



Fundraising Program Planner

As you begin your planning process, **SchoolBates** wants to help you be successful with this powerful program in every way possible. We have included not only **SchoolBates** specific items but proven, time tested fundraising principles that will help everyone in your organization rally around the cause and become avid SchoolBates supporters!

The SchoolBates Way:

- Fundraising All Year
- Fewer Hours & More Money
- Stores Handle The Product Delivery
- Better Prices For Shoppers
- Significant Funding

Step 1: Let's set some goals:

He who aims at nothing always hits his mark.
-- Anonymous

While raising capital for your school may seem to be your goal, it is typically the required action to meet a need or fulfill a vision of a project that will when achieved make you school a better place for the students, teachers and administration. So to set your goal, it is important to answer the following question: What will be the tangible, visible result of raising these funds?

As you consider that question, it is important to understand that people, by nature, love to see the result of works of which they have been a part. Therefore, you may consider program goals such as:

- ✓ New Computers or a Upgrading the Computer Lab
- ✓ Playground Equipment
- ✓ Extracurricular Programs (Sports Gear, Musical Instruments, etc)
- ✓ Computer Software or Computer Software Upgrades
- ✓ Facility Needs (New Desks, Upgrading Common Areas)

What is our goal for the SchoolBates program?
 (Remember to make it a tangible result to benefit your school)

How much money will we need to earn through SchoolBates to achieve our goal?

\$ _____



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The beginning is the most important part of the work.
-- Plato

Step 2: Set up a promotion plan:

By setting up a promotion plan, we can keep the goal and our progress in front of people on a periodic basis. This process will reinforce the SchoolBates usage by the supporters of your organization and also serve as a gentle reminder at key times throughout the school year. Now that we have our goal statement and financial requirement to achieve that goal for our school, take just a few minutes and personalize the presentation provided by **SchoolBates** for your use in kicking off the program.

Updates to Personalize the PowerPoint Provided By SchoolBates

- Insert our school and organization information on the first slide
- Insert our school, goal and dollar amount required on slide #2
- Update the last slide with our school and organization information to facilitate a very easy registration process for all

ⓘ Remember the last slide of the presentation makes the ideal step-by-step registration hand out for everyone!

Now that we have down what our goals are and a very easy way to communicate it, we need to set the times and events throughout the year where we will speak about **SchoolBates** to introduce the program, encourage use, share special promotions, and provide updates on our progress

Event	Date	Event	Date	Event	Date
<input type="checkbox"/> <u>Back to School Night</u>	_____	<input type="checkbox"/> _____	_____	<input type="checkbox"/> _____	_____
<input type="checkbox"/> <u>Meet the Teachers</u>	_____	<input type="checkbox"/> _____	_____	<input type="checkbox"/> _____	_____
<input type="checkbox"/> <u>Fall Carnival</u>	_____	<input type="checkbox"/> _____	_____	<input type="checkbox"/> _____	_____
<input type="checkbox"/> _____	_____	<input type="checkbox"/> _____	_____	<input type="checkbox"/> _____	_____



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Here are some ideas for promotion at events:

Back to School Night

Promote **SchoolBates** in the opening session of your meeting and ask parents to go by the computer lab or classrooms to sign up on-line!

- Have the instruction sheet provided in the overview presentation by each computer in the computer lab or classroom-- it's so quick and easy that you will sign up dozens of supporters on the spot!
- Ask your teachers to help promote **SchoolBates** to parents during classroom time -- make sure you have forms in each classroom!

New Student Registration / Before School Mailing to Parents

Include **SchoolBates** overview flyer in your back to school packets or mailing of class schedules! A great way to include new families!

Meet the Teacher

Ask your teachers to help promote **SchoolBates** to parents during the time they are presenting to parents in their classrooms -- make sure you have forms in each classroom!

General Membership/PTF/PTO/PTA Meetings

These events are great opportunities to reach all parents to help increase your supporter base and to remind those that have already registered that there is a better reason to shop online than ever before – our children.

Family Movie Night

A great way to bring families together and build our school family! Make a little popcorn ask everyone to bring their sodas or lemonade and enjoy time together watching a movie in your gym, multi-purpose room or at a parents's home. And make sure that everyone has a chance to sign up for **SchoolBates** rather than watching the movie previews!

Without promotion something terrible happens –
Nothing!

-- P.T. Barnum

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Gentle Reminders: Flyers, School Communications, and Email

In addition to sharing about **SchoolBates** at school functions, we should try to provide gentle reminders to keep the opportunity to help our school by providing scheduled communication to our supporters at key times during the school year and during more active shopping seasons. The tables below provide planning assistance in selecting the communication options and remember **SchoolBates** provide all of these items in a generic form and ready to go.

I'll Use this Flyer	I'll Use this Email	Send It By:	Focus	Flyer Name(s)	Email Template(s)
<input type="checkbox"/>	<input type="checkbox"/>	Aug 15 – Sept 15	Back to School		
<input type="checkbox"/>	<input type="checkbox"/>	September 30	Fall Festival		
<input type="checkbox"/>	<input type="checkbox"/>	3 Wks Before Homecoming	Homecoming		
<input type="checkbox"/>	<input type="checkbox"/>	October 10	Fall Harvest / Halloween		
<input type="checkbox"/>	<input type="checkbox"/>	October 25	Holiday #1 – Online Shopping		
<input type="checkbox"/>	<input type="checkbox"/>	November 15	Holiday #2 – Holiday Shopping		
<input type="checkbox"/>	<input type="checkbox"/>	December 10	Holiday #3 – Last Minute Gifts		
<input type="checkbox"/>	<input type="checkbox"/>	January 5	Post Holiday – Get the gifts you didn't get/ spend your gift cards online		
<input type="checkbox"/>	<input type="checkbox"/>	January 27	Valentine's Day		
<input type="checkbox"/>	<input type="checkbox"/>	February 21	Can't wait til Spring Break		
<input type="checkbox"/>	<input type="checkbox"/>	March 10	Prepping for the Prom Night		
<input type="checkbox"/>	<input type="checkbox"/>	March 15	Easter and Planning Summer Travel		
<input type="checkbox"/>	<input type="checkbox"/>	April 21	Mother's Day		
<input type="checkbox"/>	<input type="checkbox"/>	May 1	Graduation and Teacher Appreciation		
<input type="checkbox"/>	<input type="checkbox"/>	May 21	Father's Day		
<input type="checkbox"/>	<input type="checkbox"/>	May 31	Time for Summer Vacation		
<input type="checkbox"/>	<input type="checkbox"/>	June 15	Summer Fun and Travel		
<input type="checkbox"/>	<input type="checkbox"/>	July 25	Summer's Last Fling & Planning for Back to School		



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Constant Reminders: Mentions in School Communications and Link from School Website

From marketing research over the years, we know scientifically that having gentle constant reminders in front of people will help them to take an action or maintain actions that they have already started. Therefore, you may wish to include small amounts of information about **SchoolBates** in a number of communications from the school with parents and supporters at key times during the school year and during more active shopping seasons. The tables below provide planning assistance in selecting the communication options and remember **SchoolBates** provide all of these items in a generic form and ready to go.

Duty makes us do things well, but love makes us do them beautifully.
 -- Zig Ziglar

I'll Use This One	Constant Reminder Options	Resource from SchoolBates
<input type="checkbox"/>	Small School Newsletter Insert	
<input type="checkbox"/>	Large School Newsletter Insert	
<input type="checkbox"/>	16x20 Bulletin Board Posters	
<input type="checkbox"/>	WebSite Link for our school website	
<input type="checkbox"/>	Holiday #1 – Online Shopping	
<input type="checkbox"/>	Holiday #2 – Holiday Shopping	
<input type="checkbox"/>	Holiday #3 – Last Minute Gifts	
<input type="checkbox"/>	Post Holiday – Get the gifts you didn't get/ spend your gift cards online	



What can we achieve working as a team?

Number of Active Supporters (Parents, Grandparents, Family, Ministration, Alumni & Friends of Your School)	Average Annual Purchases Per Supporter Through SchoolBates	Total School Fundraising Per Year
25	\$3,600	\$90,000
50	\$3,600	\$180,000
75	\$3,600	\$270,000
100	\$3,600	\$360,000
200	\$3,600	\$720,000
500	\$3,600	\$1,800,000

Based upon a portion market average of 5%.



The SchoolBates Way:

- Easy to Use
- Fundraising Year Round
- Fewer Hours & More Money
- Stores Handle The Product Delivery Not Your Volunteers or Staff
- Better Prices For Shoppers
- Significant Funding

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Step 3: Enlist the support of those a few key people:

Okay, are you saying that I need an army of folks? No! In fact with **SchoolBates**, it is quite the opposite. But as you look at getting the initial word out to your organization and have reminders sent, there will be a few key people with whom you will need to work with. So let's make a list of them and when and how we will plan to contact them in the next couple weeks.

Here are the common contact points that probably would be valuable to discuss the ways in which they can assist in making **SchoolBates** a resounding success. This people include the person(s) who:

- coordinates weekly folders typically in elementary grades
- generates any parent newsletters or updates for your school
- coordinates mailings to you school community
- provide you an email distribution list or will email reminder messages
- responsible for the main bulletin boards in your school facility
- coordinating any events at which you wish to share the **SchoolBates** program
- serves as the webmaster for the school website

Teamwork divides the task and multiplies the success

-- Unknown

If I could solve all problems myself , I would

-- Thomas Edison

(when asked why he had 21 assistants)

Completed	Person to Contact	Their Role in the SchoolBates Program	How/When/Where will I coordinate with them	By What Date Should I Have This Completed
<input type="checkbox"/>				/ /
<input type="checkbox"/>				/ /
<input type="checkbox"/>				/ /
<input type="checkbox"/>				/ /
<input type="checkbox"/>				/ /
<input type="checkbox"/>				

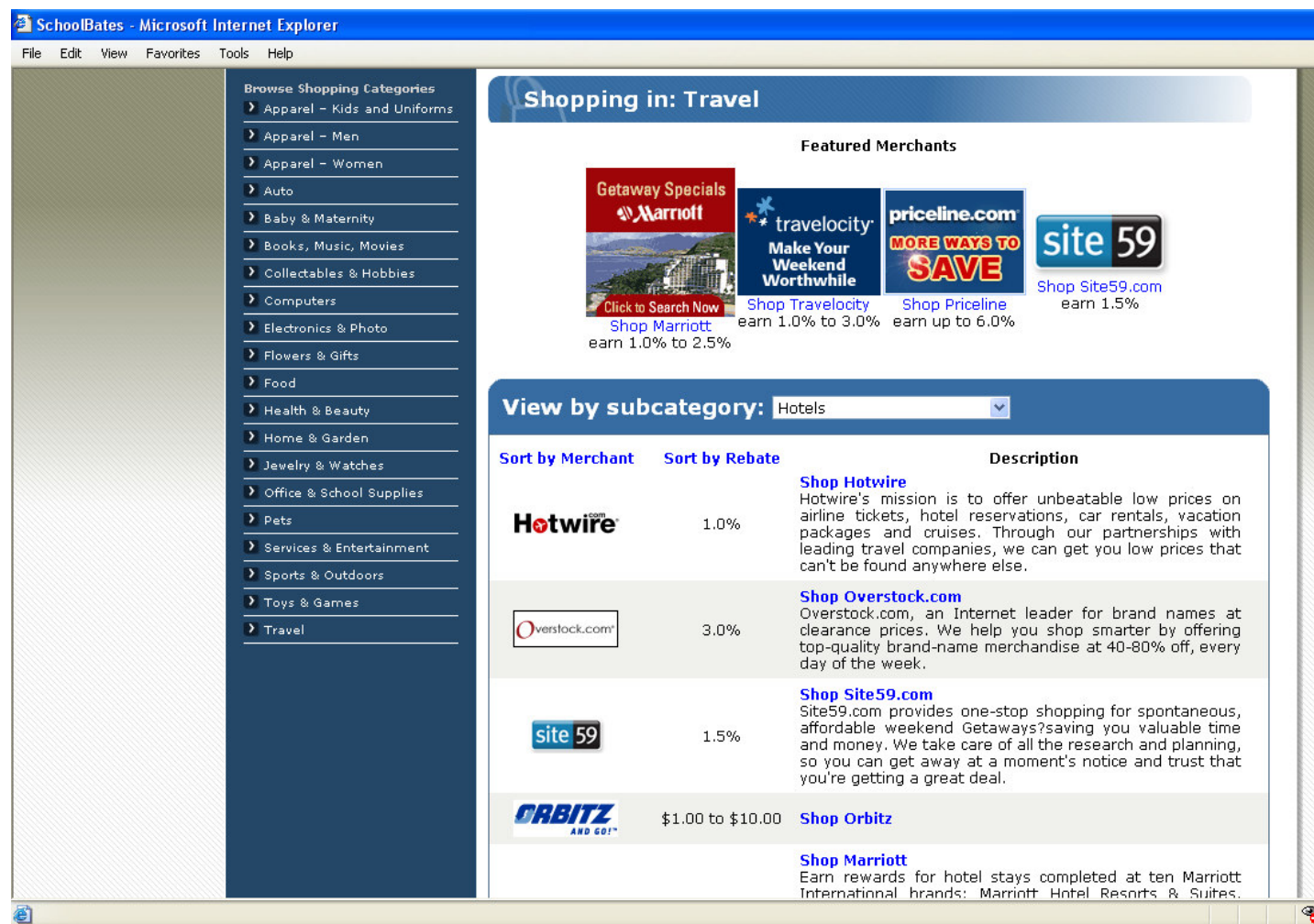
Step 4: Optional Programs for Consideration:

There are a number of programs that you may develop to further enhance your earning potential through **SchoolBates**. While these are not required to be successful, they can provide significant ongoing rewards to your school. Just as with our standard **SchoolBates** program, we will work to provide you everything you need to be successful. And always, we look forward to being your partner in achieving your goals, so if there is anything that you believe that we can provide you or if you develop another program that you think would benefit other schools, please email us at memberservices@schoolbates.com





Travel Consolidation Program:

Throughout the school year many schools have overnight trips for students to compete in academic challenges, to compete athletically, to learn by going on extended field trips and more. If you can harness those travel dollars by booking hotel rooms for those events through the online travel provider of your choice, your school can gain extra rewards.

If your students use 100 room nights a year @ \$109 per night and then supporting parents at these events use another 100 room nights, then at 2.5% your school could add another \$545.00 to your earnings. Now add to that parent business trips and vacations and you can earn well over \$1000 dollars all on money that would be spent anyway.



The screenshot shows the SchoolBates website interface. On the left is a navigation menu with categories like Apparel, Auto, Books, Electronics, etc. The main content area is titled "Shopping in: Travel" and features "Featured Merchants" including Marriott, Travelocity, Priceline, and Site59. Below this is a "View by subcategory" dropdown set to "Hotels" and a table listing merchants with their rebates and descriptions.

Sort by Merchant	Sort by Rebate	Description
	1.0%	Shop Hotwire Hotwire's mission is to offer unbeatable low prices on airline tickets, hotel reservations, car rentals, vacation packages and cruises. Through our partnerships with leading travel companies, we can get you low prices that can't be found anywhere else.
	3.0%	Shop Overstock.com Overstock.com, an Internet leader for brand names at clearance prices. We help you shop smarter by offering top-quality brand-name merchandise at 40-80% off, every day of the week.
	1.5%	Shop Site59.com Site59.com provides one-stop shopping for spontaneous, affordable weekend Getaways?saving you valuable time and money. We take care of all the research and planning, so you can get away at a moment's notice and trust that you're getting a great deal.
	\$1.00 to \$10.00	Shop Orbitz
		Shop Marriott Earn rewards for hotel stays completed at ten Marriott International brands: Marriott Hotel Resorts & Suites.



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Business Leaders Program

Another opportunity to generate significant rewards for your school is to approach small business leaders from service providers, to attorneys, to physicians, and more and let them know how easy it is to earn money for their school by simply moving some of their purchases online through **SchoolBates**.

These business people can make purchases in a number of areas that will provide significant rewards:

- | | | | |
|-------------------|-------------|---------------------|-------------|
| ➤ Office Supplies | up to 4.0% | ➤ Printer Ink | up to 20.0% |
| ➤ Travel | up to 3.0% | ➤ Snacks & Coffee | up to 4.0% |
| ➤ Computers | up to 1.5% | ➤ Furniture | up to 2.5% |
| ➤ Software | up to 10.0% | ➤ Cleaning Supplies | up to 12.0% |

To succeed, jump as quickly
at opportunities as you do
to conclusions
-- Benjamin Franklin

Check back in our Tools for Leaders Section on **SchoolBates** for easy worksheets that you can provide these school & community leaders so they can easily see this opportunity to help a cause they love – their children or grandchildren’s school.

School Business Office Use

What better place to look for ways to make your school’s dollars go further, than with the school business office. This is effectively the same opportunity as the Business Leaders Program but your school can also take advantage of merchant partners for Textbooks and take advantage of educational pricing at merchant like Apple Education and Academic Superstore.

Check back in our Tools for Leaders Section on **SchoolBates** for easy worksheets that you can provide your school business office so they can easily see this opportunity to stretch the school’s budget dollars



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Step 5: Execute your plan:

One wise man once said, there is no time like the present. So the time has come to move from planning to action. Let's review the previous 4 steps and look at each small manageable task and place them on your calendar.

- Always share the goal in tangible terms from Step 1
- Get the events that you are targeting to register your school families and make sure you are on the agenda from Step 2
- Make the few phone calls for touching base with those team members who may be helping you get the word out from Step 3
- Download the resources from **SchoolBates** that you will be using over the next month identified in Step 2
- And remember, you have a better reason to shop – **SchoolBates!**

“The secret of getting ahead is getting started. The secret of getting started is breaking your complex overwhelming tasks into small manageable tasks, and then starting on the first one.”

-- Mark Twain