



# A Treasurer's How-To

## Plan, Complete, and Report a Fundraiser

## Plan

1. Familiarize yourself with the limits and boundaries of your fundraiser due to rules, laws, and available funds.

- Lotteries, raffles, drawings, or games of chance are not allowed when trying to raise funds.
- Consult your school administration for any information they need to carry out a fundraiser and for any policies they have that restrict fundraising.
- Be aware of any initial costs your fundraiser may have. For example, you must have funds available to purchase T-shirts before selling them, but you probably do not need initial funds to give a hug for 25¢.
- Refer to Section 2 of "Fund-raising, finances, and charitable giving" found [here](#) for more information.

2. Think of a plausible fundraising idea that you think might be successful if used.

- If you ever run out of ideas, the Internet is a great source for fundraising ideas. Be sure to tweak the idea to make it fresh and original.
- Refer to "Fundraising Projects" found [here](#) and "Seasons of Fundraising" found [here](#) for ideas.

3. Write down the 5 W's and other information that describes your idea.

- If you find it hard to complete this chart, you might not be able to make this fundraiser possible.
- Refer to Section 3 of "Fund-raising, finances, and charitable giving" found [here](#) for more information.
- Refer to the *5 W's and Other Information* section of this guide for more information.

4. Share your idea with others and obtain their opinions and approval.

- Refine your fundraising idea to make sure it is perfect and to obtain approval from board members, advisors, school administration, and other necessary parties.

5. [Optional] Complete the following checklist.

- Does your fundraiser comply with all rules and regulations?
- Did you get the permission of all necessary parties to hold your fundraiser?



# Complete

## 1. Obtain all materials and approval necessary for your fundraiser.

- Examples include T-shirts, wristbands, approval to fundraise in a location (if applicable), and more.

## 2. Publicize your fundraiser.

- Examples include the use of social media, flyers, e-mail reminders, and more.

## 3. Set up your fundraiser as early as possible.

- Examples include booths, stands, decorations, and more.

## 4. Complete your fundraiser and donate the profits to charity.

- Remember to get a proof before donating any money. A proof confirms that the profits were actually donated to charity.
- Remember to follow all school rules when depositing and donating money.

## 5. [Optional] Complete the following checklist.

- Did you obtain all materials required for the fundraiser?
- Did you donate the profits to your said charity?



# Report

## 1. Submit a Fundraising Report Form online.

- The link to the Online FRF Submission can be found [here](#).
- Fill in all necessary information correctly. Do not guess. Instead, ask your District Treasurer or other Club Treasurers for help.
- You should receive an automated confirmation email.

## 2. Submit a proof through e-mail or paper mail.

- Examples of a proof include a copy of the donated check, a screenshot of the online donation page, or a thank-you letter from the organization.
- The proof should have the name of the club, the name of the organization, and the amount donated.
- Confirm with your District Treasurer that the proof is acceptable.
- Ask your District Treasurer for an e-mail address or a mailing address to send the proof.

## 3. [Optional] Complete the following checklist.

- Did you fill out an FRF?
- Did you send in a proof?
- Did your District Treasurer receive the FRF and proof?



# 5 W's and Other Information

## Who

- Who is the primary group of people that will participate in your fundraiser? Children? Adults? Non-Key Clubbers? Everyone?

## What

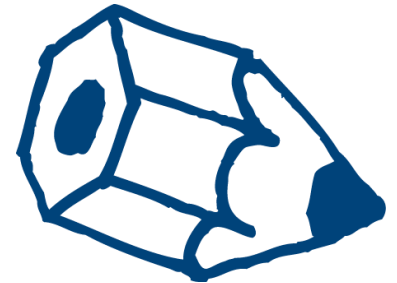
- What is the idea? A candy cane sale? A carnival? A movie night?

## When

- When will your fundraiser take place? Be sure to have enough time to plan your fundraiser so that you do not start it rushed and unprepared.
- How long will the fundraiser last? Make sure your fundraiser does not last too long, because it might drop in popularity.

## Where

- Where will your fundraiser take place? Try to hold your fundraiser in a place easy for your group of participants to get to.



## Why

- Why are you raising funds? Be honest about where the money is going.

## Other

- What are other important details of your fundraiser not previously mentioned?
- How much money do you plan to earn? Set a high, but realistic goal so that members are motivated to achieve it. For example, do not expect to raise \$10,000 by selling lollipops to your class of 25 students.
- Is your fundraiser themed? Hold your fundraiser close to the most relevant holiday or season. For example, hold a Water Balloon Toss in the Summer, not in the Winter.
- Is there an incentive? A party for raising a certain amount of money by a certain date may help you achieve your fundraising goal.

## Last Notes

After thoroughly perusing this guide, feel free to contact your District Treasurer if you have any questions, comments, or concerns. Good luck with your fundraiser and make sure to have fun!



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Service Leadership Programs

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