

Basic Fundraising Checklist



This checklist is designed to help you or your organization establish basic tools, resources and materials needed for a successful fundraising experience. For best results please consider the following **BEFORE** you begin your fundraising efforts.



1. Do you have a fundraising committee (staff)? Yes No

Establish a committee of **a minimum of (5)** individuals willing to commit their time and effort through to completion of your fundraiser event.

- a. **1st** Member

(Name): _____

(Phone): _____

(Email): _____

- b. **2nd** Member

(Name): _____

(Phone): _____

(Email): _____



c. 3rd Member
(Name): _____
(Phone): _____
(Email): _____

d. 4th Member
(Name): _____
(Phone): _____
(Email): _____

e. 5th Member
(Name): _____
(Phone): _____
(Email): _____



2. Do you have an organizational website? Yes No

A website will allow you to present your organization and purpose for the fundraiser event. Additionally, you can attach social media tools to your website for the purpose of supporting your cause and responding to your supporters.

a. Organization (website): _____

b. Contact Information: (Address or Fundraiser location): _____





3. Is your organization established as a “non-profit” status organization? Yes No

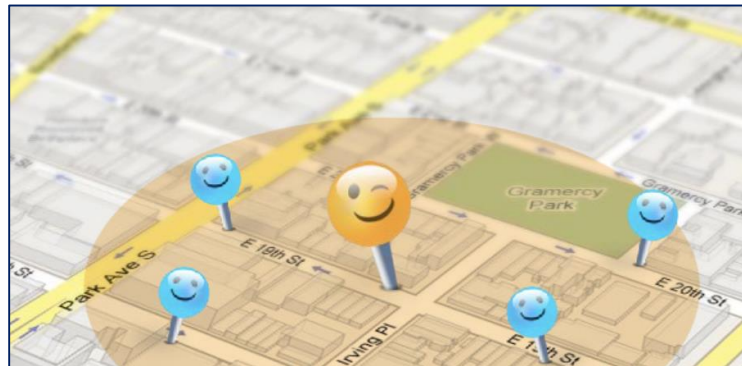
It is not a requirement to be a “non-profit” to participate in a fundraising opportunity. The key is to disclose your organizations’ status to your supporters upfront. Additionally, familiarize your organization with any IRS related “tax” requirements based on your specific status.

Business Entity (Status): _____

Registered Owner/Name: _____

(Phone): _____

(Email): _____



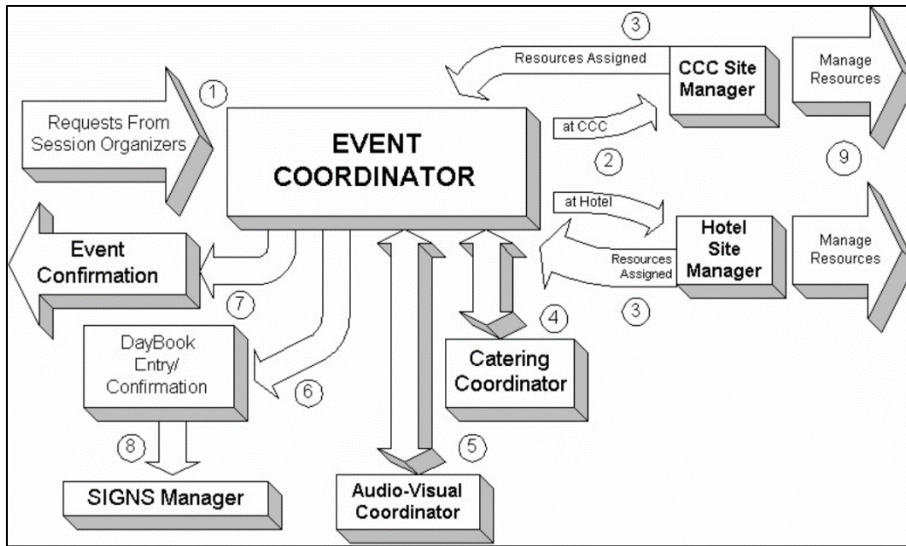
4. Do you have a physical location that has a consistent flow of people traffic to conduct workshop(s) display item(s)?
Yes No

All fundraisers will require a flow of people traffic both physically and via social media resources such as Facebook, Twitter, Email and your organizations’ website. Utilize your committee staff to leverage support via partnership(s) with community resources such as:

- a. Parent Teacher Associations (PTA)
- b. Religious Institutions
- c. Local Youth Club(s) & Sports Teams
- d. Community Outreach Center(s)
- e. Local College Fraternities and non-profit organizations



Keep in mind, you can include efforts and pledge a portion of the generated proceeds to the organization that partnership with your efforts. Simply task utilize your established fundraiser committee to establish and accomplish networking efforts.



5. Do you have a Fundraiser Event Coordinator? Yes No

Establish Fundraiser Event Coordinator(s). Establish **a minimum of (2)** Event Coordinators. Prepare a complete checklist of responsibilities for your event coordinator. **(Provide the checklist at least 7 business days prior to the event).**

The coordinator will be in direct contact with the fundraiser sponsor(s). Additionally, the coordinator will be responsible for communicating and coordinating the location, setup, start time, end time and clean-up of your fundraiser event.

(1st) Coordinator Information:

(Name): _____
 (Phone): _____
 (Email): _____
 Event Date: _____

(2nd) Coordinator Information:

(Name): _____
 (Phone): _____
 (Email): _____
 Event Date: _____

Coordinator Arrival (to the event Location) time: _____

Event Start Time: _____

Event End Time: _____

Fundraiser Sponsor(s) Arrival (to the event Location) time: _____

Event Start Time: _____

Event End Time: _____





6. Do you currently have existing fundraising support or partnership(s) with other organizations in your community?
Yes No

It is not a requirement however, it is highly recommended to establish a minimum of (2) supporting organizations prior to beginning your fundraising efforts. Leverage the efforts of your fundraising committee to accomplish this task. If you are utilizing one of our fundraising concepts (MSK-P2P Enterprises); review and implement the proven networking strategies found in the information you received in your “package” information.

- a. (1st) Event Coordinator: _____
(Phone): _____
(Email): _____
Event Date: _____
Organization (website): _____

- b. (Address of Fundraiser location): _____

- a. (2nd) Event Coordinator: _____
(Phone): _____
(Email): _____
Event Date: _____
Organization (website): _____

- b. (Address of Fundraiser location): _____





7. Does your organization have teacher(s)/facilitators willing to volunteer their time to teach others?

Yes No

The purpose of acquiring a **minimum of (4)** facilitator(s) is to add professionalism to presenting your fundraising opportunity to various resources. Additionally, they can effectively present your fundraising efforts amongst their community and volunteer to conduct workshop(s) on your organizations' behalf. It is highly recommended to compensate the facilitator (using a portion of the generated proceeds) for their time if they are conducting workshop(s) for your organization.

a. **(1st)** Facilitator/Teacher

(Name): _____
(Phone): _____
(Email): _____

b. **(2nd)** Facilitator/Teacher

(Name): _____
(Phone): _____
(Email): _____

c. **(3rd)** Facilitator/Teacher

(Name): _____
(Phone): _____
(Email): _____

d. **(4th)** Facilitator/Teacher

(Name): _____
(Phone): _____
(Email): _____

e. **(5th)** Facilitator/Teacher

(Name): _____
(Phone): _____
(Email): _____





8. Does your organization have the following basic (portable) supplies/Tools/Resources available for conducting a workshop?
 Yes No

The checklist below indicates the minimum item(s) you will need. Create your own checklist prior to the fundraiser event.

- a. Laptop with mobile internet accessibility Yes No
- b. Projector & Portable Screen Yes No
- c. Display Table(s) & Flyer Display(s) Yes No
- d. Cash Box Yes No
- e. Coffee/Tea (supplies & Setup) Yes No
- f. Light refreshment(s) (supplies and Setup) Yes No
- g. Pencil(s)/Pen(s) & Highlighter(s) for general use Yes No
- h. Printed Material(s) available at the workshop(s) Yes No

This checklist provides general tools and resources for a successful fundraiser event experience however, it is still crucial that your organization add all the additional elements specific to your resources.

