



FUND-RAISING

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FUND-RAISING OVERVIEW

Fund-raising is any activity that brings funding to your chapter for its projects. One of the key issues local chapters must face is how they will find the funds necessary to conduct the activities they wish to undertake. Without adequate funds, even the most innovative and enthusiastic chapter will not be able to implement its program of work. A dilemma faced by most chapters is “where will we get the money to conduct local activities and to participate in state and national conferences?”

- Have a planning meeting.
 - Meet with administration to discuss procedures, financial requirements, open dates, forms, and securing approval for your project.
 - Meet with the student officers.
 - Discuss the activities that your group is planning for the upcoming year.
 - Estimate the cost of these activities and compare it to current funds available to determine how much additional money will need to be raised.
 - Develop an event calendar, including your deadlines; then determine the best time (usually well in advance) to have a fund-raising event.
 - Appoint a fund-raising committee or coordinator.

- Develop a fund-raising plan. Choose the right fund-raiser for your chapter by taking into account:
 - The number of members in your group.

- Members’ interests and skills.
- Members’ enthusiasm for the event.
- Members’ time commitments.
- Creative ideas (have a brainstorming session).
- Other fund-raising activities already in progress.
- The best time of year for your fund-raising activity. Set the date. Pick dates that are not in conflict with other community or school fund-raisers. Clear the date with the school.
- Any costs for the fund-raiser (advertising, space, or food).
- School rules and regulations.

- Plan the fund-raiser.
 - Choose an appropriate date based on the kind of fund-raiser that you plan to have (taking into consideration weather and academic calendar).
 - Reserve a room or location well in advance of the date.
 - Plan a publicity campaign. Give the community paper plenty of notice about the fund-raiser. Advertise in the school newspaper and talk it up with the student body.
 - Form committees and delegate tasks.
 - Watch expenses—you don’t want to lose money on a fund-raiser. A budget should be made.

- Execute the event.
 - Have fun with it!
 - Have an incentive program for members.

- Evaluate the event.
 - Go through all receipts and deposit any money immediately.
 - Pay any bills accrued.
 - Thank all members and sponsors who contributed to the event.
 - Discuss the logistics of the event.
 - Begin to plan for next year.

BUDGETING

A budget should be made at the same time the chapter’s program of work is being developed. **REFERENCE: Sample Chapter Budget FUND-RAISING-7.** The program of work includes the goals and activities of the chapter. Anticipation of expenses will help a chapter to plan adequate fund-raising activities and make it possible for a chapter to reach the goals outlined in the program of work.

The budget is divided into two sections: estimated income and estimated expenditures. To determine these expenses, it is suggested to complete the available financial planning forms.

Questions to ask in determining the value or feasibility of an activity:

- Which FBLA-PBL goal(s) does this activity reinforce?
- Will it be a business learning experience? How?
- What are the risks involved? Are they worth the benefits?
- Has it been well thought out and carefully planned?
- Has it been tried in the past, and can any pitfalls be avoided?
- How will the funds be raised for this activity?
- Will it make money?

- Will it provide for business and community involvement?
- Who outside the organization might be of assistance?
- Have the school administration and advisory council been informed?
- How will the activity be publicized, both before and after?

The FBLA-PBL state office and national center should be able to give conference locations, dates, hotel rates, and registration fees for the current year. This information will enable transportation and food expenses to be estimated. **REFERENCE: Conference Budget Form FUND-RAISING 8.**

If the chapter would like to participate in the chapter events such as:

- American Enterprise Project
- Partnership with Business Project
- Community Service Project
- Local Chapter Annual Report

then financial planning should be done for each project. The initial step would be to elect a chairman and form a committee to determine member interest. This will help in planning the scope of the project.



CONDUCTING A SALES CAMPAIGN

A favorite fund-raising technique is sales. Before conducting a sales campaign, however, three crucial decisions must be made: what product to sell, to whom, and when. There are basically three choices for product—consumable, permanent, or semi-permanent. Consumable items can be sold on an annual basis, while more permanent products like toys and cookbooks should not be considered on a regular basis. Members should be included in product selection since the sales force will be more enthusiastic about pushing a product they selected.

- Study the market to match product to buyer. Carefully analyze this market and make realistic sales projections before building an inventory. If possible, take orders before stocking perishable items, such as fruits and holiday greens. Finally, when moving merchandise, remember parents, relatives, and students are natural customer prospects.
- Brainstorming can focus on promotional and publicity angles, possible selling techniques, and the different ways to motivate customer purchases. All members should be included in this activity.
- Selecting the time for a fund-raising event is just as important as product and market decisions. Careful planning will most likely make these timing decisions. Always allow ample lead time in preparation for the project. Chapters should address one very key decision with regard to timing. What is the value of the concentrated sales effort versus an unlimited time for sales? The concentrated effort is likely to be the more successful financially and

educationally as well. Having two weeks to sell puts everyone to work much faster. Avoid procrastination by building periodic sales goals into the timetable.

- There may be times, though, when the unlimited sales period is the best choice. In this case, hold periodic sales rallies to maintain momentum. Develop procedures to minimize the time spent on tracking money and accounting for inventory.
- The experience gained in fund-raising projects is as important as raising the money. Manage the project as any other chapter activity. First, get permission from school administration. Then establish an organization with lines of authority, delegate responsibilities, and communicate these to all members. Follow a timetable, adhering to deadlines as closely as possible, and evaluate progress at different stages. Be prepared and be flexible enough to make changes along the way. An organization chart can establish who takes orders, who maintains inventory, who keeps accounts, and who deposits funds. Keep the organization simple and uncomplicated with maybe just a chairman, accountant, sales manager, and promotion manager.
- Before the sales force “hits the streets,” a few training and practice sessions are in order. A successful business does not send its sales force out without proper training and complete product knowledge. Role playing can help prepare members to overcome customer objections.
- Incentives or commissions can work wonders to motivate the sales force: offer prizes and recognition for effort and results.
- The job is not over when the final dollar is counted. Often neglected, program evaluation is a valuable educational experience. This process will help the chapter plan and conduct more successful events in the future. From the outset, evaluation should be built into various planning and schedule checkpoints throughout the course of the project. Someone should track the project as it progresses—recording how it was organized, methods for promotion, any problems that arise as well as particular success stories to note. The evaluation can close with suggestions for future projects of a similar nature.



OTHER FUNDING SOURCES

School Funding

Availability of funds from the school, business department, and finance board should be checked first. Look into the school board's policy on funding. It is recommended to submit the chapter's estimated expenditures at budget preparation time to the administration to determine if any funds can be allocated for the current and future school year(s).

Donations

Donations are a great way to retain money raised by your chapter. Never buy anything that you don't have to buy. Many stores are more than willing to donate food, prizes, cash, or anything they can to help with projects. Anytime you get something donated, it isn't costing your chapter a dime. That means that you are saving money. Remember when asking for donations:

- Find members who aren't afraid to ask and delegate them this responsibility.
- Send a letter first, then follow up one week later with a phone call.
- Be polite.
- Tell them who you are and let them know you represent a nonprofit organization.
- Ask for what you need and not what you want.
- Remember to say thank you and acknowledge them as publicly as you can. Always follow-up with a thank you card.

Sponsorships

Sponsorships are not only a good way to raise money to support your chapter, but also a great way to begin working with the businesses in your community. The number

one thing you need to consider when trying to find sponsors for events and trips is what the business get in return. Approach the business and be ready to bargain. **REFERENCE: Sample Donation/Sponsorship Letter FUND-RAISING-9.**

- Offer student workers for a day or two.
- Put their logo on your T-shirt.
- Tell them their name will be on the press release about this project, activity, or trip.

When your students begin approaching the businesses, one of the key things to remember is to be professional and project a positive image. Being professional not only means being dressed well, but also means being prepared. Students should be prepared to answer all questions. For example, the business may ask, "What is FBLA-PBL?" or "Why should we help you?" Students should work together as a team and deliver a team presentation to the company. Finally, students should make sure that they have quality literature to leave with the company and obtain a contact for the company so that they can make a follow up phone call. Once your chapter forms partnerships or sponsorships, don't let them die. Try to maintain them year after year. Work with the same people and make sure that the companies know that they can rely on your chapter to help them if they need help, just as they helped your chapter in your time of need.

Local Dues/Member Contributions

Some chapters decide to charge members local dues to offset expenses. In addition, members also can be asked to pay some or all of the costs to attend a conference.

Adviser Compensation

Many advisers are reimbursed for the costs of attending conferences including transportation, registration, food, and lodging. The reimbursement of these expenses can offset the chapter's overall estimated expenditures.

Special Funding Pool

Some states provide special funding to new and existing chapters. Compensation may also be available from the FBLA-PBL state office to students who qualify to compete at the National Leadership Conference.

FUND-RAISING PARTNERS

The following highlights some tried-and-true fund-raiser partners, as well as some new partners. The national association sponsors several fund-raising programs that are outlined in this section. Local chapters are encouraged to participate in one or more of these programs as their needs require. In addition, several state chapters also sponsor fund-raising programs. Be sure to check the Fund-raiser section of our Web site under Membership Benefits for fund-raisers added throughout the school year.

Clutch Performance Funding—New

Clutch Performance Funding is a revolutionary fundraising platform that seamlessly integrates social networking with an online fundraising program customized for your organization. Clutch Performance Funding will create a customized web site for your organization featuring an online store offering high quality consumable products, high quality apparel featuring your school logo, and the ability to accept direct donations without a purchase. All consumable products and apparel will pay a minimum of 50 percent paid directly to your organization. Clutch Performance Funding takes the headache out of fundraising!

Country Meats

Country Meats is providing FBLA members a simple, healthy fund-raiser that features fresh smoked snack sticks that everyone loves. They have zero trans fats, low carbs, high protein, and come in 14 yummy flavors. But that's not the best part, chapters receive 45 percent profit and have 30 days to pay the bill! For more information call Country Meats at 1-800-277-8989 for a few free samples or visit their Web site at www.countrymeats.com.

Dave's Billboard—New

DavesBillboard.com—where fundraising and business education finally connect! We have something that 40 percent of small businesses absolutely need—and they know they need it! You can help them get it, and raise an incredible amount of money for your organization! Students learn business by being in business. Enrich your curriculum and FBLA-PBL chapter with our easy to follow “Business in a Box Program.” Your chapter earns a residual income stream while your

students acquire valuable business experience at many levels. Visit www.DavesBillboard.com and click on our Fundraising Platform link. Please direct any question to Dave Spiker, CEO, successful entrepreneur, and past FBLA adviser at davespiker@bigplanet.com.

Entertainment Fundraising

Why fund-raise with someone else's product when you can Create Your Own? Reach your fund-raising goals with your very own, professionally designed FBLA-PBL Coupon Book Fundraiser! Your one-of-a-kind book will feature your chapter name, group picture, and FBLA-PBL logo—right on the cover! Get More Info Today!

- Create a fund-raiser that no one else has!!
- Earn at least \$9 each...up to \$10!
- No upfront costs, ships in just 4 weeks
- Choose 40 valuable coupons from over 200,000 locations
- Sells for just \$20 – contains \$1000s in savings

Your members will be proud to offer this fund-raiser because it promotes FBLA-PBL and gives your supporters valuable coupons. Visit www.entertainment.com/fbla-pbl to learn more and get started right away! To speak with an Entertainment Fundraising Specialist call 800-630-3494. We'll be happy to explain how to get started and the profit you can expect to make!

Otis Spunkmeyer

With Otis Spunkmeyer you will benefit with both educational and financial rewards. The Otis cookie program is your recipe for success and profits—in your school store or anywhere you can bake and set up a cash box and sell cookies. Try selling them at sporting events, before or in between classes, or even at school functions. Earn up to 50 percent profit on every cookie transaction! We support business education by including everything you need to bake and sell irresistible cookies from day one.

You can also generate even more dough for your chapter with an Otis Spunkmeyer tub fundraiser. Our pre-portioned dough in 2.5lb. reusable tubs are proven to raise more money for you no matter what the cause. Students already know and love Otis Spunkmeyer cookies, making the selling process even easier. Selling our tubs is a great way for people to have access to Otis cookie dough for personal home use. For an added touch, think about teaming up with a local charity and donating a portion of your proceeds to them.

Get started today! For questions or comments on any of our products and programs, please contact 888-ASK-OTIS (888-275-6847) or visit www.spunkmeyer.com. Be sure to mention you are with FBLA-PBL.

Ozark Delight Candy Company

Each batch of Ozark Delight Lollipops is consistently monitored to maintain their high standards of production. Ozark Delight Lollipops are available only for fund-raising. They do not sell to stores or other retail markets. Ozark Delight now offers a new “Better For You” lollipop that adheres to nutritional standards nationwide. Call Ozark Delight at 1-800-334-8991 to learn more about their fund-raising opportunity and to receive samples of their new product.

Pride Distributors

Pride Distributors is a fund-raising company that specializes in producing “Your Town-Opoly,” a custom board game where the “local merchants” of each chapter’s hometown replaces the Atlantic City streets found on your favorite board game. Request a free getting started kit and a free sample game. They will help you create your own Town-Opoly fund-raiser. Call Pride Distributors at 1-800-451-5442 or visit www.townopoly.net.

Schermer Pecans—New

Are you tired of the same old fund-raiser? Do you want a delicious and healthy choice for your fund-raising project? Then SCHERMER PECANS is the company for you! Our products are 100 percent guaranteed. We have been in the pecan industry for over 60 years with proven success in the fund-raising business. Our products are grown and manufactured by us.

- Free Shipping
- Only a 1 case minimum order (24 bags of the same product)
- No money upfront with approved credit.
- Free information and samples.

Call today to get started at 1-800-841-3403, e-mail schermerpecans@yahoo.com, or visit www.pecantreats.com.

School Spirit Coffee

School Spirit Coffee provides a unique fund-raiser that is personalized to each chapter or school. From the size and color of the coffee packaging, to the design of the label, the finished product is created to boost school spirit and ultimately boost your profit potential. Chapters receive a 50 percent profit from their sales. Call 1-800-570-1443 or visit www.schoolspiritcoffee.com for information on scheduling a fund-raiser.

Tom-Wat Fundraising

Tom-Wat Fundraising has been committed to helping FBLA-PBL chapters raise money since 1951. They offer a wide variety of fund-raising programs that are easy, profitable, and work well for chapters of any size. Chapters may choose from gift catalogs, magazines, lollipops, chocolate bars, cookie dough, Auntie Anne’s pretzel and cinnamon buns, candles, jewelry, flower bulbs, chocolate lollipops, and much more. Their friendly customer service staff is available at 1-800-243-9250 or visit their Web site, www.TomWat.com.



SAMPLE CHAPTER BUDGET

School: _____

Estimated Income:

Membership Dues and Fees	_____
Fund-raising Projects	_____
_____	_____
_____	_____
_____	_____
Contributions	_____

Total Estimated Receipts: _____

Estimated Expenditures: (itemized expenses attached)

Membership Committee	_____
National Dues	_____
State Dues	_____
Other	_____
Executive Committee	_____
State Fall Leadership Conference	_____
National Fall Leadership Conference	_____
District/Regional Conference	_____
State Spring Leadership Conference	_____
National Leadership Conference	_____
Other	_____
American Enterprise Committee	_____
Partnership with Business Committee	_____
Public Relations Committee	_____
Social Committee	_____
_____ Committee	_____
_____ Committee	_____
Other (itemize)	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total Estimated Expenditures: _____

Balance at Beginning of Year _____

Total Receipts _____

Less Total Expenditures _____

Estimated Balance at End of Year _____



CONFERENCE BUDGET FORM

School: _____

Conference: _____

Date(s): _____

Location: _____ Hotel: _____

Number of Students: _____ Number of Advisers: _____

Cost				No. Persons	Total
Registration					
Member			\$ _____	x _____	\$ _____
Adviser			\$ _____	x _____	\$ _____
Guest/Chaperone			\$ _____	x _____	\$ _____
Meals	_____ days	@	\$ _____ /day	x _____	\$ _____
Hotel					
Quad	_____ days	@	\$ _____ /day	x _____	\$ _____
Triple	_____ days	@	\$ _____ /day	x _____	\$ _____
Double	_____ days	@	\$ _____ /day	x _____	\$ _____
Single	_____ days	@	\$ _____ /day	x _____	\$ _____
Transportation					
Ground	_____			x _____	\$ _____
Air	_____			x _____	\$ _____
Other (itemize)					
	_____			x _____	\$ _____
	_____			x _____	\$ _____
	_____			x _____	\$ _____
Total Estimated Expenditures					\$ _____



SAMPLE DONATION/SPONSORSHIP LETTER

(Insert date)

Dear (insert name of business contact):

Future Business Leaders of America-Phi Beta Lambda, Inc. (FBLA-PBL) is the oldest and largest national organization for students preparing for careers in business. FBLA-PBL prepares students for real world professional experiences. Members gain the competitive edge for college and career successes. More than a quarter of a million students participate in this dynamic leadership organization.

FBLA-PBL provides students with:

- Leadership development
- Community service experience
- Conferences and competitions
- Networking opportunities
- Travel opportunities
- Scholarships and prizes
- Friendship and fun

The big event of the year is the National Leadership Conference, which is held in (insert site of conference) this summer. At the national conference, members have the opportunity to attend workshops, meet members across the nation, and compete for awards and recognition in more than 55 different event categories including Web site design, video production, marketing, business plan, public speaking, job interview, and many more!

(Insert number spelled out) students at (insert school) have earned the privilege of competing at this year's National Leadership Conference. In order for them to attend this year's conference; however, they need your support.

FBLA chapter members would like to schedule a time to meet with you to discuss this opportunity and how your business can help. Members of our chapter will be contacting you by phone within the next few days.

We look forward to meeting you and sincerely hope your business will help our members as they work towards achieving their goal of becoming the business leaders of the future.

Sincerely,

Jane Doe
(Insert school) FBLA President