improvements for next year. Provide an overall report to the school principal in a brief meeting. And provide your fundraising company representative with your feedback.

Now you can proudly pass on your file and vast knowledge to the next, more fortunate fundraising chair, because ... congratulations, Ms. Cantsayno, your successful fundraising efforts just landed you the position of incoming President!



Ask A Pro: About Percentage of Profits

Too often percent of profit becomes the decisive factor for choosing one fundraising program or company over another. Some groups flat out refuse to do business with companies who offer percentages beneath a certain level. Is this a wise practice? We asked a couple of product fundraising professionals just how important percentage is when making sound fundraising decisions.

I do not engage in bidding wars over percentage. As a result, my customers know my prices are fair and the services are worth it. If a company is offering a higher percentage, find out why. It usually means product quality or service is less than you expect or the retail price is higher than it needs to be - all of which will ultimately hurt sales.

Jamie Silver, Miami, FL

"You can't put % in the bank." It may sound trite but it's true. Percent of profits is important but it's not going to make or break a fundraising project. Product quality, service and delivery are more important especially now that there are fewer volunteers with less time to invest. It's naive to think that you're not losing something when you gain even a few percentage points.

Kurt Koehler, Kutztown, PA