

FUNDRAISING CHECKLIST

Other important points to consider as you meet with fundraising companies.

- What is the turn-around time for replacing incorrect or damaged shipments?
- Will out-of-stock items be back-ordered or will substitutions be made? How quickly?
- What are the terms for payment?
- What is the return policy for unsold products?

Ask for and check references.

Here are some questions to ask.

- Did the company deliver on promises?
- Did the school or group reach its goal?
- Would the group work with the company or its representative again?

NOTES:

Information in this brochure has been approved by the National Association of Secondary School Principals and the National Catholic Educational Association.

The Association of Fund-Raising Distributors & Suppliers is an international association of more than 600 companies that provide products and services to non-profit organizations to assist them in their fundraising programs. AFRDS and its members – authors of the industry's first and only Code of Ethics and Standards for Professional Practice – are dedicated to promoting professionalism and integrity in product fundraising. For a list of members offering products and services in your state, write:

AFRDS

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Fundraising Checklist

A Tool for Evaluating Fund-Raising Companies

Courtesy of Members of the Association of Fund-Raising Distributors & Suppliers



FUNDRAISING CHECKLIST

A Tool for Evaluating Fundraising Companies

LIST CANDIDATE COMPANIES:

A wide variety of programs, products and services are available in product fundraising today. Use this checklist to compare fundraising companies and make an informed decision. Please note: not all of the criteria may apply to your organization's needs.

A. RATE THE FOLLOWING ON A SCALE OF 1 - 5 (with 5 = excellent and 1 = poor) or NA for not applicable.

- Product quality
- Product retail prices (i.e. Do prices represent a fair value for consumers?)
- Incentive/prize program appropriateness/quality
- Caliber of company materials, brochures, promotional materials
- Professionalism of company representative*
- Educational value to students/volunteers (example: enhances presentation skills)

B. PROVIDE A NUMERICAL RESPONSE TO THE FOLLOWING QUESTIONS.

- Number of years company has been in the fundraising business
- Number of years representative has been in the fundraising business *
- What are the projected total net profits to your organization?

C. USE A CHECK MARK (✓) IF THE FOLLOWING SERVICES ARE INCLUDED IN THE COST OF THE PROGRAM. Use a plus sign (+) if the service is available, but costs extra. Use NA if the service is not applicable or available.

- Organization*
- Order form tallying
 - Individual orders separated per classroom
 - Products pre-packaged per student
 - Computerized printout itemizing student sales
 - Instructions for record-keeping and other logistics
 - Freight/Shipping

- Communication/Promotional Tools*
- Kick-off assembly presentation and/or video
 - Poster, product display
 - Parent letter
 - Take-home packets
 - Incentive or prize program

D. THE FOLLOWING QUESTIONS SHOULD BE ANSWERED WITH A (Y) FOR "YES" OR (N) FOR "NO."

- Are product samples available?
- Is the company a member of the Association of Fund-Raising Distributors & Suppliers?
- Does the company understand and comply with your state sales tax requirements?
- Is a company representative accessible, day and night?
- Does the program stress child safety and adult supervision?

* May not apply when evaluating mail order/catalog companies and programs.