

# Fundraising Planning Guide



We are  
here to help!



## PLAN YOUR WAY TO AN EASY FUNDRAISER

Taking the time to make a plan is key to getting the most out of your group's fundraising program. During the fundraiser there is always a lot going on, so a clear game plan will help keep you focused and organised and make the fundraising drives run easily for your co-ordinator and members.

Following are several key elements on Program Management:

- Setting Goals for the group
- A memorable Kick Off
- Maintaining excitement for the duration of the sale
- Finding helpful volunteers
- Motivating the members/sellers
- Motivating the teachers and staff members to promote the sale.

### Review

Review the successes and setbacks you experienced with past campaigns to determine what should be done differently this year.

### Setting your goals

Have a clear set of goals of what your group wants to enact in terms of improvements/ additional equipment etc. and the necessary funds to be gained through fundraising to achieve these goals.

## Fundraising Co-ordinator

Whilst you will need to appoint a fundraiser co-ordinator to manage the fundraising program for the year, the coordinator can enlist support through group members to assist with the running of individual fundraisers.

## Planning your fundraising programs

Some groups will do over 10 fundraisers a year. Consider one major highly profitable fundraiser a term. Your coordinator will not get burnt out and your parents/supporters won't become de-motivated with constant requests to support many fundraisers.

Fundraising calendars for planning your fundraisers are a helpful tool and can be downloaded free from our website at [www.australianfundraising.com.au](http://www.australianfundraising.com.au)

## Timing of your fundraiser

Always consider other factors that may impact of the timing of your fundraising and therefore the final results: camps, events at school and holidays.

## Choosing your fundraiser and supplier

Do some homework.

View the websites of potential suppliers and create a short list. Using the 'Information Request' on websites such as [www.australianfundraising.com.au](http://www.australianfundraising.com.au) makes this task easy in obtaining information.

### Questions you need to ask:

How long has the company been in business?

Do they have the support staff to back you up?

What is the percentage profit of sales?

Whilst % of profit is always important, also consider what a supplier offers such as free prizes, posters, administrative support. Free prizes can increase your sales by up to 40% which translates into overall higher profits for your group.

Is the product high-quality?

Quality products equal quality revenue returns.

Does the supplier provide services that will help save volunteers' time such as checklists, parent's letters, promotional posters, tally sheets, pre-sorting of chocolates, CD accounting programs?

Is there a prize incentive program? If so, who pays for it?

Do you have to pay for product up front before you commence selling or after the finalisation of your fundraiser?

What is the returns policy if you over-order?

Make sure you are aware in advance of how your fundraising company will handle missing or damaged items. Will a replacement or refund be provided?

### Timeline for fundraisers

"Not another fundraiser!"

Heard that before?

Then your group is at risk of fundraising fatigue. In your group's enthusiasm, you've burnt the candle from both ends. Your supporters are feeling assaulted by never-ending 'asks'.

Adopt the motto: "do a few, and do them well". Focus your efforts on a fundraising program that makes the most money with the least time commitment from volunteers. Remember, one fundraiser per term or a couple a year – done really well – uses less energy and effort and won't burden anyone.

Short and sweet is considered the best! 2-3 weeks is the ideal period that you request your supporters to sell/gain sponsorships etc. It's short to avoid burnout, but long enough to include two weekends of prime selling time. If they can't do it in 2-3 weeks they never will.

Supporters may put off being active from day one if they think they have plenty of time and then they forget about it or run out of time when they eventually get around to do something.

By keeping it short, your supporters will also receive their products and prizes quickly. No one hassling your coordinator as to where their products are!

## Management of individual fundraisers

### Team

Your co-ordinator should have a team of people supporting with the various tasks for the individual fundraiser. As fundraisers aren't the same, the co-ordinator should make a plan of the various elements that make up the fundraiser and put people in jobs; a cookie dough order form drive is very different from a direct chocolate drive. Your supplier will assist with these preparations.

Your co-ordinator should develop a check list of things to do and meet with the volunteers to distribute tasks and set deadlines.

### Monies

There are specific procedures for the collection and recording of funds received from your participants such as ensuring you record all monies received against member names, banking on the same day as you receive the funds, perhaps providing receipts and a second person checking the receipt of monies. If you are a school, your State P&C/P&F Association can greatly assist with providing information on cash collections.

### Accounting Records

You will need to maintain good records of products sent out to your members and from whom you require unsold products/monies back, orders/monies received back from order form drives etc. You need to easily and accurately know who owes what at any time. Your supplier can assist with tally sheets and at Australian Fundraising we supply easy to use computer programs which automatically

tally your orders, maintains an on-going list of outstanding members, produces reminder letters and much more.

In some states, P&C/P&F's have to keep their records for 7 years.

## Selling the Fundraiser

### In advance

Prepare your students/members and parents by telling them about the program, the key selling points for the products and the reason/goals for the fundraiser.

Two weeks/one week before the commencement of the fundraiser, put something in your newsletter, advise students at weekly parade and send an email to parents/supporters.

### At commencement of fundraiser

#### Kick-off

Plan a kick-off of your fundraiser. This could be at a school assembly or at training. Advise your members of the products/program you are sending home, where they are to return monies/unsold chocolates/order forms/ sponsorship forms, final date for return of monies/unsold chocolates/order forms/ sponsorship forms, prizes, reasons for the fundraiser and of course safety first.

#### Letter accompanying order forms/carry packs

Always send home an accompanying letter advising parents/members of the reason for the fundraising, sell up the products, where monies/unsold products/forms to be returned,



final date for the return of monies/unsold chocolates/order forms/sponsorship forms prizes and of course safety first.

#### Follow ups during the running of your fundraiser.

Include reminders in your weekly newsletters also send teachers a reminder. Remind your students/members at weekly parades.

#### Send home a letter

3-4 days prior to the final date for returns, send home an individual letter via your students/members reminding parents of the final day for orders/return of unsold carry packs.

Australian Fundraising will supply the above letters to you from which you can easily photocopy.

#### Keeping Everyone Motivated

Answer questions and let everyone know how sales are progressing. Advertise your ongoing sales through your weekly newsletters or by using a Fundraising Thermometer which can also be downloaded free from our website at [www.australianfundraising.com.au](http://www.australianfundraising.com.au). Keeping the fundraiser fresh in your members and parent's minds will ensure that they don't simply forget that they are supposed to be selling; it will ensure you keep your fundraising team motivated until the end!

#### Fundraising Feedback

Take time to listen to your students/members and parents as they tell you about the response to the fundraiser.

Do they like the product? What questions are being asked the most? The feedback from your group can help streamline your fundraising and push it to new heights.

#### Ordering Your Product

Once your students and parents have completed the fundraiser, it's time to place your order. Most fundraising companies provide a master order form that simply needs to be completed and submitted by fax or email.

As part of our continued commitment to our fundraising groups, Australian Fundraising has designed easy to operate accounting software programs for each of our fundraising programs.

The software programs will automatically produce up to seven accounting/reconciliation/auditing reports automatically available at your fingertips; the reports are updated immediately when you enter new details.

#### Paperwork/Orders

Double check your order before you submit it to the fundraising supplier and after you receive any paperwork back from the fundraising company confirming your order. Keep copies of everything in file in case you need to refer to them at a later date.



## Delivery/pick up of Your Fundraising Product

- Determine where the products are to be delivered.
- Work with the supplier on the delivery day. Suppliers can give you an estimate regarding delivery time once your order is placed.
- ALWAYS count the product being delivered to ensure there are no shortages or wrong product delivered. ONLY sign the delivery receipt after you have checked the delivery.
- Advertise/advise students on parade/send home a letter to your families/members who have placed orders advising them when they have to pick up their orders.
- Organise a team of people to assist with the making up of the individual orders. If a supplier gives a time range for delivery, arrange for your people to come at the end of the time range: the supplier may advise a 9-11am delivery. It is best to have your people arrive at 11am rather than 9am in the event the delivery is close to 11am.

## Incentive Prizes

During the course of the fundraiser you may want to put an incentive program together to motivate your students. A combination of team and individual awards tends to work very well. We know that one of the best ways to improve your sales and therefore profits is to offer motivating and rewarding prizes to your participants.

Research indicates that including prizes can increase your sales and profits by as much as 40%. Greater results will be achieved with

the same involvement by your co-ordinator. Australian Fundraising programs include free prizes.

We want you to feel confident that we are doing our best to make your fundraising a great success.

You could also offer a pizza party or fruit party to the class that raises the most or even a free gift to the member that raises the most. These could also be intangible ones such as special privileges. Students and parents are always appreciative if their hard work is recognised!

## Safety in Fundraising

Child safety in fundraising is the absolute top priority when trying to raise funds. That is why we discourage any student/member from selling door-to-door or selling to strangers.

### Fundraising Safety Tips - Do's and Don'ts:

- Always think safety first.
- Make a list of friends, family, relatives, and neighbours to contact instead of selling door-to-door.
- Parents should be involved with their child's fundraising activity.
- Follow any instructions provided.
- Parents should approve anyone the child intends to ask to support the fundraiser.
- Parents can help by taking a brochure to work.
- Never allow children to carry collected money unless they are accompanied by an adult.
- Do not carry large amounts of cash.
- Do not talk to strangers.
- Do not go out after dark.



### **Closing a fundraiser**

Your closing is just as important as your opening because it is what they'll remember next fundraiser or next year.

This is especially important for schools, sport groups and other groups that depend on annual fundraising.

Don't let all that excitement from your opening wear off. Keep it going all the way to the end. Think of the opening and closing ceremonies of the Olympics. These are often the most watched events, and the most inspiring. They sum up what the Olympics are all about. While your opening and closing will certainly not be of Olympic proportions, they should be meaningful and inspiring to your members.

### **How to finish with a bang?**

- Plan a wrap-up assembly.
- Hand out prizes and awards on parade/ special meeting
- Give surprise gifts to top performers. Give tangible or intangible ones like special privileges.

In letters to volunteers, in your newsletter, and your groups website, emphasise what the fundraising will make possible for your group. Be specific. You might say, "Because of the success of the fundraiser, we can now fund new air-conditioners in all classrooms. Include a photo.

Announce dollars earned, top sellers and prize winners. Display details in classrooms or school noticeboards or in newsletters in order to give members a sense of achievement in helping the group reach its goals.

### **Parent Volunteers - Say Thanks**

Parent volunteers feel extra commitment to a project if their contributions are also recognised. A tub of cookie dough, chocolates, flowers, luncheon or even a public thank you can go a long way in helping you to earn repeat help for your next fundraiser.