

FUNDRAISING

- ❖ Fundraising Strategy
- ❖ Successful Fundraising Plan
- ❖ Do's and Don'ts of Fundraising
- ❖ Fundraising Ideas
- ❖ Fund-Raiser Checklist



FUNDRAISING STRATEGY

Developing a successful fund-raising strategy allows student organizations to cover operating expenses, complete projects and programs, and create a small reserve or cushion for the future. Many student organizations find that the success of their fund-raising may be attributed to the following six general principles:

1. **Think Positively**: As you plan for the year, think big; dream little. Ask yourself, "If money were not an issue, what would the group do?" Use your imagination. It is generally easier to scale down your organization's plans than to scale up in mid-year. After you have identified the ideal group activities for the year, you can begin to assess the possibility of achieving these goals in light of available resources. While a dose of realism is necessary at this stage in your thinking, it is important to be positive. Do not permit a lack of available funds to stifle your plans.

2. **Establish Financial Goals**: *If you don't know where you're going, you'll never know if you've arrived.* Organizations must establish an annual budget. First, an organization needs to establish positive, and realistic, goals for the year. The development of a budget should follow the establishment of your organization's goals. A common error, especially characteristic of stifled organizations, is making the group's plan fit the budget instead of making the budget fit the plan. Once a budget of proposed expenses is developed, it must be reviewed against existing resources. The specified dollar amount that exceeds the available resources which will be required to operate and complete the group's program for the year, becomes the group's fund-raising target. If this figure is large, don't panic; it is time to be creative and realistic.

3. **Develop Creative Fund-Raising Alternatives**: Once you have established a financial target, identify all potential sources of funds and develop creative ways to tap these sources. Successful organizations utilize multiple approaches to fundraising.

4. Establish a Fundraising Plan: Fundraising is like any other group project; it cannot happen successfully if left to chance. Successful fundraising requires careful planning. Answer the basic planning questions: *Who? What? When? Where? and Why?* As you creatively explore approaches to fundraising, it is important to balance the costs to the organization (required outlay of time and of human, material, and existing financial resources) with risks involved in fundraising (potential liability and the possible loss of resources or goodwill). If the risks are greater than what the group wishes to assume, it is time to go back and revise the organization's overall goals for the year to reflect a reduced financial base. Remember, think positively and creatively. Once a financial plan is developed, write it down.

5. Follow College Procedures: Many fundraising activities require prior college approval, particularly for sales and solicitation activity. Some activities are restricted or prohibited under the college policy or state law. You should become familiar with both the approval procedure and limitations before you undertake a fundraising activity.

6. Evaluate Fundraising Activities: In order to determine your level of success, maximize learning opportunities and advise future leaders of the organization, it is necessary to evaluate your fundraising activities. This evaluation should go beyond a simple comparison of the dollar goal with the amount raised. It should include a qualitative analysis and conclude with recommendations for future fundraising activities.

Source: Student Organization Development Center
University of Michigan (1999)

Revised: 08/2010 lm

SUCCESSFUL FUNDRAISING PLAN

1. Hold planning meeting for event

What are your organization's needs?

- Costs
- Results from fundraising

Set fundraising goals.

- Make it challenging
- "If you don't know where you are going, you will never know if you have arrived."
- Recognize limitations

Brainstorm

- Share ideas
- Get feedback
- Support each other

Choose fundraiser

- Be creative
- Choose theme and carry it through
- "People come to be entertained and to spend money – provide opportunity to do both."
- Make the project as fun as possible – work together, have fun, and really get to know one another.
- Maximize your efforts – Sell T-shirts at a dance-a-thon.
- Make sure fundraiser is respectable to the organization's purpose.

Appoint enthusiastic fundraising committee(s)

- Food
- Publicity
- Entertainment

Select top-notch chairperson(s)

- Must have the ability to organize and manage, a flair for dealing with people, flexibility, patience, imagination, good judgement, humor, and a cool head.

Consider first

- Result
- Campus / Community needs
- Amount of time, people power, and logistics involved vs. possible funds to be raised
- Public relations value of fundraiser
- Interest /Commitment of members to project
- Appropriateness of fundraiser for organization's purpose / image
- Will this fundraiser help future projects?

Establish a work plan and time schedule

- Stick to it
- Create a list of all tasks needed to be done
- List needs in terms of people, money, and resources.
- Be prepared: a dance marathon takes six months to organize - something more modest will take three months or less.

2. Confer with advisor on plans

3. Check out campus / local / state policies and laws

- Check with Student Activities Office, RSCCD Risk Management, police / fire departments regarding permits, insurance, etc.

4. Determine cost

Include "hidden" costs

- Publicity
- Postage

Determine start-up money needed

Determine break-even point – initial investment?

Re-evaluate goals if necessary – is risk involved worth taking?

Use strict, common sense budget.

Calculate expenses carefully in advance, keep to a minimum with emphasis on donations of services, materials, and merchandise.

The fewer the expenses, the more money you will make.

"Make the budget fit the plan, not the plan fit the budget."

5. Delegate tasks

Get the entire organization involved.

Spread responsibility around. Instead of the treasurer doing all of the work, assign each member a reasonable portion of the total plan.

6. Select date(s) and alternates

Consider academic schedules, campus events, and holidays.

7. Get approval from appropriate offices

If selling items at a game, get clearance from the athletic department. All student activities / events /field trips/fundraisers at Santa Ana College need to be approved through the Student Activities Office (U-121-A).

8. Room /Location selection and alternate(s)

If the event will be held outdoors, be sure to have an indoor facility available, or an alternate date set.

9. Room / Location reservation and set-up confirmed

10. Publicity Planned

- “People who have to be told who you are won’t give” – must have an effective, well planned publicity campaign
- Use leaflets, posters, banners, media, etc.
- Create a positive impression of your organization. Emphasize organization benefits.
- Expect each committee member to actively promote the event.
- Target constituents
- Use all available outlets as fully as possible.
- There is no such thing as too much publicity.

11. Necessary contracts, agreements are in writing and signed by the appropriate individual

12. Publicity Implemented

13. Check up on delegated responsibilities

- Rework if necessary

14. Begin list of necessary equipment and supplies

- Include all equipment, materials, and supplies (including the change and cash box).
- Consider donating more time/person power for service, rather than money as this will cut down on the number of fundraisers.
- Emphasize donations of materials and merchandise from members.

15. Final briefing of committees and members

- All committees/members should know some history of the organization, the number of members, the purpose of the fundraiser, a contact person, co-sponsors of the project, who will benefit from the fundraiser, and whether the fundraiser is new or traditional.

16. Gather all equipment and supplies – check-off list

- Be sure to check off already prepared list and make sure to gather all equipment and supplies after the event.

17. Hold the Event

- Make every display as attractive as possible – even yourselves.
- Follow through on promises, be personable, be prompt, respect people and their time, and show present yourselves with good manners.
- Tell people what their donation will do.
- Give donors something tangible for their donation (i.e. a handmade item, certificate, etc.)
- Use a positive approach in soliciting donations.
- Discounts for students, senior citizens, families, etc. will boost attendance
- Whenever possible, throw in extras/freebies – free beverage, etc.
- Ask for donations, not a fixed amount.

18. After activity clean-up

- Leave the location as it was when you got there – pick up after yourselves. You may want to use the location for future fundraisers.

19. Secure deposit of receipts

- Keep accurate records of money spent and taken in.
- At Santa Ana College, all proceeds and receipts from a fund-raiser are to be submitted to the Office of Student Life within 24 hours of the fundraiser. If the fundraiser falls on a Friday or weekend, then the funds raised and receipts should be submitted to the Student Life Office as soon as possible on Monday morning.
- Money and receipts from fundraisers should be kept in a safe/secure place.

20. Follow up on pledges

- Generally, only 50% of pledges actually pay.

21. Thank you letters

- Letters should be sent to committee members and donors of services, merchandise, and materials.

22. Evaluation of event with committee

- The committee should meet and completely analyze the event.
- Pinpoint weak spots
- Make recommendations for future fundraising
- If something works well, make it a traditional fundraiser.

23. All bills in and paid

- If advertising that a fundraiser is for charity, all money must go to the charity/organization immediately after expenses are paid.

24. Complete a written evaluation of the event – attach this list

- Present the evaluation at your next organization meeting.

25. Plan for next year!

26. Refer to the “Fundraiser Checklist for Student Organizations” (Pgs. 13-14 of this packet).

Source: Student Organization Development Center
University of Michigan (09/1999)
Revised: 07/2011 /LM

DO'S AND DON'TS OF FUNDRAISING

DO'S

- ❖ Do double work – sell t-shirts at a dance marathon.
- ❖ Do donate supplies/services as much as possible.
- ❖ Do keep records of everything you do.
- ❖ Do make the most of every opportunity.
- ❖ Do have a goal.
- ❖ Do your homework on immediate needs and final goals.
- ❖ Do get groups together before and after every event to applaud successes and strategize more difficult cases.
- ❖ Do use thoughtful planning – Too many events are the product of an impulse.
- ❖ Do think positively.
- ❖ Do utilize multiple approaches to fundraising.
- ❖ Do spend as little time as possible on fundraisers – they can really bog a group down.
- ❖ Do give donors something tangible for their donation.
- ❖ Do make successful fundraisers a tradition.
- ❖ Do keep track of those that have supported you in the past.
- ❖ Do watch for opportunities to build on others' efforts.
- ❖ Do be energetic, creative, and enthusiastic.
- ❖ Do **PLAN AHEAD !!**

Source: Dean of Students Office
California State University, Fullerton (9/1999)
Revised: 7/2011 /LM

DO'S AND DON'TS OF FUNDRAISING

DON'TS

- ❖ Don't rely totally on dues.
- ❖ Don't allow funds to be controlled by an adversary.
- ❖ Don't allow fundraising to disrupt the regular business, or programs, of the organization.
- ❖ Don't ask anyone to make a donation because you "need" the money.
- ❖ Don't ask for a fixed price when a donation will do.
- ❖ Don't assume that all pledges will automatically pay – you may have to remind them.
- ❖ Don't expect too much from members-you should have fun and raise money.
- ❖ Don't focus on cash; in kind, or operational support, such as phone usage, typing services, etc. will help minimize expenses.
- ❖ Don't have a fundraiser based on impulse – plan carefully.
- ❖ Don't let the treasurer handle all the responsibility – spread it around.
- ❖ Don't wait until the last minute for anything – be prepared.
- ❖ Don't let one person completely control all the finances – have at least one more person to verify transactions.
- ❖ Don't forget to be creative, enthusiastic, and have fun!

Source: Dean of Students Office
California State University, Fullerton (9/1999)
Revised: 7/2011 /LM

FUNDRAISING IDEAS

Ad Book
Alumni Donations
Antique Show
Art Fair
Art/Poster Sale
Auction
Bagel Sale
Balloon Banquet Delivery
Balloon Sale
Banquets /Roasts
Benefit Dance
Candy Sale
Car Wash
Entertainment Book Sales
Fashion Show Luncheon
Finals Care Package
Flower Sale
Garage/Rummage Sale
Guess Beans in jar (or variation)
Haunted House
Marathons – (i.e. Run; Walk; Jog; Music; Eating; Dance; Board Game; etc.)
Merchant Donations
Plant Sale
Pledges
Recycling Drive
Singing Message
Stationary Bicycle-a-Thon
Stickers / Sales of unusual items with SAC Logo
Student –Faculty Fashion Show
Tournaments (Board Games; Video Games; Pool/Billiards)
TV Show Audience Participant
Used Book Sale

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Source of Original Information:

California State University, Fullerton
Dean of Students Office (1999)

Revised: Student Life Office – Santa Ana College
October 2010 /LM

FUND-RAISER CHECKLIST

FOR STUDENT ORGANIZATIONS

**Date
Initiated**

**Date
Completed**

- | | | | |
|-------|-----|--|-------|
| _____ | 1. | Hold Planning Meeting for Event | _____ |
| _____ | 2. | Discuss plans with advisor. | _____ |
| _____ | 3. | Check out campus / local /state policies and laws. | _____ |
| _____ | 4. | Determine Cost | _____ |
| _____ | 5. | Delegate Tasks Below | _____ |
| _____ | 6. | Select Date(s) and alternatives | _____ |
| _____ | 7. | Submit Paperwork/Get clearance from appropriate offices; Request Check(s) with appropriate advance notice. | _____ |
| _____ | 8. | Reserve Room /Facilities & Alternate (Connected to # 7) | _____ |
| _____ | 9. | Confirm Room /Facilities Reservation & Set-Up | _____ |
| _____ | 10. | Plan Publicity for Event | _____ |
| _____ | 11. | Prepare /Coordinate necessary Contracts and agreements in writing. Complete signatures. | _____ |
| _____ | 12. | Implement Publicity for Event | _____ |
| _____ | 13. | Check up on delegated responsibilities | _____ |
| _____ | 14. | Begin list of necessary equipment & supplies. | _____ |
| _____ | 15. | Final briefing with committees of members. | _____ |

Source: Original Information
 California State University, Fullerton
 Dean of Students Office (1999)
Revised: Student Life Office – Santa Ana College
 October 2010 /LM

FUND-RAISER CHECKLIST FOR STUDENT ORGANIZATION (Cont.)

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|--|-----|--|--|
| | 16. | Gather all equipment and supplies;
Complete check-off list | |
| | 17. | Hold event. | |
| | 18. | After Event/Activity Clean-up | |
| | 19. | Secure Deposit of Receipts /
Deposit proceeds with appropriate
offices. | |
| | 20. | Follow-up on Pledges | |
| | 21. | Thank you letters | |
| | 22. | Evaluation of Event with Committees | |
| | 23. | Review Event Finances –All bills/proceeds
paid and/or submitted. | |
| | 24. | Write Evaluation of Event –
Keep written evaluation
on record for reference. | |
| | 25. | Plan for next year! | |

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Revised: Student Life Office – Santa Ana College
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