

Catalog Fundraising Checklist

Step One – Proper Planning

Fundraising Checklist (overview)

Whatever type of fundraiser you are running or hosting it is vital that you have a checklist before you begin. Creating a comprehensive checklist is the most important step you will take in the process. If you have questions or concerns please call our office at 1(800) 645-6550 between 9:00 - 5:00 EST, Monday through Friday and we will assist you to the best of our ability.

Design a Leadership and Management Plan

Set up a Leadership Group. Even though you may be a small group, such as church youth group, debate team, math club, 4H group, FBLA group or other type of fundraising group that is on the small side, that is not a reason not to set up a properly coordinated leadership team - even if it is one person.

Recruit Volunteers. Before you formally begin the fundraising plan it is important to recruit volunteers, especially if your group is on the large side, such as an elementary school, school band, large sports league, etc. Having volunteers is very important and it makes things easier for the leadership group. Volunteers also come in handy during the distribution process.

Create Attainable Goals and Objectives. When you sit down and put pen to paper it is important that you create financial goals that are reasonable.

Get Proper Authorization. Again, proper planning prevents poor performance. Whether you are with a school group, parent-teacher association, daycare center, whatever type of group, chances are you will need to get authorization to run the fundraiser. So make sure to reach out to the right person and get it in writing.

Develop a Plan. When you are setting up your fundraiser, make sure that you do not forget the obvious - which is "Create a Plan". The plan does not have to be in stone, but like a budget, it is better to have one than not have one.

Decide who does What. In setting up the decision making leadership group, make sure you then set out a plan on who will be responsible for what. Such things need to be spelled out.

How will you Market the Fundraiser. In running a brochure fundraiser from us, it is important that you decide how you want to market the program. This is fairly simple as we take care most of it for you. We have the online email program and the text fundraising option. On your own, you can set up a flyer to send out or you can send a special email to all possible clients or if you are in a school you can make announcements on the school PA system.

Create Social Media Buzz. These days, you can hardly do anything without having social media involved in some way or the other. We strongly urge you to take advantage of the benefits of social media by posting on Facebook, tweeting, going on Snapchat, posting pics on Instagram, etc - it is easy to do and it works.

Contact Alumni. One of the best sources for people who want to help are those who were previously involved with your group - and that would be alumni. This group of people are especially helpful for elementary schools and sports teams.

Brochure Fundraising Checklist. This is the actual actions you will follow in running your catalog fundraiser with us. If you have questions please call us at 800.645.6550 - thank you.

Step Two - How it Works

CHECK SUPPLIES. Count up the amount of brochures, collection envelopes and prize program brochures (if applicable) that are in the box(s) you have received to make sure they are all there. Please do this immediately.

FILL IN DATES. Use the space provided on the collection envelopes and fill in the date you want the order and money returned to you (sponsor) from the participants. The fundraiser should run for no more than two weeks.

PRIZE PROGRAM. If you chose a "Prize Program" please make sure the participants / parents are aware of it and that they receive one with their packet.

LATE ORDERS. After the fundraiser is complete (if time allows) please allow two to three days after your "final return date" for late orders to come in. We do not accept "add-on" orders after we receive your forms.

SEND IN ORDER FORMS. On collection day please make sure that the amount of money in each envelope correctly matches the item values ordered. If you have a generic order form please mail back the "white copy". If your brochure has its own order form then please detach the bottom portion but make sure that all participants names are clearly written and that all totals are carried down accurately. Mail all totals to:

Tracy Hamilton Inc.

Fundraisingzone.com

337 Merrick Road, Suite 5

Lynbrook, New York, 11563

REMITTANCE. Do not send cash or checks with your order (unless instructed to). After we receive your order we will run a "variance" report, which will find most errors. When that is complete you will be advised of your exact profit and amount to be remitted.

FINAL STEP. After you receive your order, which is generally within two to three weeks after we process it we strongly urge you to inspect that the entire shipment has been received in good order. Additionally, please wait one week for participants / parents to report missing or damaged merchandise at which time you can fill out the enclosed "Missing / Damaged Merchandise Claim Form" and fax it to us at: 516.764.4530

Please call 800.645.6550 with any questions – thank you.