Andrea Battaglia
MoPTA VP Communication

Smart & successful strategies to benefit any Unit/Council

Fundraising & Friendraising

Fundraising Options

Writing Letters, Sending emails

Sponsorships, Business Memberships

Crowdfunding

Fundraising Sales

Fundraising Events

Personal Solicitation

In-Kind Donations

Improve Your Fundraising Strategy

4%

Sending letters, emails

44%

Personal Solicitation

84%

Empowering your network of committed volunteers.

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Organize Your Strategy

The Foundation of Your Success

Organize Your Strategy

Elect a fundraising officer or start a fundraising committee

Define officer/committee responsibilities
Set clear expectations for officer/committee and provide follow-up, support

Determine how you will encourage PTA participation and member/parent support

Use resources/experts that you already have available

If you don't have a qualified candidate for a fundraising officer, recruit this person.

Often, people just want to be asked and know that their skills are noticed and valued.

<u>What to look for:</u>

- **Organized**
- **Passionate**
- **Reliable**
- **Excellent Communicator**
- **Responsible**

Set **realistic goals** for your fundraising officer and committee. Work with them to **develop achievable action steps** to accomplish fundraising strategy.

Think Point #1: Individual PTA/Council What are three fundraising goals for my PTA this year?

Ask Key Questions

Asking The Right Questions In Advance Is A Smart, Successful Strategy

Ask Key Questions

Who is my audience? What type of event will attract this audience?

What is the purpose of this event?

What is the best venue to attract the right crowd?

How can I streamline workload to minimize stress?

What is the key theme and call to action to encourage response?

When you:

1. **know what you expect from your fundraising program**
2. **can clearly define your goals and actions**

You are more likely to achieve your desired results.

You don't need to do everything. Delegate important responsibilities to **committed volunteers** and empower them to successfully reach the goals.

Breakout #2: Groups

Describe your PTA to group

Answer the Key Questions

(on previous page)

3 SMART, Defined Goals

These Goals Matter! People Appreciate SMART Goals

SMART, Defined Goals

Develop your strategy – what you want to do, when you want to do it

- Raise money – what is the $ goal?
- Increase supporter lists – how big are your current lists? By what percentage would you like to increase them?
- Attendance – is there a capacity issue? How many more prospects will you target?
- Attract **amplifiers**, donors, sponsors – what is your pre-event and post-event strategy?

Determine how you're going to keep your strategy going

Decide who is going to do each action to accomplish your strategy

S
Specific

M
Measurable

A
Agreed To

R
Relevant/Realistic

T
Time-Bound

People want to help, but it **scares helpers** when you don't have defined roles and specific time needs. Don't just ask for help, **strategically invite others** to help you.

Breakout #3: Individual PTA/Council

Make your goal Specific, Measurable, Agreed to, Realistic, and Timed

4 **Set** Your Budget

To Raise Money, You Have To Strategically Spend Money

Set A Budget For Your Fundraising

How much will you spend to reach your goals?

Is this a reasonable amount given your priorities?

Be sure to include a contingency for unexpected charges or overruns.

Develop a list of what you need to purchase to complete your fundraising goals.

Remember In-Kind Donations can help limit the spending and are valuable contributions.

Be realistic with your spending. Determine if it's an overall total or a per-person spending total.

PTA fundraising is a **powerful investment** for you kids and your school. Be **fiscally responsible with your spending** to achieve your fundraising goals.

Breakout #4:

Individual: How much money can we invest in PTA Fundraising this year?
Group: What are fundraising strategies that have worked for you?

Friendraising: Get your Members & Parents Involved

Empowering Others Enhances Excitement & Champions Success

Get Your Members & Parents Involved

Empower your team and set them up for success – specific, small responsibilities with timelines

Ask for help from parents, administrators, corporate sponsors

Develop standards for managing helpers/volunteers – ensure everyone is supported

Create excitement by sharing information and success to key communicators, volunteers

Determine where this step falls in your timeline:

Start too early and volunteers are discouraged with the lack of information and direction.

Start too late and volunteers don't feel engaged or valued.

The right time is when you can fully explain the project and/or just before you feel ready to begin.

Constant communication is one of the most valuable and effective methods to managing volunteers. Be **clear and consistent** in your expectations and your support.

Breakout #5:

Individual: Who are three people I can get involved?

Group: What are ways I can ask those I don't know?

6 **Promote!** Your Fundraising

We are bombarded with messages; make sure yours stand out!

Promote! Your Message

- Outreach to local media
- Calls to influential supporters
- Flyers/Posters in key places
- Post on your website – use a widget or a giving button
- Send emails to contacts, members and friends
- Post on sponsors websites
- Include in e-newsletters
- Post on Social Media Sites
- Corporate Sponsors can encourage their employees to engage

Your BEST Fundraising Strategy

Empower your biggest fans – as your most loyal supporters – to spread the word to their networks on your behalf

The most **powerful fundraising** resource you have is committed, engaged volunteers. They will **share your story** and encourage excitement for your project.

Breakout #6: Group

What are strategies that have worked best for your PTA? (Examples could include communication, planning or implementation)

7

Assessment & Evaluation

Analyze, Engage & Build Relationships

Assessment & Evaluation

Study Data using reporting tools and analysis forms – SWOT analysis, including financial and attendance information is recommended.

Get feedback from staff, sponsors and participants to assess what worked – and what didn't. Record and share this information within your organization.

Re-engage participants – from sponsors to volunteers and attendees to donors.

Make selected "Thank You" phone calls or write notes and include a follow-up invitation to get involved. Reach out to new participants and share organizational information and future invitations.

Report back to everyone on the impact of the event and your key issue and goal.

Don't overlook Assessment & Evaluation, this can be a powerful tool to build on success and overcome obstacles.

Effective data collection can propel your PTA forward. Be sure to include this discussion in Officer Transitions!

Evaluation improves your fundraising, your projects and your group. It's a **mighty resource** that can change the success and dedication of your team.

Breakout #7: Individual PTA/Council

What are three final strategies that you can commit to doing? (Examples could include Evaluation, thank you notes, documentation)