

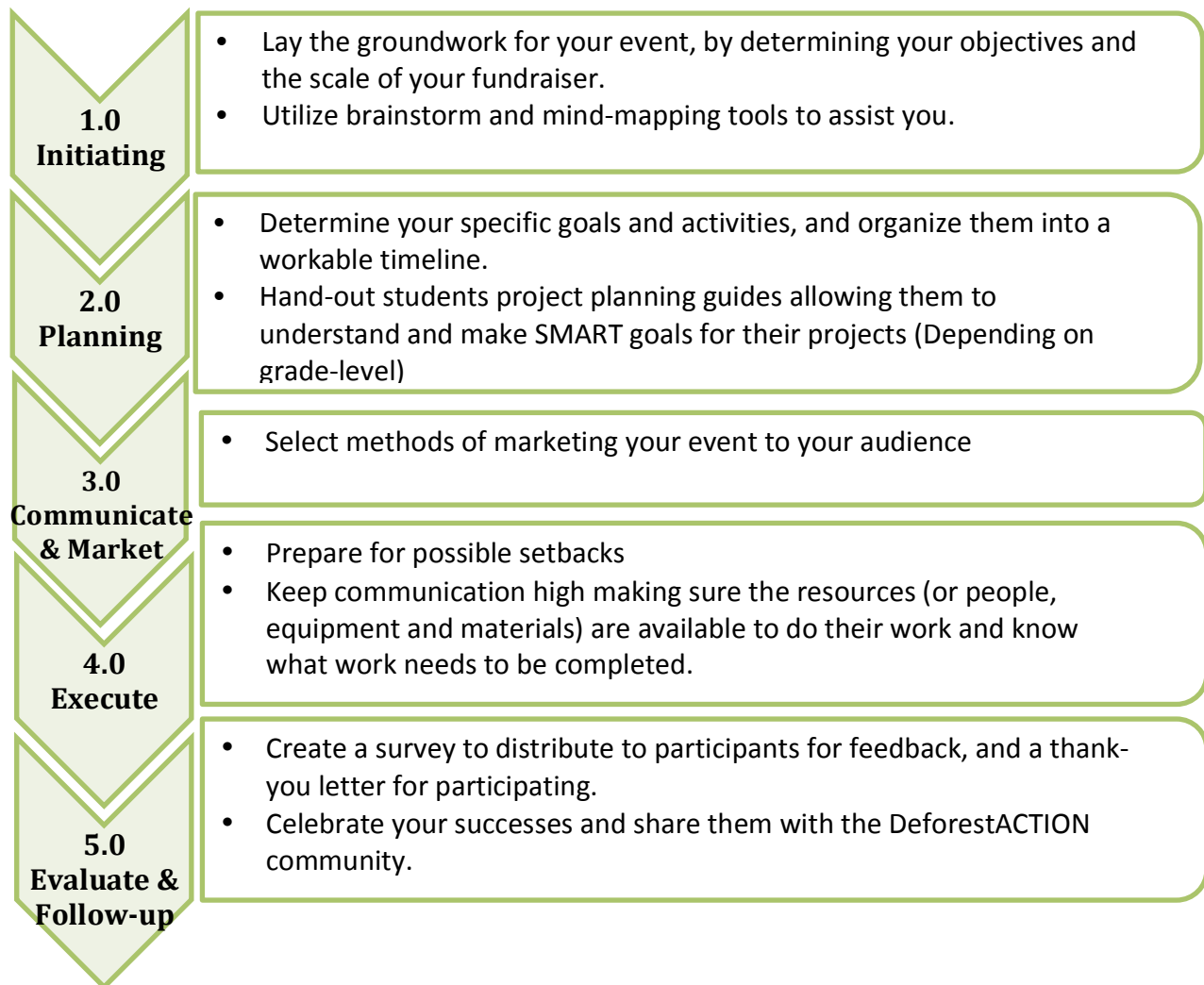
# GUIDE: How to Plan a Fundraiser

Fundraisers are fun ways to raise awareness about specific issues while at the same time enabling your students and school community to make a difference. The purpose of this guide is to provide you with guidelines and best practices that can be followed to assist your students in executing their own fundraising event.

If your students are in an upper level grade, download the **Project Planning Guide for Students** in our [Resource Section](http://dfa.tigweb.org/schools/?section=resources): <http://dfa.tigweb.org/schools/?section=resources> and have the students take on the role of project managers, team leaders and members, and lead the planning, executing, and management of the event.

## Life-cycle Steps

First let us begin with an overview of the basic step process you can follow showing the complete lifecycle of a fundraising event.



## 1.0 Initiating

It is good practice to lay some groundwork for a fundraising event or project before it officially starts and you begin detailed planning. This groundwork will help to ensure your fundraiser has a clear objective and message.

Firstly, it is important to clarify:

- Your objectives - what do you want to achieve with this fundraiser?
- Who is your audience and to what age group do you want to deliver your message to?
- What kind of impact or message do you want to communicate to the participants and audience?

By answering these questions you clarify some boundaries of your fundraiser and develop your vision.

Secondly,

- Pick a theme:
  - Choose a theme for your fundraiser that will represent your cause, and plan your fundraiser details around this theme and message you clarified in the above section. Have your communication materials also reflect the theme of your event to ensure a strong, consistent message your audience will remember.
- Determine a budget:
  - Estimating your budget early will help your team determine which activities, entertainment and promotional avenues you are limited to. To stretch your budget, seek out vendors in your area if they would be willing to donate food, raffle prizes or other items for your fundraiser.

## 2.0 Planning

In the planning phase your team will devise and maintain a workable scheme to ensure that the fundraiser meets your objectives and goals.

In this phase you and your team will brainstorm the content of your fundraiser and how you are going to deliver your message. Whatever your theme is, it is important to plan your entertainment or activities that tie into that theme.

In this phase your team will have to decide on:

a) Timeline:

- When picking a date for the event, make sure you have left enough time to organize and promote the event. The more you plan the better the outcome of your fundraiser!



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- Consider external factors as well, such as: national holidays, weather, other local or national events. If you are involving your schoolmates, or holding it on school property, make sure to discuss the date with the Principal or any other higher authority before you come to a decision.
- b) Activities, tasks and entertainment:
- While working within your budget determine what activities you would like to organize for your event.
  - Make sure the activities fit within the theme and message of your fundraiser and that you have the capacity, the necessary number of team members, time, and budget to organize and to carry out the tasks.
- d) Success criteria:
- It is important to outline the desired outcomes and achievements of your fundraiser or achievements. This will help your team stay focused on achieving your overarching goals as well as their individual responsibilities.
- e) Roles and responsibilities of team members:
- Decide on clear roles and responsibilities for all team members and participants involved in the fundraiser event.
- f) Choose a location for your event:
- Make sure to obtain proper authority and that the location is easily accessible.

### Best Practice

**a)** When developing your plan and goals of your fundraiser, it is very important to make SMART Goals - a goal setting process to help your event achieve its desired objectives.

#### SMART Goals

**S - Specific;** The goals are clear and unambiguous by explaining what is expected, why it is important, and who is involved.

**M - Measurable;** Measurable progress and measurable end goals will help your team and students stay on track, reach targets, and experience the exhilaration of achieving the goal. Think of answers to the questions: How much? How many? How will I know when it is accomplished?

**A - Attainable;** Set goals high, but make sure they are not out of reach. If you set your goals high yet attainable team members develop the skills and capacity to bring themselves closer to the achievement of these goals. Make sure that you set the goals with your team members and students involved so that they can personally connect, and feel accountable to reaching the goals.

**R - Relevant;** Make sure your goals are relevant to your cause and message. Ask questions like: Does this seem worthwhile? Is this the right time? Does this match our efforts and needs?

**T - Timely;** A time-bound goal establishes sense of urgency and ensures your fundraiser stays on track.

**b)** When planning and creating a timeline it is important to consider all the tasks that you and your students will need to complete. One method to creating a timeline is to list all the larger tasks you will need to complete for your event, and then brainstorm smaller sub-tasks needed to complete each larger activity.

*Example:*

Task: 2.0 Book entertainment:

2.1 Make sure there is entertainment space in your venue

2.2 Choose a group/presenter

2.2.1 Research local groups with a possible environmental interest


2.2.2 Contact the group/person and submit a proposal for them presenting at your fundraiser event

2.2.3 Create proposal with suggested dates for the event

2.3 Negotiate contract

After this is done for all tasks, assign a time-budget for each subtask - either days, weeks, or months whichever is more appropriate for your event.

This will help you gain a better idea of all the work involved in completing tasks and hopefully make sure you do not underestimate time frames. For additional template and organizational ideas please see *Appendix 6.0.b and 6.0.c*.

 Try using Microsoft Excel to create a timeline in a few simple clips (example here: <http://www.youtube.com/watch?v=qoKi6VeIRHQ> )

### **3.0 Communication / Marketing**

Now that you have your date and your fundraiser content planned, it is important that you spread the word about your event. The more people who know about it, the more likely it will be a success. The earlier you advertise and get the word out about your fundraiser, the better.

It is also important to keep communicating to all team members ensuring they are aware of their roles and responsibilities. Events work best when everyone knows what's going on and what to do. Let people know as far in advance as possible so that they can get organized. It's also important to make sure that people understand what will happen during the event and how they can take part, so keep it simple.

Advertising methods students and educators have utilized in the past:

- Developing flyers
- Create artwork posters
- Send invitations home with students
- Local newspapers
- Social media pages of schools or students (facebook, twitter, instagram, etc)

Audiences you may wish to reach with your fundraiser event:

- School boards
- Students from other classes or neighbouring schools
- Parents
- Educators
- Your local government or local media

## 4.0 Executing your Fundraiser

Before the event:

Have a meeting with the team before you start the preparation for the event the day of. In this meeting thank everyone for their hard work and congratulate them. Take the time to ensure that everyone understands their role on the day of the event, and that you have set up all the necessary resources to run your fundraiser.

During the event:

Present your cause. With all of your planning for the fundraiser, it's easy to forget why you are inviting these people here in the first place. Prepare a short presentation about your cause, showing everyone why you are raising funds and how they can help.

Don't forget to prepare yourself for possible organized chaos! No matter how prepared you are, running a fundraiser can still be stressful and busy.

**Best Practices** to help your fundraiser run smoothly:

- Have concise answers ready for questions from people, whether its staff, parents or members of the public that you think you are likely to get asked
- Develop a schedule for the event and communicate it clearly to everyone involved
- Make sure you have designated everyone involved a clear task and role, and communicate expectations, what they need to bring, what they will be doing, etc.
- Make sure you arrive early to set up
- Stay calm! Be prepared to change the plan according to the day

## 5.0 Follow up and Evaluate

Evaluation provides an opportunity to reflect and learn from what you've done, to assess the outcomes and effectiveness, and to think about new ways of engaging your audience diverse needs. Key to a fundraising event is the follow-up of the event afterwards.

If you collect email addresses at your event, you can send an electronic survey to collect participants' impressions and get feedback. There are a lot of websites that allow you to create surveys free of charge. Some great ones include:

[www.surveymonkey.com](http://www.surveymonkey.com)

[www.micropoll.com](http://www.micropoll.com)

In the survey introduction, or follow-up letter, remember to express your gratitude and thanks to the participants for attending and supporting your cause. In this message also reiterated your key messages and communicate the outcomes of the fundraiser (what was, or can now be achieved through the event), and highlight your big successes! This will make sure it stays a positive memory for participants and team members!

✚ Please see the appendix for a sample follow-up email template

Aside from evaluating your project from participant feedback, it is important to celebrate the success and completion of your student's projects and initiatives as well. Taking time to reflect on your student's successes will help bring a feeling of accomplishment, and fulfillment.

Remember to share your initiatives and successes with the DeforestACTION community! You can share your fundraiser event with the online community by posting your story, photos, and videos in our [Collaboration Centre](#), or on the Action Hub your school automatically receives when you sign-up for DeforestACTION. You may also e-mail the DeforestACTION team, and have them assist you in highlighting your story at [deforestaction@takingitglobal.org](mailto:deforestaction@takingitglobal.org)

## 6.0 Appendix

### 6.0.a. Online Tools for Assistance

Below are a few websites that are useful in helping you make pro forma's to further assist you in your planning.

#### Brainstorming Tool:

To brainstorm initiatives you would like to take and partake in.

[www.scriblink.com](http://www.scriblink.com)

[bubbl.us](http://bubbl.us) (mindmapping)

[www.todaysmeet.com](http://www.todaysmeet.com)

#### Timeline Tool:

For both students and educators to help plan their actions. [www.preceden.com](http://www.preceden.com)

#### Reflection Tasks:

[www.exploreatree.org.uk](http://www.exploreatree.org.uk)

[www.gliffy.com](http://www.gliffy.com)

#### Surveys for evaluation and reflections

[www.surveymonkey.com](http://www.surveymonkey.com)

[www.micropoll.com](http://www.micropoll.com)

### 6.0.b. Sample Follow-up Letter

Dear \_\_\_\_\_,

We would like to extend our gratitude to you for helping us make our (insert name of event here) event a great success. We hope you had an unforgettable time, full of great experiences and gaining knowledge of the global issue of deforestation.

Due to your gracious support we were able to \_\_\_\_ (highlight your success here eg: raise XX dollars, or reach and educate XXX of people), which is going towards supporting (enter the cause of your event here, eg: the plant-a-tree day at our highschool, or supporting a reforestation effort in Indonesia).

We would like to thank-you again for showing your interest and support to our cause, and because of you, (insert the overall success of event eg: 500 trees will now be planted in a deforested area of our city making it more beautiful and a better sustainable environment).

Please visit our school Action Hub (insert link) to see photos and video of the event, or would like to support our cause further.

The trees and orangutans thank-you,

Sincerely,

\_\_\_\_\_ school and students.

**6.0.c. Time-line template example: DeforestACTION Day**

<b>SMART GOALS</b>	<b>Steps needed to achieve your goal</b>	<b>How will you accomplish this?</b>	<b>Resources</b>	<b>Responsible</b>	<b>Estimated Time frame</b>
Host a Deforest-ACTION day at our school, raising awareness of deforestation and promote ways to reduce our ecological footprint!	1) Receive the support and an available date from school administration	May need support of educator who will oversee event.  Formal plan & proposal highlighting the educational benefits of this event.	An educator with available time to supervise  Formal proposal and plan	Mr. Smith  - All of Mr. Smith's homeroom students to develop event plan - Maria + Francis to develop proposal	2 weeks to develop plan + proposal  2 weeks for school to approve
	2) Find engaging ways to educate our schoolmates	Market stalls	Educational resources for display, and display materials	Trevor Aliya Ying	4 weeks to develop all educational materials (2hrs/week)
		An online event with Eco-Warriors or other youth to kick-off the event	Technical capabilities, and either a. an Eco-warrior, or b. a school from another country who is involved in Deforest-ACTION	Sarah Nadim Michael	3 weeks to reach-out and coordinate an online event





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### 6.0.d. Time-line template

SMART Goals	Steps needed to achieve your goal	How will you accomplish this?	Resources	Responsible	Estimated Time frame