



Fundraising Strategic Plan:

A Work-flow Management Tool for Your Fundraising Efforts

All Star Fundraising, LLC

2019

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Fundraising Strategic Action Plan

Preface

Fundraising for school groups, daycares, sports teams/activities, and small civic groups can be a daunting and frustrating task. The internet boasts a seemingly eternal list of companies, products, strategies, and ideas for fundraising. A simple query on any search engine will bombard a weary group leader with ads and websites boasting of great profits and easy solutions. Mail outs with all sorts of promotions, products, and ideas are mailed by companies daily, and can quickly crowd any group leader's mailbox.

One fact is consistent, you need money. You have that big end of the year trip looming over the horizon. Perhaps you need to purchase strategic equipment for activities. Maybe you are raising money for a non-profit organization. The needs seem to be endless, and with shrinking budgets and shaky economic times, getting those prized dollars to keep things running smooth, can be gut-wrenching. How can anyone navigate the pains of finding what fits their particular group's needs and values? After all, any fundraising company can make big promises while ultimately severely under-delivering.

Why We Released This Document.

With many years of experience and practice in the realm of fundraising, the *All Star Fundraising* team understands how most group leaders and parent volunteers feel. We have experienced the turbulent waters of fundraising with our own groups as youth leaders, parents, and volunteers. We have felt the same exasperation and confusion as funds come up short only to face the potential of canceling plans or activities. We have worked with other companies, planned events, and orchestrated raising thousands of dollars, all while loathing the typical processes and hassles. Through these experiences, we have developed a simple work-flow which any organization can follow. Whether you choose *All Star Fundraising* to be your go to source for getting that cash you need, or not, we hope you find this workflow beneficial for discovering what works for your group. We believe the process we've laid out here will offer clarity and direction so you and your group can reach your goals and keep your sanity.

So, let's get started!

Determine the Decision-maker.

Remember, often the most important decisions are made before one dollar is brought into the coffers. Each group will make their decisions a bit differently. You may be a parent volunteer for your child's school or sports team. You may be a teacher with a million responsibilities other than trying to find money for your students' activities. You may be a coach, sponsor, principal, or youth pastor. Whatever your position and whatever the group, someone has to make key decisions before, during, and after your fundraising campaign. Whether you are responsible, or that responsibility is to be delegated, here are some important thoughts to ponder for yourself and other volunteers.

- **Organization** – Fundraising is a challenge; organization skills are a must. Volunteers need to be recruited, money will need to be counted and deposited, and information must flow. Be organized. Find what works for you and stick with it.
- **Trustworthiness** – This should be obvious when dealing with money, but it's still always best to have at least two people dealing with money. You can't be too careful here. Accusations, true or not, can and will destroy the best of efforts. Create a system of accountability and disclosure.
- **Communication** – Goals, ideas, needs, processes, tasks, etc. must be clearly communicated, so person-to-person skills are essential. Use meetings, emails, letters, social media, calling trees, newspaper ads, community message boards, local radio, etc. to communicate the necessary information to the right people at the right time. If people don't know, how can they help?
- **Dependability** – Punctuality for scheduled dates and deadlines are an indispensable element to successful fundraising. Know what your deadlines are and keep key appointments and meetings on time. Be an example and set clear expectations.

Who will be making your group's fundraising decisions? _____

How will you stay organized? _____

Do you have a process of accountability for checks, money, deposits? _____

What avenues for communication do you have in your community/group?

Determine the Need.

While this may seem obvious, many groups don't really know exactly why they need money. They just need it, and they need it fast, and, usually, they need a lot of it. If you are not sure exactly why you need funds, you must isolate at least one specific need. After all, you are about to go out into your sphere of influence to ask people to help you. These people or organizations must know why you need help. Perhaps your group is planning a trip or registering for a competition. Maybe you are trying to raise money to benefit another organization such as Relay for Life, March of Dimes, or Habitat for Humanity. Many groups need funds for equipment, training, travel, and many other very specific items. You, as an individual, or perhaps the entire group, must make this critical decision as early in the process as possible. People in your community are far more likely to join your efforts if they are clear on what you are doing and why you are doing it. Vague and general ideas will often result in speculation and a lack of support.

“ PEOPLE ARE FAR MORE LIKELY TO **JOIN YOUR EFFORTS** IF THEY ARE CLEAR AS TO **WHY** YOU NEED HELP!

Why are you raising funds?

Determine the Value.

When thinking about making your needs and goals clear, this next step is critical. Most groups never stop to ponder this idea, but you would be wise to do so. How does your need impact your community? How does your group offer value to your community? Your group members are about to walk into your community and ask for support. In order for potential patrons to support you, they need to know what value you bring to their community. For instance, if you represent a High School Band, you bring tremendous value to your community. Your program offers students the opportunity to grow and develop in performing arts, while at the same time learning discipline, personal skills, and artistic expression. Not to mention the fact, you are offering activities to keep kids off the streets and focused on productive pursuits. It doesn't matter what type of group you represent, you should spend time thinking about how your group or activity brings value to your potential supporters. Think of ways you can creatively express this value to your potential patrons. When your community can emotionally connect to the value you bring, you'll have all the support you'll need!

“ WHEN YOUR COMMUNITY CAN **EMOTIONALLY CONNECT** TO THE VALUE YOU BRING, YOU'LL HAVE ALL THE **SUPPORT** YOU'LL NEED!

What value(s) does your group bring to your community?

What value(s) does your fundraising campaign bring to your community?

How can you creatively express this value to your potential patrons?

Determine the Amount.

Once you know what you need, or what you are going to accomplish, and what value your group brings to your community, you should then determine the amount of money you will need. Often, this requires making a budget. Yes, it's the big bad "b" word, but the fact remains that if you are setting out to raise money for any project, you better know how much you need. Nothing would be more frustrating than to work hard raising money only to fall short because someone neglected to find out how much would be needed in the first place. While how to set a budget would require too much space here, the main ingredient to a quality budget is to know your expected expenses. Make as detailed of a list as possible of what your expected expenses will be. As for your fundraising campaign, many fundraisers require significant investment. Some of these may include:

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 OUT **HOW MUCH WOULD BE**
NEEDED IN THE FIRST PLACE.

- Promotional materials
- Startup fees
- Upfront cost of products/inventory
- Weight/volume delivery fees
- Advertising/media

Always remember to ask a fundraising company how much upfront costs and hidden costs (penalties for not meeting minimums, shipping and handling charges, etc.) may be incurred.

How much money are you trying to raise? _____

Determine How You Will Raise Your Dough.

It's no secret that fundraising and fundraisers, in general, are not very popular. Fundraisers tend to be the "necessary evil" persistent within various community groups. With that thought in mind, your group must choose how they will bring in the cash to fulfill the need you determined above. Remember, effective fundraising efforts look to express or add value to your fundraising partners. Once you understand the value your particular group offers by being in the community, you should look for ways to raise your money which continue to add even more value to your patron's lives. The following are three ways to get money into your bank:

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**EFFECTIVE
 FUNDRAISING**
 EFFORTS LOOK TO EXPRESS
 OR ADD VALUE TO YOUR
 FUNDRAISING
 PARTNERS.

- **Ask for it.** That's right, just ask folks to give you money. You may ask your group members and/or parents to pay a fee of some kind. You may ask donors to pledge or write checks. You may even write letters or grant proposals to solicit funds. The key is effective communication skills. This is probably, at least for many, the most difficult method for raising those elusive dollars.
- **Plan an Event.** This type of fundraiser can really bring in the cash. Groups of all sorts have come up with great event-driven fundraisers. Here are some examples:
 - **Golf Tournaments**
 - **Poker Tournaments**
 - **Auctions**
 - **School Plays/Performances**
 - **Field Days**
 - **Sporting Events (Baseball, Basketball, Softball, etc. Tournaments)**
 - **Dinner Parties**
 - **Dances**

Of course, the list goes on and on. We've seen some pretty creative ideas. The key to most of these events is having the specialized talents, organization skills, and time to pull it all off.

- **Sell it.** This is traditionally the most efficient, timely, and regularly utilized type of fundraiser among school groups, daycares, youth sports teams, small civic organizations, and church youth groups. While organization is necessary for success this type of fundraiser typically has a structure in place for collecting orders and money, and getting the products to a location for distribution to each seller. When selecting this fundraising method, keep these questions in mind:



Shameless promotion? Yes, but please understand, we care. We are here to "help people help themselves". We have a simple, proven program matched with the unique, exclusive Butter Braid® pastries.

[Just check out what people are saying about us!](#)



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- **What is the price point of the product(s) for the end user?**
- **How many product choices is the potential patron offered?**
- **How unique are the products being offered?**
- **Is there realistic value to your potential patrons?**
- **What is the profit margin for your group?**
- **Are there any hidden costs to run the fundraiser?**
- **How long does the fundraiser last?**
- **How long will it take to get the products back?**

This type of fundraising can be the easiest and most profitable form of fundraising available; however, choosing a quality product and service-friendly company can be difficult. Many are the horror stories resulting from poor customer service, low-quality products at astronomical price-points, long turn around for product delivery, delivery day madhouses, unclear processes, hidden fees, complex quantity-to-profit formulas, and difficulty in reclaiming profits from the sale.

What product-oriented fundraisers have you researched?

Do any of the fundraisers require any upfront costs?

How are the profit margins calculated for these fundraisers?

What are the price points the end-user will pay for products?

Will the end-users (your fundraising patrons) find real value in buying these products?

Do you understand how each fundraiser works from beginning to end?

What is the delivery process for the fundraising products?

Determine When To Run.

By now, you should have clarity on how much cash you need and why you need it. You should know how your group's goal brings value to your community and have a plan to communicate that value. You should have at least one person identified as the key decision-maker for your fundraising campaign, and what you'll be doing to raise all that cash. Now, you must determine the best time-frame to bring all that coinage into your bank account. Of course, the first thing you'll need to know is when you'll be needing those funds. Typically, you'll need the money in your possession to buy that equipment or go on that trip. After all, credit isn't cheap. So, at this point, you need to work through the following questions:

- Do you need the money right away?
- Will you have several months to attain your monetary goals?
- Will you need to run multiple fundraisers to hit your target?
- How much fundraising is too much?
- Should I have several different fundraising campaigns going at the same time?

“ **REMEMBER:** YOUR MOST PRIZED RESOURCE IS YOUR **TIME**. FIND A FUNDRAISER WITH MINIMAL TIME CONSTRAINTS AND **MAXIMUM POTENTIAL**.

While thinking through these questions, also remember to think about the participants in your group and your community at large. Here are some thoughts to keep in mind:

- People, including yourself, will get very tired of endless fundraising. Especially those folks from which you are soliciting your funds.
- You should focus on maximizing your time, productivity, and the mental image you create within the community concerning your group. Groups which are continuously begging for a dollar, no matter how worthy the cause, tend to be perceived negatively.
- Remember your most prized resource is your time. Find a fundraiser with minimal time constraints and maximum potential.
- Go for it!

What date do you need the money to accomplish your goal? _____

Determine Who Will Help!

Leveraging the time and talents of those in your group is possibly the most vital element to your fundraising success. You have the experiences, good and bad, of those who care about your group's success. Often, group leaders or parent volunteers feel isolated, confused, and bewildered by the stress of making goals and accomplishing large tasks. The following list can help you build a team and divide the work, so that you can successfully reach your goals without burning yourself out.

- Make a list of things which need to be done.
- Make a schedule if need be so that your efforts stay on point.
- Recruit your volunteers. Ask for help. Remember, it's not weakness to need help.
- Share your needs.
- Ask what your volunteers are good at and are willing to do.
- Assign tasks with clear goals and a schedule for completion.
- Follow-up.

“IT'S RARELY PRACTICAL OR SMART TO GO AT IT ALONE.

GET HELP!!

Remember, depending on the size of your group and the size of your goals, it's rarely practical or smart to go at it alone. Even having the additional accountability can be productive and a safeguard for any inconsistencies which may crop up concerning money.

| Who are your volunteers? | For what tasks are they responsible? | Deadline? |
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Determine to Stay Determined!

At *All Star Fundraising*, we operate on a key philosophy: *anything worth doing is worth doing right!* You should be convinced of the worthiness of your goal. You should clearly understand its value for yourself, group members, and your community. With that thought in mind, hang in there. Fundraising is rarely anyone's idea of an exciting good time. It's work. Often, it's thankless work. Budget cuts and economic woes have caused an endless line of folks asking for money. This is why we feel one of your most important tasks is figuring out what value you offer your community. People connect to values. They don't mind supporting worthy endeavors. If you clearly comprehend your value, you won't mind striving and struggling through the process of making your goals a reality. Remember, these principles when things don't go as planned:

“PEOPLE CONNECT
TO VALUES.”

- Don't sweat the small stuff.
- Don't take push-back and/or unsupportive people personally.
- Comprehend the big picture; then, tackle one thing at a time.
- Always get help.
- Clarify, Communicate, Clarify, Discuss, Clarify, Communicate.

Final Thoughts.

We hope the process outlined above helps bring clarity and focus to your fundraising activities. The hard work and decision-making are ahead of you, but with this bag of tools, you can move forward with passion and a clear direction. You, and your group, can reach the goals you establish. Also, you can and will bring value to your community.

At *All Star Fundraising*, our mission is to “help people help themselves.” If this booklet helps you, we have, in a small way, accomplished our mission.

However, we have so much more to offer. Often, we are identified by our product, the famous **Butter Braid® frozen pastry**. We are proud to be the exclusive distributor of these fine pastries throughout Arkansas, North East Texas, North Louisiana, North Mississippi, and Shelby County Tennessee. We believe we have the absolute best product on the fundraising market today.

Yet, we are so much more. We are fundraising coaches. We have helped thousands of groups raise hundreds of thousands of dollars, all with our personal, one-on-one support from setting up the fundraiser to actually sorting the order at the delivery for our groups.

It's why our customers come back year after year after, for over 12 years.

The All Star Fundraising Team



Austin, Alesha & Bailey Taylor

Austin is the principal owner and founder of All Star Fundraising. He and Alesha began in 2002 in a small restaurant in Lewisville, Arkansas. Over the last decade, they built a strong team, and have grown into a 5,000 square foot central office and warehouse located in Benton, Arkansas, with \$1,000,000 in annual revenues. Austin and Alesha live and play in Benton, Arkansas, with their son and daughter. They have been involved in church ministry for many years, and were cofounders of a church plant in the Memphis area.

Adam and Amber Henderson

Adam and Amber are the proud parents of their little boy. They have worked for 10 years growing the All Star Fundraising brand while working in Texas, Louisiana, and Arkansas. Adam is intimately involved in the day-to-day operations of the warehouse facility in Benton, Arkansas, as well as working one-on-one with fundraising groups across Arkansas.

Sheila Taylor

Sheila is the glue which binds us together. She has worked with All Star Fundraising for several years in nearly every capacity. She resides with her husband Roger in Benton, Arkansas, where Roger is a local church pastor. They both have worked one-on-one with fundraising groups across Central Arkansas. Sheila is now the office manager/secretary/bookkeeper/data processor/whatever-else-needs-to-be-done-person. Oh, and she's Austin's mom, so if he acts up, just call the office and let Mom know!