

VENTURA COUNTY OFFICE OF EDUCATION
FUNDRAISING TOOLKIT

Fundraising Toolkit



VENTURA COUNTY OFFICE OF EDUCATION

Fundraising Toolkit

Ventura County Office of Education

John E. Tarkany

5189 Verdugo Way

Camarillo, CA 93012

Office: (805) 437-1501 • Cell: (805) 760-8674 • Fax: (805) 437-1503

jtarkany@vcoe.org • www.vcoe.org/sc

Special thanks to the Constitutional Rights Foundation as well as Larry Jones, former Moorpark High School Academic Decathlon Coach, with 4 National Championship Academic Decathlon Teams



Welcome to the Ventura County Office of Education, Student Competitions and Fundraising Department

Participating in an extracurricular activity is tough enough without adding the extra complexity of fundraising.

The purpose of this Fundraising Toolkit is to provide parents, educators, students and teams with some basic tools to help with fundraising.

The Bad News, there is no Silver Bullet to make fundraising easy, sorry.

The Good News, this Fundraising Toolkit, combined with your initiative and hard work, will help provide the basic tools necessary for you to begin your fundraising efforts.

On behalf of my office, I thank you for your participation and hard work. Wish you good luck! And look forward to many fun, successful, and educational events together.

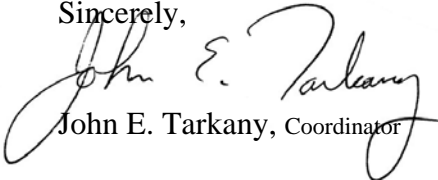
Sincerely,

John E. Tarkany, Coordinator

Table of Contents:

Getting Started:5

First Steps:5

Who and How Should I ask for Contributions?.....5

What Do I Need?5

General Tips:.....6

Telephone Tips:6

Letter Writing Tips:6

What Else Can I Do?.....7

Sample Letter of Request:.....8

Sample Thank You Letter:.....9

Sample Follow Up Letter:.....10

Sample Information Sheet:11

Getting Started:

- Identify a person or group of persons to lead and coordinate fundraising activities. Parents are a great resource as they are often looking for meaningful ways to support their students, give them this Fundraising Toolkit.
- Determine Your Needs and Set a clear goal to meet those needs (include wants, but they are secondary).
- Define your potential sponsors, make a list with contact information (ask parents to suggest potential sponsors) and do a little research on each.
- Make your requests, personalize them.
- Host activities to raise funds.
- Thank your sponsors.

First Steps:

- Prepare a budget, list every item you will need along with its cost (expense) and when you will need it.
- Determine how much financial, and what in-kind resources you will need to get the items listed in your budget:
 - Study Materials (financial)
 - Fees (financial)
 - Food/water (in-kind)
 - Facilities (in-kind)
 - Volunteers/Advisers/Experts (in-kind)
- Determine what funds and/or resources are available to you and list them as revenue or income (note whether it is financial or in-kind).
 - Are there any school funds or resources available?
 - What can parents/family contribute?
- Establish a timetable: Start with the date of your event and work backward. Be sure to include any spending deadlines in your timeline.

Who and How Should I Ask for Contributions?

- Ask parents to help put together a list of local businesses and organizations that are a good match for what you are doing.
- Approach locally owned businesses.
 - Be prepared with a personalized letter and a single sheet (see sample information sheet), 2-sided is fine, with all of the event details, information, and the financial and in-kind resources you are looking for.
 - Be prepared to answer questions about why you want the business or organization to sponsor you.
 - Speak with the person who makes the decisions!
- Check with Community groups.
 - Kiwanis, Rotary, Lions, Knights of Columbus, church/temple groups, etc.
- See if your parents' place of employment offers any programs that help pay for fundraising. Some employers offer a "matching gift" program. The employer will match the parents' donation.
- Check for In-kind support, food, water, materials, volunteers.
 - Newspaper, radio and Television may let you run sponsor thank you ads for free.
 - Many businesses and organizations may have materials, skills or knowledge that would be helpful.

What do I Need?

- A Ledger to record:
 - Who you will approach.
 - Who you have approached.
 - How and when they were approached (letter, phone call, in person).
 - Results of the approach.
 - Who has donated?
 - What was donated?
 - Has the donation been received?
 - What follow up has occurred?
 - What follow up is still necessary?
- Letters (see samples):
 - Letter of Request
 - Thank you letter
 - Follow up letter
- Information Sheet (see sample)
- Confidence! Be prepared to make a quick presentation describing your event or activity.
 - Explain why attending the local, state or National event or activity is important to you and to the community.
 - Explain how the contribution will be used.
 - Explain how the support will be recognized:
 - Local newspaper/radio
 - School newspaper/bulletin/yearbook
 - Certificate/Letter of thanks

General Tips:

- When calling or writing a letter, always get the person's name and correct spelling. When leaving a message on voice mail, clearly state your name and phone number as well as the reason for your call, speak slowly.
- Be prepared with information:
 - When/where is the event or activity?
 - How much does it cost/how much money do you need?
 - What other resources are you looking for?
 - How will you benefit from participating in the event or activity?
 - How does the sponsor and/or community benefit from this event or activity?
- Speak with as many people as you can about raising funds or securing resources:
 - Parents
 - Family
 - Friends
 - Fellow Students
 - Educators
 - Business owners
 - Community groups
 - Church/Religious leaders
- Use parents, telephone book and the internet; they are great resources to research potential sponsors!
- Invite your sponsor to attend the event or activity.
- When the event or activity is completed, visit your sponsors, or host a sponsor appreciation night so that you can thank them, show them photos from the event or activity and let them share in the experience.
- Don't forget to honor all commitments to your sponsors!

Telephone Tips:

- Before making calls, be sure that you are in a good frame of mind, if you are irritated or angry, it will come through in the conversation. If you are happy and feeling good, that will also show.
- Have all of your information in front of you.
- Have pen and paper handy.
- Have a clear idea of what you are asking for and why it is needed.
- Don't worry about rejection. The worst that will happen is that they will not be able to help you at this time.
- Find a quiet place and time to call. Consider whether or not it is a good time for the person you are calling; you wouldn't want to call a restaurant during dinner time, would you?
- Know who you want to speak to, if you don't have a name ask for a Manager or Owner.
- Always get the person's name, write it down along with the date and time.
- Introduce yourself, speak slowly and mention who and what you are representing.
- Ask if the person has a couple of minutes to speak with you. If not, ask for an appropriate time to call back.
- State the reason for your call. Be brief and to the point; Take notes; Listen carefully.
- Ask if they have any questions.
- Find out when they would like a follow up call or visit.
- Thank them for their time and consideration.

Letter Writing Tips:

- Make sure the name and address are spelled correctly.
- Be sure the salutation and title are correct.
- Make the letter informative and to the point.
 - A brief description of the event or activity (include location, date and time).
 - Why participation in this event or activity is important to you.
 - Why it is important to the potential sponsor and community.
 - What resources are you looking for?
 - Be sure to include your contact information:
 - Name
 - Address
 - Phone/Fax
 - E-mail
 - Web Site with more information (if available)
- Use your school's letterhead if possible.
- Use your schools Tax Payer ID# or District NCES ID# if possible (so the sponsor can use it for their tax filing)
- Make a follow-up call (about 1 week after mailing) to make sure the person received the letter and to see if they have any questions or concerns that you may address.

What Else Can I Do?

Forget the Odd Jobs, Product Sales, Car Washes and Bake Sales. Do what you do best, do what you are preparing for. People want to see you in action, provide them with the opportunity. Host an event where they can come watch you perform, for a small suggested donation of course!

By doing this you are reinforcing your training and getting comfortable performing in front of an audience. In addition, the people that come to watch you will feel more connected to the event or activity that you are preparing for and will also form a relationship with you and/or your team.

Remember, you will not only receive donations during this 'show and tell' but you will also be attracting potential sponsors and volunteers: Dress appropriately, be on your best behavior and interact with those that attend. Who knows, the person that is talking to you may have funds and resources available and they are just looking for a good reason to make them available to you.

- What should you do?
 - If your event or activity involves a Speech, do a Showcase.
 - If it's a Debate, hold a Debate.
 - If it's a Mock Trial, give them a Mock Trial.
 - If it's Science, set-up some displays and inform the attendees.
 - Bottom-Line! Do What You Do!
- People to invite and distribute flyers to:
 - Classmates
 - Friends
 - Family Members
 - Local Businesses and Organizations
- Time, date and location:
 - Depending on the audience choose the time, date and location that is most convenient for them and that will facilitate what you will be doing.
 - Classmates and Friends: Lunch time in the Center of the School, get your principals permission.
 - Family and Community: Evenings, after 6:00 pm in the School Auditorium, or some local, well known venue, again get permission.

SAMPLE LETTER OF REQUEST

School Letter Head if Allowed

Date

Business or Organization
Contacts Name
Address
City, St. Zip

Dear Mr./Ms.,

I will be participating in the *Event/Activity* at the *local, state, national* level. This event will take place at *Location, Date and Time*. The *Event/Activity* is an academic competition, in which schools compete at the county, state and national levels.

The *Event/Activity* is a *Brief description of the Event/Activity and how the community at large benefits* (this information is usually provided at the event web site or in event materials).

My name is *Your Name* and I am in *Grade Level* at *School*. I am participating in this years *Event/Activity*. The *Event/Activity* is an excellent opportunity for me to improve my understanding and skills in *What Are You Gaining from this experience*. This skills I will acquire from this experience will help prepare me for college and life beyond.

I am seeking donations to help offset the costs of *food, materials, travel, fees* to participate in the program. The total cost of participating in the program is *\$0.00*. I am presently looking for any support that you may be able to provide. Please see the enclosed information sheet for more information on the types of funds and resources that would be helpful.

I would be happy to speak with you personally about the rewards of participating in the program. This is a great opportunity to invest in education and in your community. Thank you in advance for your support.

Sincerely,
Signature

Name

Schools Tax ID#, or District NCES ID#

Contact Information:

*School
Contact
Address
City, ST. Zip
Phone/Fax
E-Mail
Web Site*

SAMPLE THANK YOU LETTER

School Letter Head if Allowed

Date

Business or Organization

Contacts Name

Address

City, St. Zip

Dear Mr./Ms.,

I would like to thank you for your generous donation of *What was Donated*. Because of sponsors like you, I am able to participate in the *Event/Activity*. If you are available I would be pleased to have you attend the *Event/Activity* on *Date, Time* at *Location*. Once the competition is complete, I would be happy to meet with you to share my experiences.

Thank you again for your kind and generous support.

Sincerely,

Signature

Name

Schools Tax ID#, or District NCES ID#

Contact Information:

School

Contact

Address

City, ST. Zip

Phone/Fax

E-Mail

Web Site

SAMPLE FOLLOW UP LETTER

School Letter Head if Allowed

Date

Business or Organization
Contacts Name
Address
City, St. Zip

Dear Mr./Ms.,

I am writing in reference to the *letter/phone call* dated *date letter was sent or phone call was made*. As busy as you must be, it's no surprise that we have not had a chance to talk yet. I am writing to confirm that you received the *letter I sent or the message I left*.

I am seeking donations to help offset the costs of *food, materials, travel, fees* to participate in the program. The total cost of participating in the program is *\$0.00*. I am presently looking for any support that you may be able to provide. Please see the enclosed information sheet for more information on the types of funds and resources that would be helpful.

I would be happy to speak with you personally about the rewards of participating in the program. This is a great opportunity to invest in education and in your community. Thank you in advance for your support.

Sincerely,

Signature

NAME

Schools Tax ID#, or District NCES ID#

Contact Information:

*School
Contact
Address
City, ST. Zip
Phone/Fax
E-Mail
Web Site*

SAMPLE INFORMATION SHEET

School Letter Head if Allowed

Who? Sam Smith Technical High School Academic Decathlon Team

What? 2010 Academic Decathlon

The Ventura County Academic Decathlon is a unique opportunity for high school students in Ventura County to compete against like teams of students countywide. The top Ventura County team participates in the statewide Academic Decathlon competition. A California team then participates in the United States Academic Decathlon which is the premier scholastic competition for students in America from both public and private high schools. The Academic Decathlon consists of ten academic events.

A particularly unique aspect of this ten-event scholastic competition is that it is designed to include students from all academic backgrounds. A team consists of nine full-time students from the 9th through 12th grades of the same high school. Each nine-member team is comprised of three students whose grade point average falls into the "A" category, three students in the "B" category and three students in the "C" category.

The mission of the United States Academic Decathlon is to: Promote and recognize learning and achievement by emphasizing the value of academic excellence for all students.



When? Saturday, January 9th and Saturday, February 6th, 2010: 8:00 AM – 3:00 PM

Where? Pacifica High School in Oxnard

Why? Each year approximately 300 Ventura County students, in grades 9-12, actively experience the excitement of working in teams, exchanging ideas, setting goals, and examining issues while interacting with positive role models from their communities. Developing the skills needed to be successful in this event helps prepare students for college and life beyond!

How You Can Help...

- **Financial Support:** to offset the costs of study materials, food, travel and registration fees.
- **Volunteers:** Part of the Academic Decathlon Competition requires that team members present speeches and take part in an interview. We need volunteers to listen, observe and provide feedback as we practice these skills.
- **Materials/Supplies/Facilities:** Paper, pens, pencils, etc. As part of our fundraising effort we will be hosting a Speech Showcase if you have a facility with a stage and that would accommodate approximately 200 people, we would love to use it for this event.

Your Support will be recognized in our School Newsletter that goes out to all Parents and Educators from our school. We will also list you as a support provider in the Program on the night of our Speech Showcase.

Thank you in Advance for any help or support that you are able to provide. For more information please feel free to contact us at:

*School
Contact
Address
City, ST. Zip
Phone/Fax
E-Mail
Web Site*