

# ***Organizational Tips and Hints for Success***

Welcome to Organizational Tips and Hints for Success. This section is devoted to identifying ways your organization can help support its members to reach their fundraising goals. As with the previous section we will first review the topics list then fill in details that support each topic. Let's get started.

We will start this segment by listing the following topics that will be detailed in the presentation: they are

- . Planning
  - . Define the organizational objective
  - . Establish a clear fund raising financial goal
  - . Establish event dates
  - . Planning the event kick-off
  - . Event publicity
  - . Personnel requirements
  - . Training
  - . Event kick-off
  - . Event management
  - . Distribution management
  - . End of event celebration
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## ***Planning***

Planning is fundamental in a successful fundraising effort. The organization must provide a clear direction to follow. Planning addresses all of the details that must take place in a clear step-by-step sequence of events.

If a Planning Committee has not been established we suggest it would be beneficial to start one. This committee should have as its members, segments of each group within the organization that is responsible for any activity during the campaign. The duties of the Planning Committee will include all of the tasks we will detail in the rest of this section.

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## ***Define the Organizational Objective***

You may have heard the old adage "You can't hit a target that you can't see", that's especially true for your objective. Everyone must be able to see the target of your efforts. You must strive for clarity when defining what your group is working toward. There are two important steps in helping to define the organizations goal. The first is the "5 Why's".

In the Personal Recommendations for Success portion of this presentation we ask the participant to pretend they are someone that has just heard about your organizations goal. It's important to ask "Why" after this initial information exchange and continue to do so four more times. This series of "5 Why's" will ultimately lead to the very heart of the benefit that this goal will produce.

Once you ask yourself these "5 Why's" you will be able to communicate this information to anyone you inform about the groups goal. It will help to provide a clear, precise and understandable explanation of the objective and benefit.

The second important goal definition tool is to develop no more than three sentences that describe exactly what your group is working toward. Included in these sentences is the reason or need for the project, who will benefit, why the project is important and the date when the project will be completed. These sentences should be recited

by anyone involved with the activity and should be the cornerstone of the project description.

By limiting the quantity of the sentences it forces you to choose your words wisely and consequently they will better reflect what you are trying to say. You may elect to have 3" x 5" cards printed to help others in communicating this important message. I'm sure you have all played the game of having a line of people whisper a message to the person standing next to them and have that same message be transmitted from one person to another until the last person announces the message out loud. Its hilarious to hear how distorted this simple passing of a message can become. There is an important lesson to be learned from this game, you must have a way to communicate your message without it becoming distorted.

When you are clear about your goals it will be easier for others to get behind the vision and help to make it a reality. By using these two techniques you will be able to provide your organization with a clear vision of the project and you can be sure that a consistent message is being delivered to everyone.

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### ***Establish Fund-raising Financial Goals***

As important as establishing a clear picture of the project is the need to define exactly how much money is required to complete the project. This step is frequently overlooked but it is so critical in the overall plan. As we have said before, it's impossible to hit a target you can't see.

Once the total fundraising need is defined, divide the total into the number of people participating, further stratify or break down the individual totals into the required number of pies to be sold by each individual. This will help identify exactly what price to place on the pies and how many pie sales each member is responsible to attain.

If the financial target is large, multiple fundraising attempts may be required to meet this goal. If this is the case, it's important that everyone in the organization knows this and will pass this information along to the people being asked to support the project. The great thing about the Pie Peddler Fundraising Plan is that multiple sales can be conducted. Since the product is consumable there is little chance for market saturation. Pie is a commodity that is purchased many times during the year. With a little planning, these subsequent sales can provide very high returns.

The same supporters who purchased before will in most cases purchase again. After having an initial sale, the volume can be projected to additional sales with far greater accuracy. You will have a better understanding of the potential earnings of each successive sale.

By keeping the individual order forms, if additional fundraising events are needed these forms should be used to approach the supporters who purchased the products previously. By utilizing these lists you will gain a tremendous advantage in early sales as a result. Your efforts will be even more productive that the original event as more time can be used to cultivate even more supporters. Keeping track of these original customer orders should be handled just like money. They are a valuable resource. If you have someone within you organization that is proficient with a computer, you should enlist their help in setting up a database for the access of these names.

Once you have a database of information about the people who supported your previous fundraiser you can offer such thing as newsletters or personal invitations to other events. This will help keep your organization and the good work you do in the minds of those who helped you.

Once your fundraiser starts to produce some income, use a visual aid to display how close you are to a desired

financial goal. This will help everyone focus on the progress of the fundraiser. Some visual aid suggestions are a thermometer, speedometer, jar of jelly beans, water glass, or any other fun, visual aid that keeps everyone's eye on the goal.

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### ***Establish Event Dates***

You will work with your Pie Peddler Representative to establish a Delivery Date, your organization will need to establish dates for the following list of events:

- . Pie Peddler presentation
- . Order delivery date
- . Orders to be turned into Pie Peddler (always 7 days prior to delivery date)
- . Training dates
- . Fundraiser Kick Off
- . End of Event Celebration

It is advisable to stay away from holiday and national celebration days, these tend to be crowded by other activities and limit the potential of the fundraiser. The school calendar should be consulted, as some volunteers will not be available during "spring breaks" or vacations.

Plan your activities when your numbers will be the strongest, not when you think the market is right. It has been our experience that volunteers make the difference not the calendar.

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### ***Plan Event Kick Off***

The organization should pick a date and provide a special event kickoff celebration. This need not be lavish or costly, but should be a program consistent with the organizations practices that lets everyone involved know that the program is officially underway.

By letting some of the local media know of your goal and the date and time of the kick off, they will sometimes send a person to cover the event. Don't be shy, send letters to the local newspaper, radio & television stations, remember they are looking for stories to pass along to the public so let them know about your project. Don't forget to use the three sentences to explain exactly why your event is important to the community. This is a great way to let people know of your project. Be sure to provide a contact person's name and phone number, in case someone watching or listening would like to support your cause.

Plan for some one to give a pep talk to the group. It may be desirable to get a guest speaker to give the pep talk to the volunteers. This is inspiring and at the same time explains the correct message of community service.

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### ***Event Publicity***

Have you ever wondered why are there so many commercials on television, radio, newspaper, billboards, buses, taxicabs and almost everywhere you look? Because the businesses that purchase this advertising know one thing. IT WORKS! So take a lesson here, it pays to advertise. While the kind of advertising we just referenced is very expensive you can advertise your fundraising event with very little cost. With just a little planning, you will be able to effectively get the word out about your groups plans and dates for the roll out of your fundraiser.

Here are some examples of how you can use advertising in a very cost effective way.

- . Phone Solicitations
- . Letters or Postcards
- . Flyers
- . Posters
- . Press Releases
- . Roadside Signs
- . Bulletin Boards
- . Newspaper Coverage
- . Public Service Announcements on Television & Radio
- . Email
- . Church Bulletins

All of the above should be used to some extent in your effort to get the word out. When planning for publicity give your group enough time to properly execute these suggestions. Plan and get permissions for the placement of posters, signs and bulletin board use. Use your group to gather email addresses and compose your message using the three sentences as previously discussed.

There are a great many ways to get the word out, the more you plan your group's publicity in advance of your fundraising event the easier the event will become. Remember, people want to help, they just need to know when and where.

Most of all, have fun, be creative with your advertising, I'll bet you remember some of your favorite ads, so will your supporters.

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### ***Personnel Requirements***

Having enough people participate makes all of the fundraising tasks go more smoothly. Start to enlist help as soon as the fundraising activity is planned. It helps to have a sign up sheet with each of the duties listed we have provided in this video so volunteers can select the activity that best suits their individual skills and talents.

If you are the person in charge of fundraising within your organization, before a fundraising activity is planned, start to gather data about the skills and talents of others in the organization. This will give you a head start on who to contact for a specific skill.

Remember that everyone in the group is already busy. People who enjoy helping others will always be busy as they find tasks that need to be done. These are not folks who enjoy taking things easy so be cognizant of the time they are donating. Keep tasks short; be sure to communicate exactly how long the project will last and exactly what is expected of each duty. Keep to the plan.

Personnel will be required to fill the event tasks covered in this training guide

- Planning and/or Event Management
- Publicity
- Training
- Event Kick off & Event Completion Celebrations
- Distribution Management
- Customer Contact

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### ***Training***

We can't stress this enough, training is a key component to your fundraising efforts. If you have experienced less than desirable outcomes on previous fundraising attempts it could well be because this key ingredient is missing from your efforts. When you think about it, it makes sense that if the volunteers who contact customers carry different ideas about the group's goals then the message they are delivering is not very powerful or compelling.

Imagine that you are in a group meeting and the speaker says, "We're selling pies to pay for band uniforms, please see Mrs. Smith for order forms that show the pies we are selling and the prices. I expect everyone to get behind this and do your best. The order forms must be in no later than next Friday". Maybe you have heard this before; it is a common way for most fundraisers to begin. The result of this fundraising effort will be what you would expect, some of the people will really get behind it and promote the cause, but in most cases the order forms will come back with the same content as when they were given.

In this example, where was the goal of each individual provided? What message do you think that the participants will give to people they contact? What is the driving force behind participation? I think you are now more aware of the critical nature of training. If you follow the guidelines we present and promote the training of your volunteers you will see much greater participation of volunteers and subsequently much higher sales.

Set dates for training and watching the presentation. Inform the organization well in advance of these training dates. Make sure you have prepared the three sentences and be ready to answer the "5 Whys". To learn more about the 5 Whys watch the Personal Recommendations for Success portion of this guide. Keep the training events fun and review the team building skills presented in the Team Building section of this presentation.

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### ***Event Kick Off***

Here is where the plans you have previously made pay off. It's your fundraising event kick off day and everyone is excited, the media attends as you have been promoting your group's intent to fundraise for some time. Everyone involved is having a great time. Now is a good opportunity to inform the media about your worthwhile goals. Don't forget to use the three sentences in describing your goals.

Take time to distribute the materials to all of the volunteers, be sure you communicate the pie price your organization has decided upon and provide the three sentences on 3" x 5" cards. Take whatever time is necessary to give any other instructions on the goal or safety in fundraising practices. Provide reminders about event dates and personnel responsible for collecting the order forms. Remind everyone that orders must be placed with the Pie Peddler 7 days prior to the delivery date.

Have someone give a pep talk to get everyone inspired. Your speaker could be a well-known personality not associated with your organization. It's always good to hear inspiring anecdotes from someone who has participated in similar situations.

Take time to point out the measurement graphics you have created to gauge your success. Indicate where these visual aids will be posted and when they will be updated.

It can't be reinforced enough, HAVE FUN! This is a fun time where all of the preparation takes shape, so enjoy yourselves, you've earned it.

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### ***Event Management***

Someone or a team of people will need to be in a position of overall management, overseeing task completion dates, personnel requirements, keeping watch on committees, answering questions and provide direction. Event management will be required to keep all members informed about changes of plans or when additional information must be gathered or distributed to the group.

Event management should also look at the big picture and determine the ROI (Return on Investment) of the fundraising activity. This calculation addresses the amount of labor hours taken to stage, promote and execute the event divided by the dollars received to derive a per hour investment figure. We believe you will find that the Pie Peddler program has a better ROI because of the training and simplicity of the program. These factors have proven to help speed task completion and thereby reduce the number of hours required by the volunteers of the organization.

Event management should also evaluate the "ease of participation" of this fundraising effort compared to others. Product Quality should also be evaluated to insure that your supporters are getting value for their contribution.

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### ***Distribution Management***

The delivery day is a very busy time; here is a sequential list of events that take place on delivery day:

- Set up location for the Pie Peddler to unload and sort the product.
  - This location should have easy access with no stairs if possible. (Many accidents happen when volunteers carry the product on stairs, avoid this situation if possible)
  - The location should be in a cool dry area.
  - Tables are preferred as sorting of the product is easier if kept at counter level.
  - The area should be well lighted.
- Select a person to work with the Pie Peddler Representative(s) to verify product delivery quantities.
- The Pie Peddler Representative(s) will handle the unloading and delivery of the product; the cartons will be sorted by flavor first. (Please be sure that the unloading and sorting of the product is completed before any of the cartons are opened, this will insure accurate accounting of correct received quantities).
- Both the organizations representative and the Pie Peddler representative check the delivered quantities.
- The organizations representative signs the Receiving Documents. <
- Plan for other organization members to arrive to help sort the pies into individual customer orders, by contacting member.
- Remove the pies from the cartons. (Care must be taken to keep the pies level during this process) <
- Schedule the contacting members a time slot to pick up their individual orders. (Scheduling of the pick up times will keep the number of personnel and confusion to a minimum in the delivery area).
- Insure everyone's order is complete and correct before the product is released.
- Reinforce the need to deliver the product ASAP! Do not condone putting off delivery. (Putting off delivery of the product dose not give your supporters the freshest pie that can be obtained, keep the level of quality high completely through the delivery process).
- Clean up the area after the distribution process. (You may wish to schedule additional personnel to this task).

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### ***End of Event Celebration***

Congratulations! You have made and executed your plans, your organization has performed flawlessly and you made your financial goal a reality. Time to celebrate!

Plan your Celebration Event so as many members can attend as possible. Ideas for the event range from a "Pot luck" dinner to just an impromptu get together and anything in between. The important idea is to bring closure to the event and make everyone feel special about his or her participation. Extending this thank you to your members is very important and is frequently overlooked.

This is a good time to recognize personal achievement. Recognition is important and need not be monetary, as we have previously stated, recognize the effort and the result it made to the goal. Take pictures of the high performers; establish a "wall of fame" for these individuals. Give attention to individual performers but don't reward prizes for these top performers. Provide recognition to be sure but the reality is, all the effort is to help the group achieve the goal not the individual. In fact greater satisfaction comes with helping the group to win rather than financial rewards to the individual.

Take pictures of all who attend and make a wall poster of the pictures from the event. Have fun, you deserve it. You have made a significant and important step in helping our community.

Thank you for watching the Organizational Recommendations for Success portion of this Training Guide, we hope that you will be able to use some of the material and ideas we have presented. If you would like additional training information or have questions about the program, please call 888-289-7437 or 937-376-1082 and a representative will be happy to answer any of your questions.