



FUNDRAISING FOR SCHOOLS ...

WITHOUT THE HEFTY FEES™

Fundraising Guide

Thank you for choosing donations4education.com for your fundraising needs. This document will guide you through setting up and running your fundraiser. If you have any questions, please feel free to contact support@donations4education.com or call 317-742-0220 for assistance.

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Before the fundraiser timeline and task list

At least 4 weeks prior to event

1 Finalize fundraiser settings



~1 hour

Setup Folder

Organization Details
Fundraising Details
Receiving Your Donations
Logo
Upload Student Data
Student Goals
Leaderboards
Student Handouts
Finalize & Approve Proofs
Fundraiser Estimate
Approve
Administrators

2 Order Prizes (Optional)



See prize suggestions for ideas

3 Schedule meeting with the school office



See cash and check donation management for guidance
See review credit card processing options for guidance
Kickoff Event Planning

About 2 weeks prior

4 Announcements



Use the *Email Portal* feature to send the *Announcement* email to teachers. The teacher templates should be updated with the cash and check handling plan decided upon with the school office.

Use the *Email Portal* feature to send the *Announcement* email to parents.

5 Student Handouts



Donations4Education will print and ship your student handouts sorted by teacher name and student name for easy distribution. For reading-thon events, bookmarks will also be printed and shipped.

About 3 days prior

6 Welcome to teachers



Use the *Email Portal* feature to send the *Welcome* email to teachers. This will give teachers instructions to distribute the handouts on the start date.

Fundraiser Kickoff Day

7 Teachers distribute handouts to students, Kickoff Event (Optional)



Teachers distribute donations handouts to each student. For reading-thon events, bookmarks should also be given out.

You may wish to send teachers another reminder to send home the donation handouts.

8 Kickoff Event

Host a kickoff event to get staff, teachers and students excited for the fundraiser.

9 Welcome to parents



Use the *Email Portal* feature to send the *Welcome* email to parents.

During the fundraiser timeline and task list

Daily

1 Fundraiser Promotion



Use the *Email Portal* feature to send the *Status Template* email to parents and teachers.



Use social media to further promote your fundraiser.

2 Record Donations



Using the cash and check donation plan and record donation envelopes using the *Add Cash/Check Donations* feature.

Last day

3 Reminder Emails



Use the *Email Portal* feature to send the *Last Day Template* email to teachers and parents.

After the event

4 Prizes



Distribute prizes to students, classes or grades.

5 Communicate success



Use the *Email Portal* feature to send the *Completed Template* email to teachers and parents.

6 Receive your donations



If you chose to collect donations using our credit card processor, we will mail you a check within 7 days of the event end.

Starting a New Fundraiser

Select *New Fundraiser* from the main menu. Complete the form with the requested information. Once the fundraiser is created, click the *Open...▼* list and select *View Admin Page*. The admin page will be used by the event administrators to configure and manage the fundraisers. While our website is mobile friendly, we recommend using a tablet or desktop when doing the initial event configurations. To start the event configurations, select the *Setup* folder, then complete the listed items from top to bottom. Information can be edited at a later time if required.

You should have the following information available to complete the configuration:

- Organization Information: address, phone number and tax id
- Fundraiser Information: name, type, time zone, start date, end date, last date to accept credit card donations, last date to enter cash/check donations, monetary fundraising goal, reading or exercise goal and a description of the fundraising event.
- Logo: upload a logo for the organization or the event
- Student Data: see *How to Manage Student Data* section
- Student Goals: set the funding and secondary goals for each student
- Leaderboards: can be configured to create competition by class, grade or custom teams.
- Student Handouts: see *Student Handouts* section
- Administrators: assign additional administrators who will be helping manage the event

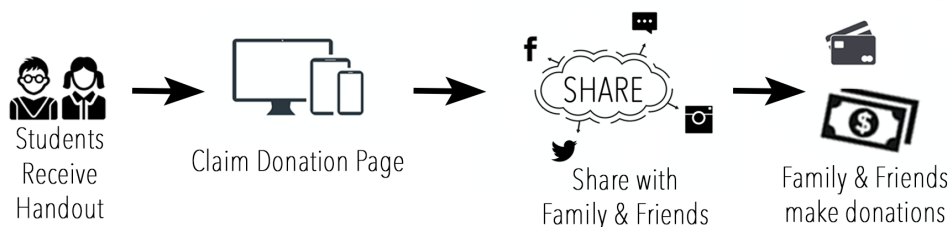
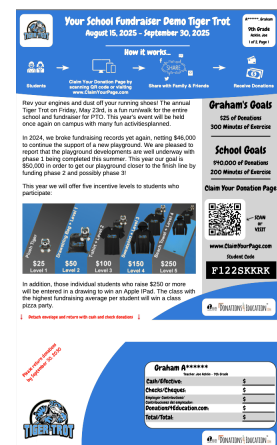
How to Manage Student Data

Student Data will need to be requested from the school office staff. This data is used to create online donation pages for classes and families. We use common email addresses between guardians to join students into families making it easy for friends or family to make a single donation for all students in a family. Donations4Education will not share these email addresses with any third party and we will not send emails to parents regarding our services.

The email portal is available to schedule or send emails to teachers and parents. Data should be uploaded in a csv file format. It is recommended that you download the sample format and add your students using MS Excel, Google Sheets or Apple Numbers. If you do not know how to do this, feel free to contact support@donations4education.com.

Student Handouts

Donations4Education will print and deliver all needed student handouts sorted by teacher then student last name for easy distribution. Each teacher and student will receive a donation handout. The handouts will include the fundraiser description, student goals and instructions on how they can claim their donations page. Student handouts by default include English on the front side. A second language can be added and printed on the back. Translations are automatically provided, however, we do offer the option to customize each translation to improve accuracy. A proof of the handout is available in the *Student Handout* section and must be approved prior to printing.



Cash and Check Donation Management

A plan must be developed BEFORE the fundraiser begins to ensure a secure accounting of donations including a process to move cash from students backpacks all the way to depositing at the bank. Donations4Educations accounts for cash/check donations as a convenience but is in no way responsible in any manner for the physical management of these donations. Your fundraiser can be configured so cash and check donations are not advertised, however, our experience is that you still receive a few throughout the fundraiser.

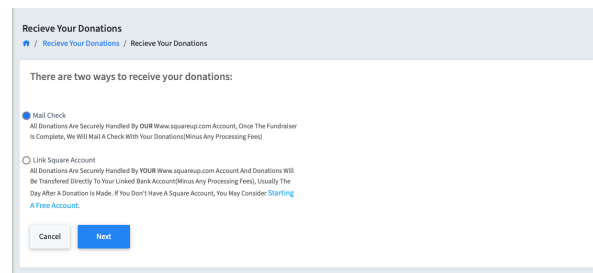
Donations4Educations suggests the following process to keep cash secure.

- Teachers will send donation envelopes to the office as soon as possible after they are received.
- Envelopes should be kept in a locked office, drawer or safe until the envelopes are processed
- Envelopes should be processed by at least two people to ensure security of the donations as well as protect the processors from accusations of dishonesty. The first person will open each envelope and verify the written envelope cash and check totals are accurate. Once they are verified, the cash and checks can be set aside and the envelope passed to the second person. The second person will use the *Add Cash/Check Donations* feature to enter the students names and amount donated into the website. Once all donations are processed and entered, verify the cash and check totals match the totals within the online system.
- The cash and checks should then be bundled within a new envelope with the total amounts of cash and checks written on the envelope. The envelope is then locked in a locked office, drawer or safe until the deposit can be taken to the bank.

Credit Card Processing Options

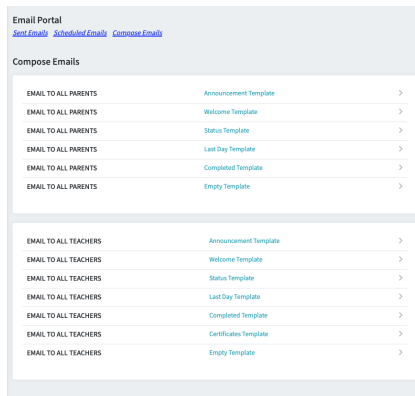
Donations4Education uses Square to process credit card transactions. If you have or create a squareup.com account, you can choose to link your account on our website. Linking will allow Donations4Education to process the credit card transactions through your Square account. Square will deposit your donations into your bank account as quickly as the next day. This process is secure and we will never ask you for your password. To link your account, go to *Setup ► Receiving your donations*.

Click the current options to make changes. Choose *Link Square Account*. You will be provided with a secure squareup.com link which will allow you to authorize Donations4Education to deposit and track credit card donations.



The screenshot shows a web interface titled "Receive Your Donations". It has a breadcrumb trail: "Home / Receive Your Donations / Receive Your Donations". Below the title, it says "There are two ways to receive your donations:". There are two radio button options. The first is "Mail Check", which is selected. Its description states: "All Donations Are Securely Handled By OUR www.squareup.com Account. Once The Fundraiser Is Complete, We Will Mail A Check With Your Donations (Minus Any Processing Fees)". The second option is "Link Square Account", which is unselected. Its description states: "All Donations Are Securely Handled By YOUR www.squareup.com Account And Donations Will Be Transferred Directly To Your Linked Bank Account (Minus Any Processing Fees). Usually The Day After A Donation Is Made. If You Don't Have A Square Account, You May Consider [Starting A Free Account](#)". At the bottom, there are two buttons: "Cancel" and "Next".

Email Portal

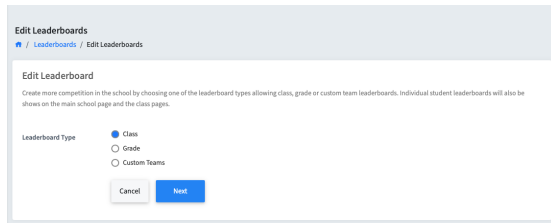


The screenshot shows an "Email Portal" interface. At the top, there are links: "Send Email", "Schedule Email", and "Compose Email". Below this is a "Compose Emails" section. It contains two tables of email templates. The first table is for "EMAIL TO ALL PARENTS" and lists: "Announcement Template", "Welcome Template", "Status Template", "Last Day Template", "Completed Template", and "Empty Template". The second table is for "EMAIL TO ALL TEACHERS" and lists: "Announcement Template", "Welcome Template", "Status Template", "Last Day Template", "Completed Template", "Certificates Template", and "Empty Template". Each row has a right-pointing arrow.

The Email Portal feature will allow you to send or schedule email messages ahead of time by specifying when messages should be sent. Emails use a mail-merge like feature to customize each message for the recipient with real-time data from the fundraiser. It is recommended that you schedule an email to parents 3 to 4 times a week during the fundraiser. If parents do not wish to receive emails, they are able to opt out using the link at the bottom of the email. Templates are provided as a guide, feel free to customize any messages.

Competitions

Leaderboards for amount raised as well as reading minutes or exercise minutes are



displayed on each fundraising page creating competition between students, classes, grades or custom groups. We suggest pairing both fundraising and reading or moving competitions with prizes. Some suggestions are below!

Prize Suggestions

It is important to remember, some of the best prizes are free. Principal or staff incentives can motivate students more than any prize they would receive individually. Here is a list of fun incentives that schools have done in the past according to ptotoday.com:

- Dressing like a chicken for the day and doing the chicken dance every hour around the school
- Camp on the school roof for the night
- Duct taped to the wall in the cafeteria
- Pie in the face
- Kissing a pig
- Slimed
- Jail the principal in the cafeteria over lunch



Other prize ideas include traveling trophies for the class, grade or team that has the most reading/exercise minutes, as well as the class, grade or team that raises the most money. These trophies can be used year after year and can be exchanged often during the fundraiser to keep competition alive! Other class/grade rewards include:

- Out of uniform day (if your school wears uniforms)
- Extra recess
- No homework passes
- Watching a movie with popcorn or snacks
- Bring a stuffed animal to school
- Special show and tell for the entire class
- Pajama day

Support

We are here to help. Please contact us using the information below.

J Plus Products Inc.

dba Donations4Education.com

www.Donations4Education.com



317-742-0220

support@donations4education.com

