

# Fundraising Strategies 101

*A Guide to Help You Achieve Your Fundraising Goals!*

**Presented by-**



*The Freshest Idea In Fundraising!*

Written by  
Dave Strand

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## Introduction

For you folks familiar with my “Fundraising Tips” e-newsletter, this material may sound familiar. **We CARE! Coffee Company** has been around now, for over 6 years. In this time, I’ve worked with literally 100’s of groups across the country. Including; elementary schools, sports leagues/teams, school bands, church groups, service groups, etc... and done my best to learn from each and every fundraiser – from both the successes and the ones that didn’t do so well.

I’ve created this book as a concise guide to help you through the process of assembling a successful fundraising program for your group. I hope it inspires you to combine thoughtful planning, with fun, creative ideas to make your fundraisers not only more enjoyable, but rewarding, as well.

Respectfully,  
Dave Strand  
Co-Owner/ **We CARE! Coffee Company**

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## The Map

“Begin with the end in Mind.” says Stephen Covey, in his book, *The 7 Habits of Highly Successful People*. This is also how you begin creating a successful fundraising strategy. It’s like going on a trip. Right now, you’re creating a map to get you to your goal. But the most detailed, accurate map won’t do you any good, if you don’t have a specific destination in mind.

**Step 1** - Sit down with your group (or group leaders) and decide how much money you’re going to need to raise, to accomplish your group’s goals.

**Step 2** – Decide how many fundraisers you’ll be running this year. How do you do this? I’d suggest using a similar method to the one businesses use to generate their quarterly profit projections. Look at what your group raised last year during each of their fundraisers, and use those amounts as a base. Be sure to work in the number of members (has it increased or decreased?), time of year (fall fundraisers tend to do better than summer), and type of fundraisers (product sales, event, auction, etc..).

**Step 3** – Choose your fundraisers. Invite some friends over, put on a pot of coffee, and brainstorm. Shake it up. Driving is boring if the landscape never changes. Likewise, people get restless, selling products all the time. Product-sales fundraisers can do very well, but limit them to no more than 2 per year, and for goodness’ sake, choose products your group and your supporters can get excited about. Dinner dances, “a-thons” (walk-a-thons, bike-a-thons, etc...) and other event-type fundraisers should all be worked into the mix. Working from last year’s template and the other criteria mentioned before, estimate the profit you’re likely to see with each event. If you’re trying something new, then you’ll have to use your best guess. This is not the time for pie-in-the-sky, best-case-scenario thinking. Be as realistic as you can.

**Step 4** – Evaluate your strategy. If it looks like you’re going to come up short, then take another look at your plan. More fundraisers may bring in more funds, but then again, they may just wear out your team. Now’s the time to either add another fundraiser, scale down your lofty goals, or to adjust your approach to increase your results in these 4 key areas –

- Individual sales volume
- Size of each sale
- Number of customers
- Number of participants

An increase of just 10% in each of these areas will lead to a (better than) 40% overall increase in profit. We’ll cover this later.

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“You are never given a wish without also being given the power to make it true. You may have to work for it, however.”  
- Richard Bach

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## 7 Steps to Launching a Killer Fundraiser

Okay, you've assembled a fundraising strategy for the year. Now, it's time to create a plan for your first fundraiser of the season.

Since I am most familiar with product-sales fundraising, I'll focus, for the most part on that. But the steps are similar for most any fundraiser you're likely to run.

Here's a list of basic jobs that will have to be accomplished;

1. **Create a Timeline**
2. **Assemble your staff**
3. **Line-up incentive prizes**
4. **Fundraiser Launch**
5. **Promotion**
6. **Order form collection**
7. **Product distribution**
8. **De-Brief**

### 1<sup>st</sup> Step, Create a Timeline.

As before, start at the end. Use these questions as your guide (This assumes you'll be running an order-form type fundraiser).

- On what date would you like to distribute product? Work backwards from this date.
- In order to pass out products on this date, by when should you collect order forms? (Be sure to check with your fundraising vendor for this information.)
- Giving yourself a couple of days to assemble the orders, and total the proceeds, when should you collect the order forms from your participants?
- Assuming you would like your participants to circulate the order forms for 10 days – 2 weeks, when should you launch?
- Schedule a final party to award prizes, and celebrate your victory

### 2<sup>nd</sup> Step, Assemble Your Staff

You can approach this one of two ways. Either ask for volunteers at a meeting, or pick up the phone, and call the people you think would be well-qualified for the tasks listed above. I like this 2<sup>nd</sup> method, because it means you get to hand-pick your team. Also, a specific request for help is a lot harder to refuse than a general one.

### 3<sup>rd</sup> Step, Line-up Incentive Prizes.

Check with your fundraising vendor. Do they supply appropriate incentive gifts? If not, or if you'd like to add to their offering, then start calling local businesses early, if you're hoping to ask them about contributing prizes to your fundraiser. You'll be more successful if you approach business where you're already a patron. Let them know how you'll promote their business in your newsletter, website, etc...Business are approached all the time to donate items and services to local charities, so be sure they know how appreciative you are for their support. Likewise, if the answer is no, don't take it personally. Saying no is harder than hearing it, especially for someone who would really like to contribute, but can't.

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#### **4<sup>th</sup> Step, Promotion**

Did you know that your local paper keeps a reporter on staff to cover nonprofits and charities? Call the paper, get his name, and then, either describe your fundraiser over the phone, or email a press release. Either should be fine. But the press release will have your facts spelled out correctly. Be sure to include a contact name and number to be inserted in the article.

If your group sends out a newsletter, what date should you turn in your article promoting the upcoming fundraiser? In the article, be sure to communicate the goal you're shooting for, the purpose for which the money will be raised, and the reason this is important enough to contribute to.

Also included in your schedule should be reminders to go out to your group during the fundraiser; Use email, phone tree, snail mail, bull-horn, classroom loudspeaker, whatever. Be sure to remind them of the reason they're raising money, and what prizes they can win.

#### **5<sup>th</sup> Step, Order Form Collection**

No big deal here. Make a big deal out of this date, especially with young students. Just be sure to have a way to pick up late orders as well.

#### **6<sup>th</sup> Step, Product Distribution**

Make sure all the participants – and their parents – know when this will happen. If you're selling perishable products like cookie dough, then have a large freezer/refrigerator available to hold product that wasn't picked up for one reason or another.

#### **7<sup>th</sup> Step, Debrief**

Discuss the fundraiser in detail with your team. What went well, what were the weak points? *More on this, later.*

In the midst of all this, schedule meetings with your staff, to keep everyone updated on your progress. Don't take anything for granted. If one of your staff members needs help, then be there to offer it to them, or line up someone else who can. The final meeting should be a de-brief to discuss what worked, what didn't, what could've been done better, ideas for next time. Then break out the bubbly (champagne or sparkling cider – whichever you prefer!) and celebrate all you've accomplished together.

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“Failures don't plan to fail; they fail to plan.”  
- Harvey Mackay

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### Take it to the Next Level

Here's the scenario for most school product fundraisers.

1. Launch Day – fundraising brochures, order forms, catalogs (whatever) are passed out to the students, and they're told what day they need to come back in. Hopefully, they're also told not to sell door to door, because of safety issues (It's also a waste of time, but I'll get to that.)
2. Collection Day – Some students hand their orders back in.
3. The Day After Collection Day – A couple more order forms come in. Orders are tallied, and then sent on to the fundraising Vendor.
4. Distribution Day – Product is delivered, sorted, handed out to students. Done.

In every step here, missed opportunities are screaming for attention.

**Launch Day** – This should be a big deal, and should not be done by the teacher. Why? Well, with a few exceptions (some coaches and band directors, for example.), teachers aren't usually effective in generating excitement in the students. Your fundraising vendor should provide a representative to launch it with the kids. Included should be sales advice, an explanation of the products, and appropriate incentives. The teachers, Principal, coaches should all be there, to lend their enthusiasm, fill in any gaps (Why are we raising money?) and show that they are behind this fundraiser 100%. The students should be encouraged to pick up the phone, and call 5 – 10 friends or family members (If they're old enough. Otherwise, their parents should make the calls.). They should say that they're that group is holding a fundraiser, and ask if they'd like to support their group by purchasing a few products. The students should also be encouraged to ask their parents to circulate the order forms at work.

*I mentioned earlier that door-to-door sales are dangerous, and a waste of time. The former is obvious. But, why a waste of time? First of all, it's intrusive. In addition, it's usually hard to tell if someone's even home. Also, because we're living in what seems like increasingly suspicious times, even children selling products for an apparently worthwhile cause are not always trusted. It's far faster, and more efficient, to call people you know, first and then bring the order form to them. Still, be sure to accompany your children when they visit other people's houses.*

**The Lost Days** – Between the opening and closing of sales, there is an immense opportunity to increase participation. Remember, the best products in the world won't sell if the kids keep the brochures in their backpacks. Teachers should check in every couple of days, to see how it's going. "Everyone who's sold 5 or items, raise your hand. Now 10 items. 20 items. Okay good. Tommy, sounds like you're doing really well. How have you sold so much? How did you get people to buy? How many of you have asked your parents to take the order forms to work?" In addition, students may have questions, but if the teachers don't give them the opportunity, they probably won't ask.

*Now, the trick is to get the teachers' support for this. How? Use your imagination. For instance, give every class that reaches 100% participation a set of playground balls, or*

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*come up with something else that's not too expensive, but that the teachers will get behind.*

Make sure your parents know about it. Sure, you inserted a heads-up article in the school bulletin, but how long ago was that? Sometimes parents need to be reminded about what's going on. How? Phone trees work well. Email lists can be effective too, as long as your message isn't thrown into the junk by an overzealous spam filter.

### **Collection Day –**

1<sup>st</sup>; *I'm repeating myself here.* Advertise it. Make sure – especially if you're selling cookie dough or other perishable food item – that your parents know when to expect the order.

2<sup>nd</sup>; Get help. If your fundraising vendor doesn't presort, then get a crew together to help you put the orders together. Many organized hands make light work. Have all the orders consolidated in a single area, and then make an announcement just before the bell, to let kids know where to pick up.

*Accept late orders. If your vendor won't accept them, then find a vendor who will. Don't turn away money, just because it didn't come in on time.*

### **Post Game – The De-brief**

Once you've completed the fundraiser, deposited the money, paid the vendor, and distributed the products – take a moment, sit down, and analyze how things went.

If you were successful, why..? What worked? What didn't? What could you improve on next time? What would you do over again, and what was a waste of time?

I'll share a simple calculation with you. Would you like to increase your next fundraiser's profit by 30%? Simply do the following;

- Improve your participation by 10%
- Increase the number of each student's sales by 10%
- Increase each purchase by 10%

Broken down this way, it doesn't seem so daunting. One key step to reaching this goal (30% increase) is to learn and improve on your results from the fundraiser you're wrapping up. Ask yourself how you could successfully increase the participation? Would it be more appropriate prize incentives? Could you more clearly communicate the need? Can you add a consequence for not participating? Should you? Ask similar questions about the other 2 points.

*Consider organizing the students into teams, and each team elects a team leader. This can work well with bands, where section leaders are already in place. Leaders will be responsible for reporting to the teacher (or fundraising coordinator) how much they've earned so far. This putting peer pressure to a positive purpose!*

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**Bonus Points**

Want to go down in history as the person who created an amazing fundraising dynasty? Then do this. Keep a journal. Document every thing you do for this event. Insert dates, contact numbers (local business, fundraising vendor, etc...) and then include your **Post Game De-brief** analysis.

This way, future fundraising coordinators won't have to start from scratch. They'll be able to refer to your journal before they take their first step – take advantage of your experience, and avoid your mistakes. Make sure there's room for them to insert they're own journal, and you've begun a fundraising dynamo capable of learning from the successes and failures of the past.

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“Fortune favors the bold.”  
-Virgil

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## Smorgesborg

I wanted to include a few ideas that I've either heard from clients, or have come up with myself. Some of these may work well for your situation. If not, then I hope they'll at least get your juices flowing and help you come up with your own unique ideas.

1. Make \$\$ not war – At one school I've worked with, the different classes in the Performing Arts Dept, have always competed for their fundraising dollars. When the new Band director started, she wanted to put on a Dinner Dance featuring her jazz band. Great idea – trouble was, the Drama Dept. traditionally put on a Dinner Theater, and the instructor was afraid that the Jazz Band's events would pull revenue away from her event.

My client had a gift for negotiation, and came up with a solution that benefited both programs. She proposed that they pool their resources and put on both events at different times of the year. The band played back up for the Dinner theater night, and waited tables. While the Drama kids helped out with the Dinner Dance. The result? A resounding success. Because both events featured kids from both programs, their events pulled in parents to support both. In other words, the band parents attended the dinner theater to hear their kids perform, and likewise, the drama parents attended the Dinner Dance for like reason. Both events did better than the one ever had.

2. If your group decides to host some kind of dinner event, be sure to raise as much \$\$ as you can for your hard work.
  - i. Pre-sell tickets, so the food, venue, etc... is paid for before you even start. Be sure you purchase enough food, so you can also accept late-comers who want to pay at the door.
  - ii. Hold a drawing that night. Participants can win an item (donated to your group), or do a 50/50 drawing, where the winner of the drawing keeps 50% of your drawing ticket sales. Some generous types may even donate their winnings.
  - iii. Take requests. Print out a list of songs your band or singers can perform, then for a donation, offer to perform a tune requested. Be sure to give an introduction, such as: "This request comes from Mr. Smith. He dedicates this to Alma, his wife of 25 years." Or something like that.
  - iv. Put out a donation box out.
  - v. At the dinner, explain not just what needs to be raised, but what the wish list is. "We'd love to, in the future, buy new uniforms and instruments, and ultimately, take the kids on a trip to Europe", for example.
3. Don't underestimate the power of the press. As you launch your fundraiser, send an email to the reporter covering your "beat", detailing what your group contributes to the community, what your fundraiser is, and what your hopes are for the future.
4. Heck, send the same email to your local TV. News stations.

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5. Radio and TV stations have to devote a number of minutes each month to support the community. See if they are willing to tape a “PSA” (Public Service Announcement) talking about your group and your fundraiser.
6. “...-a-thons” require a lot of planning, but can be extremely effective. One of my clients raised over \$60,000.00 for his group with one bike-a-thon. Here are some other variations; dance-a-thon, wake-a-thon (members spend the night in an auditorium or church, and stay awake for the night), walk-a-thon, hit-a-thon, sing-a-thon, etc... Use your imagination, and come up with your own idea.
7. Loose change collection. I’ve seen this do wonders as well. Each class collects loose change from the students. Put simple thermometer-posters up on the classroom walls that track progress, against their goal. Great thing about this program? 100% profit!

Don’t limit your ideas to what’s been done before. Using imagination, drive, and planning, your group should be able to raise all the funds it needs, and then focus on its core mission.

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I sincerely hope you enjoyed reading this ebook, and found it helpful. I plan to take full advantage of the fact that this is a digital document, and periodically update it with new information, and ideas. Feel free to check back, and download, as it evolves.

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*“Inspiration comes from doing.”*  
-Dave Strand

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