Fundraising Procedures

I. OBJECTIVES AND RESPONSIBILITIES

The objective of this committee is to raise funds for the chapter based on the profit plan in the annual budget by planning and executing the chapter fundraiser.

The major responsibilities of the committee manager are planning committee activities, marketing the event (including website), managing logistics and controlling finances.

II. ORGANIZATION

The Committee Manager reports to the Vice President of Community Outreach and Fundraising.

III. GUIDELINES

- Meet with former manager to obtain prior year records, and to discuss duties and responsibilities
- Meet with Vice President of Community Outreach and Fundraising to review budget and BOD objectives for fundraising
- Submit committee meeting minutes to Vice President of Community Outreach and Fundraising
- Submit monthly committee report

IV. PROCEDURES

- Recruit committee members; establish meeting schedule and location
- Review fundraising budget; develop financial plan and fundraiser to be done
- Finalize Planning Worksheet (Attachment A) tasks; assign responsibilities
- Select fundraising date options
- Research venues; obtain proposals
- Select venue; negotiate contract; submit to President for signature
- Launch and test website, registration process and database
- Develop marketing plan; produce flyers, posters and slide show (if applicable)
- Compile list of potential sponsors (companies and individuals)
- Draft Call Script and make call assignments
- Finalize catering
- Design signage and plan production
- Plan fundraiser contests and prize needs (if applicable).
Fundraising Procedures

• Maintain Sponsor/Participant/Donor spreadsheet (Attachment B) of potential, committed and paid participants.
• Plan onsite registration process and team.
• Finalize Fundraiser Logistics Checklist (Attachment C).
• Compile donated prizes; purchase needed additional prizes.
• Stuff "goody bags" (if applicable); prepare for fundraiser day.
• Manage fundraiser day logistics and award banquet (if applicable).
• Collect any outstanding receivables; prepare final financial report.
• Provide input for next year’s fundraiser, and recommendations for fundraiser planning.

V. FINANCIAL

All funds received from an ARMA Houston Chapter-sponsored event or project should be turned in to the ARMA Houston Chapter Treasurer for handling. Under no circumstances are ARMA Houston Chapter VP’s, Committee Managers, or Committee Members authorized to split, disburse, or retain monies for expenses incurred out of the funds collected from an ARMA Houston Chapter-sponsored event or project. The ARMA Houston Chapter Treasurer, upon the presentation of a completed check request form and receipt, should pay all expenses from an ARMA Houston Chapter-sponsored event or project.

VI. TIMELINE OF EVENTS

9 months  Begin recruiting and planning fundraiser
8 months  Announce fundraiser details to the board
7 months  Begin planning the logistics and tasks; draft website
6 months  Obtain contracts for review and approval and begin marketing for sponsors
5 months  Begin marketing to participants

VII. ATTACHMENTS

A. Fundraiser Planning Worksheet
B. Sponsor/Player/Donor Spreadsheet
C. Fundraiser Logistics Checklist