



THE ABILITY EXPERIENCE

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A PI KAPPA PHI PHILANTHROPY

2018 Fundraising Manual

A Guide for Team Members



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Introduction

I. THE MISSION

We use shared experiences to support people with disabilities and develop the men of Pi Kappa Phi into servant leaders.

At the core of what we do is our mission. It is important to recognize that we have a **two-part mission; to serve people with disabilities and develop the men of Pi Kappa Phi into servant leaders**. It is important that you understand our mission. It is the core of what we do and behind every decision we make.

There are three important parts of the mission; shared experiences, people with disabilities, and the men of Pi Kappa Phi. Each piece is critical to what we do. Shared experiences between people with disabilities and the men of Pi Kappa Phi have been the fuel of our outreach efforts for 40 years.

Shared experiences are the area where we make the single biggest investment in our mission. It is the nexus of Pi Kappa Phi men working directly with people with disabilities. It is where the magic happens. This summer, shared experiences such as camp talent shows, barbecues, and dances are just a few of the events that will make up your greatest memories.

From an integrity standpoint, it is critical that the work we do has an impact on people with disabilities. Through 150 partner organizations, we will spend time with people with disabilities in the communities through Friendships Visits. Our grant activities focus on funding needs that in every year go underfunded. Our partner organizations speak to the impact of our mission as the highlight of the year. Some of our partners have been working with us for more than 30 years.

Often when fundraising, we focus on the first part of the mission—serving people with disabilities—which is okay. That is a critical aspect and something we work incredibly hard to ensure we have a balance and are meeting needs in the disability community. We are constantly getting feedback from our summer volunteers and there is tremendous value in what we do.

Recognize that you are an important piece of the mission as well. It might feel a little weird to put yourself in the mission aspect of the organization, especially while fundraising, but it is really important to us from an investment standpoint. We believe you can change the world and this experience will be a launch pad for great things you'll do this summer and to impact our communities in the years to come.

We have a unique mission. Across the country there are so many people that have so much love for this fraternity because of the impact we have year in and year out. All of this impact begins and ends with our mission.

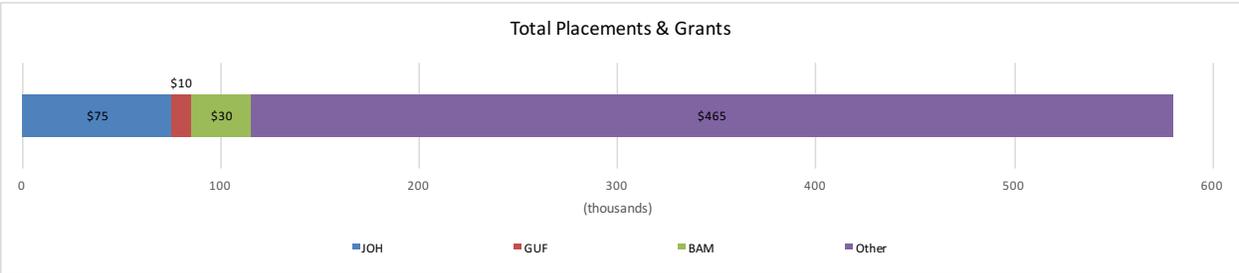
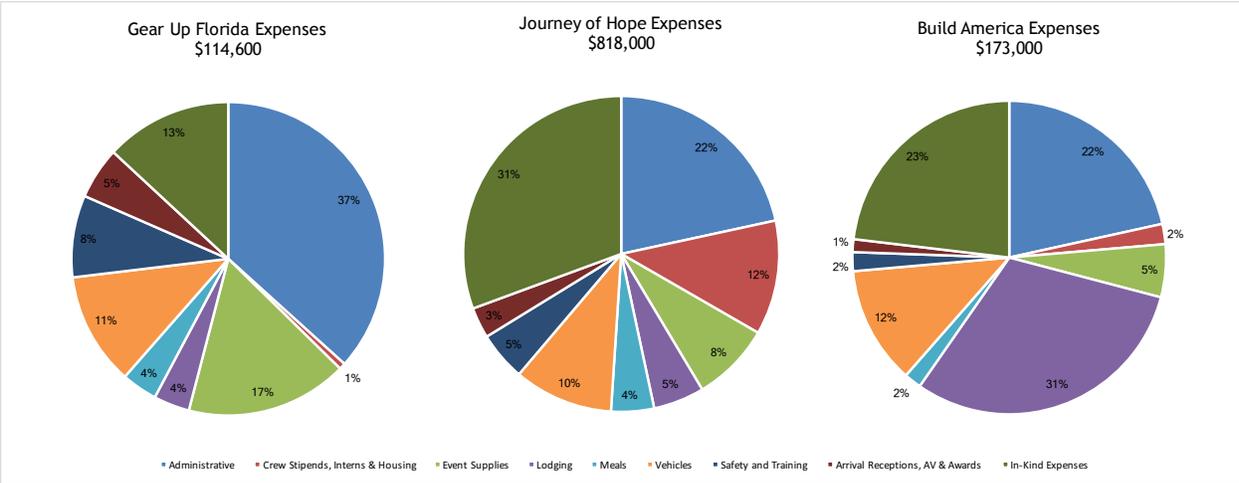
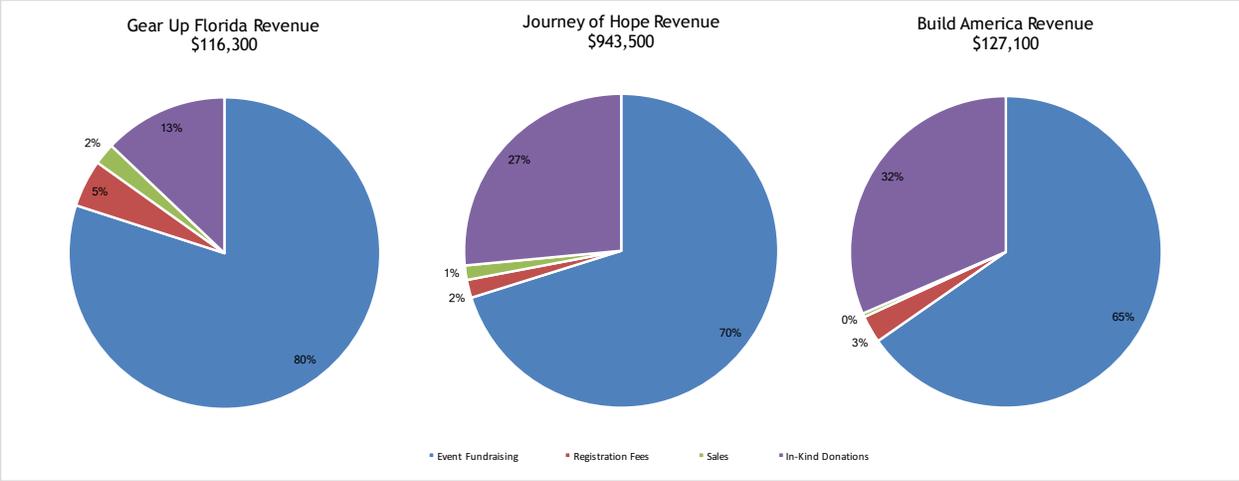
II. WHERE DOES THE MONEY GO?

You're working hard to raise funds for The Ability Experience and we want to be transparent on where the money goes.

Our summer events are a big investment. We work hard to control costs while providing a high-impact experience. The table below shows you how much is raised for each event and the costs to put on the event. The amount awarded to partner organizations that support people with disabilities is also shown below and explained in the next section.

	GUF	JOH	BAM
Event Fundraising	\$ 93.0	\$ 662.0	\$ 83.0
Registration Fees	\$ 5.7	\$ 17.5	\$ 3.6
Sales	\$ 2.6	\$ 14.0	\$ 0.5
In-Kind Donations	\$ 15.0	\$ 250.0	\$ 40.0
Total Revenues	\$ 116.3	\$ 943.5	\$ 127.1
Administrative	\$ 42.1	\$ 176.8	\$ 37.3
Crew Stipends, Interns & Housing	\$ 0.8	\$ 95.9	\$ 3.6
Event Supplies	\$ 19.1	\$ 66.3	\$ 9.4
Lodging	\$ 4.3	\$ 42.7	\$ 52.9
Meals	\$ 4.2	\$ 35.9	\$ 3.1
Vehicles	\$ 13.3	\$ 83.2	\$ 21.0
Safety and Training	\$ 9.7	\$ 41.1	\$ 3.4
Arrival Receptions, AV & Awards	\$ 6.1	\$ 25.9	\$ 2.3
In-Kind Expenses	\$ 15.0	\$ 250.5	\$ 40.0
Total Expenses	\$ 114.6	\$ 818.2	\$ 173.0
Grants	\$ 10.0	\$ 75.0	\$ 30.0
Total Placements and Grants	\$		580.0

*All values listed in thousands of dollars



III. SERVING THE MISSION & GRANTS

This year, The Ability Experience will award over half a million dollars in placement and grants across all of our programs. Grants are an important part of our mission, but they are not the primary focus. The Ability Experience's mission is to provide shared experiences between people with disabilities and members of Pi Kappa Phi.

Grants, however, are important to us and we focus on the best way to impact the organizations we work with while serving our mission. Through our grant programs, you will be able to see first-hand how the money you raise will impact people with disabilities beyond shared experiences. Between all three summer events, **The Ability Experience will award \$115,00 in grants to partner organizations.**

Cycling Event Grant: These grants are awarded to organizations that host the Gear Up Florida or Journey of Hope teams. The recipients are selected by The Ability Experience Grant Committee based on feedback from team members. Each route

is awarded six grants each summer to disperse to these organizations. These grants fund special projects or equipment our partner organizations will use year-round.

Memorial Grants: These grants are awarded to Journey of Hope host organizations selected by a team vote at the end of the summer. The grants are awarded in honor of The Rogers Family, Todd Porterfield, and Jason Tirado. These grants are additive and typically will pay for program fees or special equipment.

Mountain Khakis Adventure Grant: This grant is awarded to a Journey of Hope host organization and chosen by the team that wins a social media competition.

Build America Grant: This grant is awarded to the camps that host the Build America team. This grant is used to provide materials for the team to use to construct accessible amenities for the camp. Sample projects include accessible trails, decks, boardwalks, or horse runs.

Fundraising

I. INTRODUCTION

Fundraising for your event is like taking another class. The difference is that you get to write the syllabus of how you will be the most successful. The most important thing is that you get in routine and put the time into your fundraising. In fact, this is where one of your best lessons from this experience begins. To hit your goals, you must put in the work and be a man of action. By the end of this section, you should be able to put together a great plan and get to work on executing it.

There is a lot of information in this section, we kind of throw the kitchen sink at you so that you can come up with a plan that will work for you. There's no single right way to fundraise. The key to a being a good fundraiser is to figure out where your strengths are and focusing on those areas. Take the time to read through this thoroughly and then come back to write out your plan.

The last critical thing you need to do to be successful is to ask everyone you know! I know, I know, you're already sick of hearing it. But, we'll keep saying it because this is the biggest determinant of success. Sometimes it feels that fundraising is like begging. Fundraising is no different than sales or employing skills that you will need to use in the business world. You are selling the opportunity for someone to make an impact through you. You are helping someone connect to the community through your work. The only way to fight off this feeling of guilt is to put yourself out there and ask. We promise you, it will get easier with time.

II. FUNDRAISING RULES

The Basics

1. Donations made on your behalf are donations made to The Ability Experience. If you withdraw or are dismissed from the team, these donations will not be refunded.
2. Donations made on a team member's behalf may not be transferred to another team member.
3. Team members failing to raise the minimum requirement will not be eligible to participate in The Ability Experience's team events.
4. In-kind contributions (cycling equipment, tools, clothing, travel, etc.) do not count towards a team member's fundraising total.
5. The Ability Experience will not reimburse team members for personal expenses.
6. Donations made on a team member's behalf may not be used to cover bicycle, equipment, tools or other personal costs.

7. Failure to follow the fundraising rules may result in dismissal from the team.

Chapter Fundraising Support

1. Chapter fundraising efforts cannot benefit a team member's total. We get it, the chapter may want to help you out, but this is unfair to the chapter and the rest of the team and Pi Alphas who have gotten to their fundraising goals on their own. No free rides.
2. Team members may not organize fundraisers using chapter manpower. The rule of thumb is 10% of your chapter or a maximum of five (5) chapter brothers may help you on an event. If more than 5 chapter brothers are signed up for team events, all of those signed up may work together on an event. Any team members found in violation of these may lose their spot on the team.

In-Kind Contributions

In-kind contributions can truly help a team member to reduce the financial burden. It is important that you remember five things.

1. Your fundraising money **cannot** be used to help reduce transportation, equipment, or other personal costs.
2. In-kind gifts are not included in your fundraising total.
3. In-kind contributions made to a team member are generally not tax-deductible.
4. If you are writing a letter to ask for a donation to The Ability Experience, you must use the funds raised from this campaign toward your fundraising goal. There have been instances where people are not sure where their fundraising is going or think they donate to the cause when they have donated to the purchase of a bike or tools. Be clear.
5. You cannot ask for funds to benefit The Ability Experience and funds to buy a bike in the same letter. This is to avoid confusion.

Please keep in mind why you are fundraising; to improve the lives of people with disabilities.

If you do ask for help with your bike, tools, or other items, remember that the more money you raise toward your cause, the greater impact Pi Kappa Phi and The Ability Experience will have on those we are reaching out to across the country.

III. FUNDRAISING COMMITMENT

Each team member has committed to raising a certain amount for your respective event. We are committed to working with you to make sure you have the tools you need to succeed.

As we discussed during the interview, you need to be in good communication with our staff. This is especially true if you are nervous or behind on fundraising.

We have put together fundraising deadlines for each event. The goal is to have a check-in call each month to make sure we keep everyone on track.

Team members are expected to reach their fundraising goals by the deadlines that have been set for them.

If you miss a deadline, you should expect the following:

1. An email from your regional director notifying you of missing a deadline and requiring you to set up a call as soon as possible
2. Your status on the team will be re-evaluated and you could be moved to a roster waitlist
3. To create a detailed fundraising plan with mutually agreed upon timeline to get you back on track
4. To keep excellent communication with your Regional Director

If a team member does not reach a minimum fundraising amount by the final deadline, he must submit a credit card commitment form. Staff will work with the individual to set a grace period to allow him to reach the fundraising minimum. After that time, if the minimum has not been reached, a non-refundable charge will be made to the card for the amount remaining below the fundraising minimum.

If a team member cannot meet the final fundraising deadline and will not sign a credit card commitment form, he will be removed from the roster and not permitted to participate the event.

IV. GETTING STARTED

Each team Here is a quick checklist to get things moving. These are the first steps that so many team event participants have taken to get a jump start on their fundraising.

First Steps Checklist:

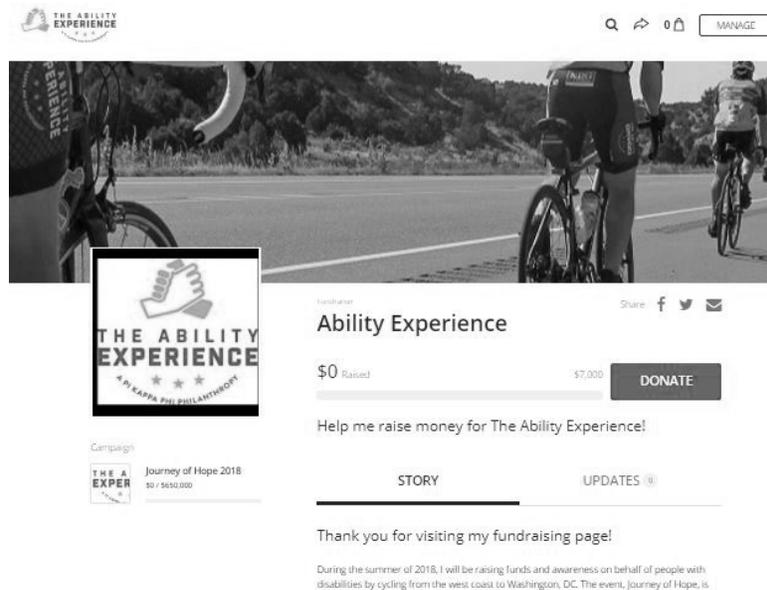
1. Read this manual!
2. Set up your online fundraising page and personalize it with your own goal, picture, and short bio. People who have a personalized story raise more money!
3. Sit down with your family to ask them for a gift to get you started. The first couple gifts set the precedent of what other people will donate.
4. Brainstorm a list of at least 150 people that you can contact to donate.
5. Write your fundraising letter*
6. Make a month by month fundraising plan*
7. Mail out your fundraising letter to your list of potential donors
8. Know your subject: become familiar with different types of disabilities.
9. Once you reach 20% of your minimum goal, go public with it on social media!
10. Plan your first fundraising event.

*Send these items to your regional director for feedback

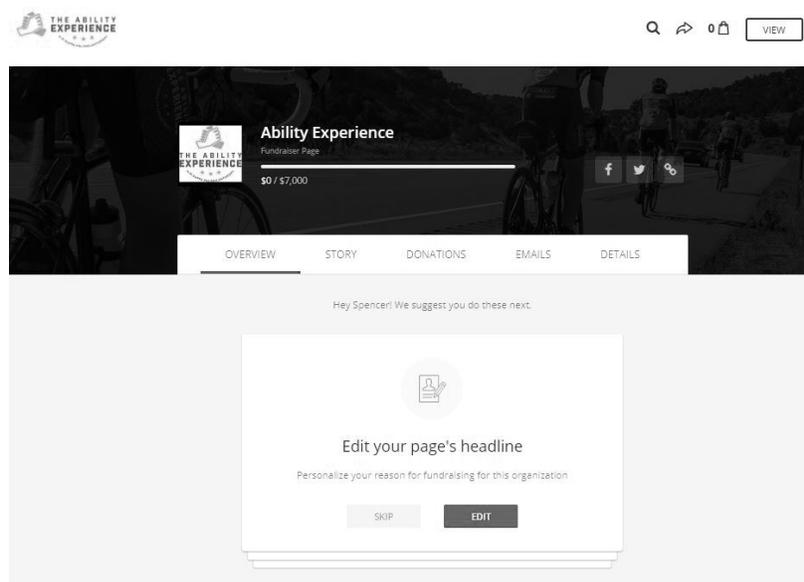
V. YOUR FUNDRAISING PAGE

Welcome to your online fundraising page! In this portion, we'll explain how to use the fundraising platform. You have already received the link to sign up and have created your page, so what next?

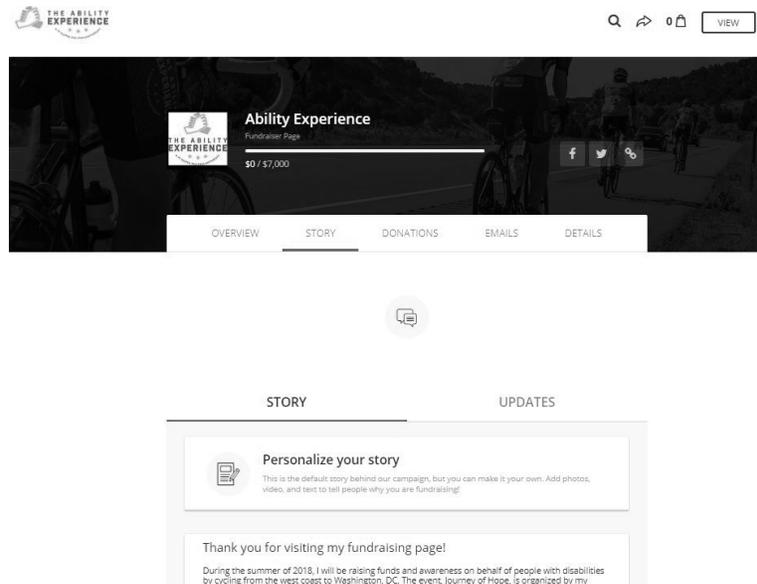
- I. To manage your page, click the “manage” button in the upper right-hand corner.



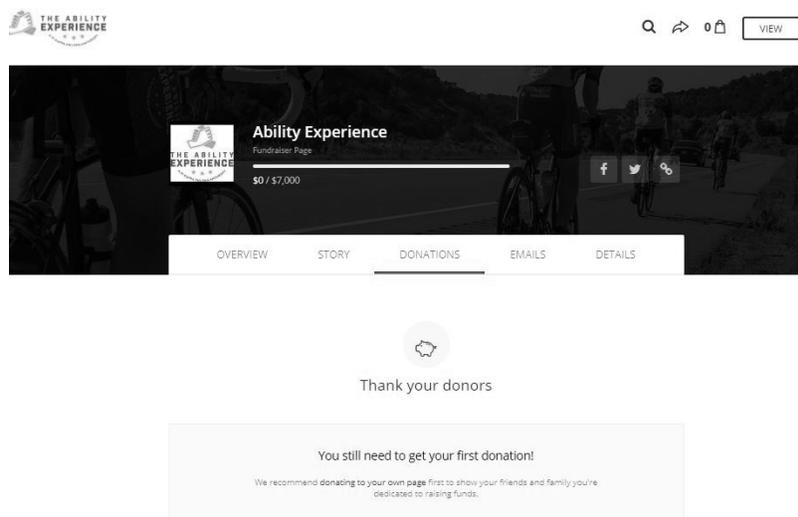
- II. The overview section is your page dashboard, when you first sign up, it will give you prompts to customize aspects of your page.



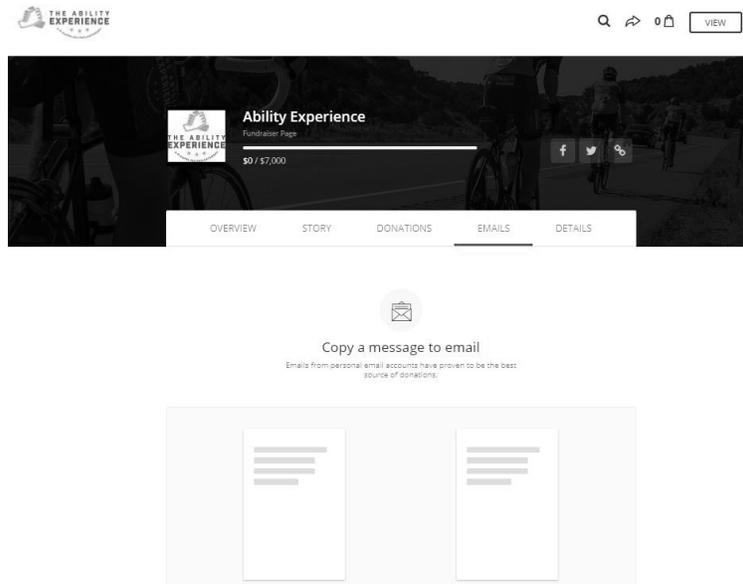
III. Use the “Story” tab to personalize the story on your page and post updates of what is happening with your fundraising and training.



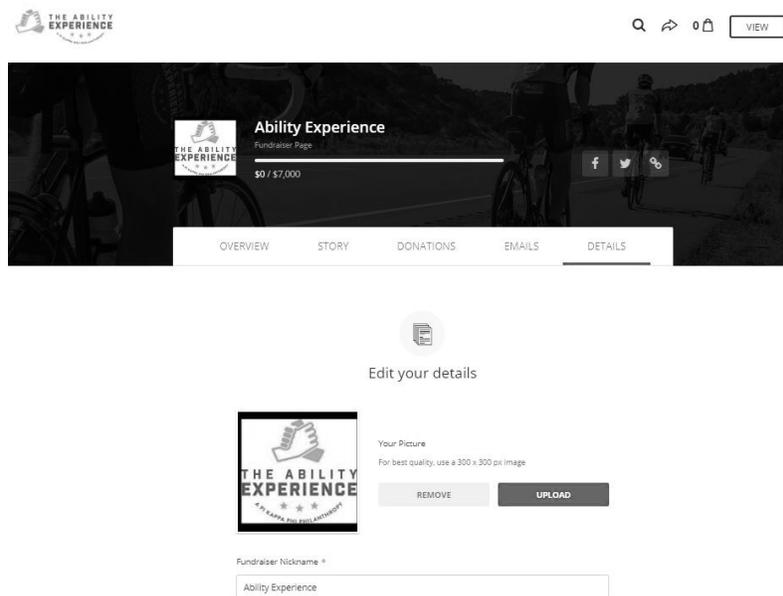
IV. Use the “Donations” tab to track your donations and create a list for thank you cards.



- V. Use the “Emails” tab to use and create stock email templates to ask donors for funds or follow up with donors!



- VI. Use the “Details” tab to update your account settings.



So, now that you know the ins and outs of your fundraising page, personalize it and use it to your advantage.

VI. THE PITCH

Now that you have some background on the event, talking about it is critical. To hit your goal, you are going to have to talk to everyone you know and don't know (yet) to get there. This part is what we call, "The Pitch".

The pitch is a 30-second speech that summarizes who you are, what you're doing, and why they should donate to your trip.

You should be able to reel off your elevator pitch at any time, from an interview with a local paper to a club presentation. You'll have to get good at understanding if you actually have the time in an elevator or a 10-minute talk at a rotary club, which we'll talk about later.

To create this pitch, you start with three simple questions: who are you, what are you doing and why are you doing it?

1. Who are you?

"Hi, I'm Simon Fogarty and I'm from the Pi Kappa Phi Chapter at the College of Charleston"

2. What are you doing?

"This summer I am riding my bike from Long Beach, California to Washington D.C, across the country on a trip called Journey of Hope."

3. Why are you doing it?

"The 4,000-mile trek uses shared experiences to benefit The Ability Experience which seeks to build the men of Pi Kappa Phi into servant leaders while serving people with disabilities."

Now bring those three things together to create your pitch. Here's an example:

"Hi, I'm Harry Mixson and I'm from the Pi Kappa Phi Chapter at the College of Charleston. This summer I am cycling from Long Beach, California to Washington, DC raising funds and awareness for people with disabilities. This event is part of The Ability Experience, an organization created by my fraternity to used shared experiences to impact the lives of people with disabilities."

This will lead you into questions about your trip, The Ability Experience and why you're doing this trip which you should also be prepared for!

Now that you've built your pitch, practice it, perfect it and utilize it.

VII. BUILDING YOUR LIST

We have talked about brainstorming a list of potential donors and this is key before you even write your letter. Grab your parent's holiday card list, look back at old teams or organizations you have been a part of, and share a document with close family that may help you grow your list. This is job #1.

To begin your list, take a piece of paper and brainstorm as many people as you can in the areas listed below. It will probably take a few times of sitting down and getting creative about who you can reach out to. You never know who is going to have a connection with our cause and will be more than willing to support it.

When you have close to 150 names, begin collecting their contact and other information.

Start with the following columns:

- Name
- Phone number
- Email address
- Mailing Address
- Organization/Company
- Amount asked
- Date of last follow up
- Date donated
- Amount donated
- Thank you sent
- Postcard sent

There is a Microsoft Excel template in the Participant Center Resources to use to create your donor list. If you don't have contact information for someone, go ahead and list their name so you don't forget them and then add their information later. Don't be afraid to ask someone for their address or email so that you can reach out to them more formally, they will

appreciate your effort. **(PRO TIP: Use mail merge in Microsoft Word to quickly create dozens of personalized letters, print mailing labels, and sent out follow-up emails.)**

Who Do I Reach Out To?

Everyone! Don't forget to include both your communities on campus and back at home. Start with your local Chamber of Commerce and Student Activities Center for a listing of organizations that would be able to help you out!

Here are some ideas to get you started:

Family and Friends

1. Grandparents
2. Aunts/Uncles
3. Cousins
4. Brothers/Sisters
5. Parents' friends
6. Family Civic Clubs
7. Friends' parents
8. Parents' business contacts
9. Relatives' friends
10. Friends' businesses
11. Neighbors
12. Local organizations (Home and school)
13. Chapter brothers' parents
14. Chapter Pi Alphas
15. Chapter alumni (see your historian for list)

Civic Groups and Local Organizations

1. Chamber of Commerce
2. Rotary Club
3. Lion's Club
4. Kiwanis Club
5. Knights of Columbus

6. Jaycee's Club
7. Church/Synagogue/Mosque
8. IFC/Panhellenic
9. Student Government
10. Other Student Groups

Make sure that you explain the impact of the donation and offer to bring in customers through a benefit night if you are asking a restaurant. **(PRO TIP: Have a flyer, letter, or business card to hand them in case a manager is not available to meet with you.)**

Local Businesses

1. Businesses you frequent
2. Businesses that serve students
3. Past employers

Set parameters for what you're asking for. Don't go into a business, tell them your fundraising goal, and ask if they can help. Explain that your goal today is to raise \$400 by asking businesses for \$50 each.

Corporations

1. Parent's business contacts
2. Local/National Business HQ's (home and school)
3. Chapter brothers' family and friends
4. Big supporters of your school or campus community

VIII. PLANNING YOUR STRATEGY

Over the years, our team members have fundraised in about every way imaginable. The key to fundraising success is finding which strategies are most effective for you. There are some general principles that will help you spend your time fundraising as effectively as possible. So, let's dig in.

“A goal without a plan is just a wish.”

How much should I ask for?

Once you have brainstormed your list, it is important to figure out how much you will ask from each person, business, or organization. Adding a column in excel will help with this.

The chart below shows the range of gifts, prospects, and actual donations you will need to secure to meet a fundraising goal of \$5,500. If your goal is \$7,500, \$3,500, \$2,500 or \$1,000 you can adjust the following numbers accordingly. More important than the specifics of the chart, is the idea of how many people you need to ask to hit your goal.

We have also added a few of the tactics from the ladder of effectiveness. If you think you can raise more funds from face to face visits (we highly recommend this!) then go for it. If you think you're mailing will be more successful and you don't need to do an event - make it

happen and adjust your plan. This is just a guide and you'll have to make the decisions and map out your own strategy.

This is also a good place to introduce the idea of following up with people you have asked. It is important to plan for check-ins and follow ups, especially after someone has committed to supporting you. This may feel awkward, but it is something that even professional and volunteer fundraisers do all the time. Sometimes life gets in the way or it is simply a timing issue. A simple phone call goes a long way to bringing in that donation you've been waiting for. (Yes, sometimes an email will work, but a call is much more effective.)

Gift Range Chart

Gift Range	No. Gifts required	No. Prospects required	Subtotal	Cumulative total	Cumulative percentage	Tactic
500	2	8	1000	1000	18%	Face to Face
250	3	12	750	1,750.00	14%	
100	4	16	400	2,150.00	7%	Email
75	12	48	900	3,050.00	16%	
50	15	75	750	3,800.00	14%	
25	30	150	750	4,550.00	14%	
10	75	225	750	5,300.00	14%	Event
5	50	200	250	5,550.00	5%	
Totals	191	734	5,550.00			

The Solicitation Ladder of Effectiveness

Listed below is the ladder of effectiveness for the different solicitation techniques. While fundraising letters and e-mails are the easiest way to reach people, they are not the most effective. Talking with someone directly is always more personal. In fact, our numbers show gifts solicited in person are almost two times the size of those received online. Getting in front of a few key donors could pay big dividends. Social media and news stories may reach more people, but they have a much lower donation rate. This should help inform your strategy and gift range chart.

Pay close attention to the difference between *personal* and *impersonal* asks. The more personal you make your fundraising plan, the more successful you will be in reaching your goal.

Ladder of Effectiveness:

1. Face-to-face conversation with handout
 - a. Team of two (Bring a parent or chapter brother)
 - b. One person
2. Phone call followed up with a letter/email
3. Personal Letter/Email followed up with a phone call
4. Impersonal letter/e-mail (direct mail, mass email)

5. Impersonal phone call (phone-a-thon)
6. Fundraising event
7. Door-to-door solicitations
8. Social Media (Facebook, Twitter, etc.)
9. PR (Newspaper, radio, etc.)

Fundraising Plan

Now that you understand many of the ways you can fundraise, put together a plan. What do you want to do to make it happen? What methods will have the biggest impact for you? Remember, you don't always know until you try it. It is also important to consider the timing of fundraising. Take advantage time when you will be visiting family and friends like holidays, vacations, and special events. Think about when you will have time to fundraise both at home and at school. Don't schedule your biggest fundraising event the same week as midterms. Consider when your chapter and sororities have events on campus and plan around those as well. To start, map out each month ahead with two or three things that you can do to be most effective with your fundraising. Here are a few ideas to get you started:

- **Holidays:** It's the season of giving, so why not ask for donations while people are in a charitable mood?
- **End of Year:** People love taking advantage of tax deductions from donating to non-profit organizations. Just remember that if someone gives you a check near the end of the year, get it in as soon as possible so that it is credited to that the same year.
- **Winter Break:** This is the most important time of year for fundraising for most people. Go in with a plan and you'll be come out on top.
- **Back on Campus:** This is a great time talk to Greek life before the craziness of the semester kicks in. New Exec boards are in place and ready to make their mark on campus, reach out to them and other organizations for support.
- **Spring Break:** Sacrifice is a part of service. How can you spend your spring break to get ahead on fundraising or even get in some long rides?
- **Graduation:** Are you graduating right before taking on one of our events? We know that can be stressful, but use it to your advantage. Ask family and friends to make donations on your behalf in place of graduation presents.

IX. FUNDRAISING LETTER

For most team members, your go-to move is going to be your fundraising letter. Yes, we say fundraising letter because for a group of your potential donors, this is going to be the way to go. For the most part, we are really talking about hand-signed letters, email, maybe FB messenger, but probably not text. Overall the medium does not matter, but your message does.

Before we get to the letter, just a word to the wise; don't put this off. You have a small window to launch a campaign and the further you get away from your acceptance date the tougher it will be. Sometimes guys want to start with getting corporate donors or wait on one big check. ***The story always ends the same—the donation never comes and the team member is scrambling at the last second.***

It is also important to remember that while the fundraising letter has been one of the most successful fundraising methods to date, it is not sure-fire. While your letter is out, you must be doing other things to supplement your letter campaign. If you sit back and wait for the mail to bring you all your money, you will be disappointed very quickly.

We will talk about two types of letters in this section: handwritten and printed.

Handwritten letters may not be your go-to for letter campaigns, but a few years ago our top-fundraiser wrote more than 100 handwritten letters to family and friends. His fundraising was easy, and he didn't have to do anything else. Many team members have been successful with this because your letter will get read—guaranteed! This then opens up an opportunity to have a conversation about the event.

We highly recommend this for people you are trying to get a face to face meeting with. Keep in mind your call to action is ask for a meeting versus the donation.

Printed letters are a great way to make sure your letter gets read but with some efficiencies built in. Adding in a return envelope that has been addressed for the donor makes it even easier. All a donor needs to do is put in their check and drop it in the mailbox. Some team members have included a stamped return envelope, but we have not found that to improve the likelihood of someone sending a donation in.

Writing your letter

The purpose of your letter is to show someone who doesn't know anything about The Ability Experience, your involvement with Pi Kappa Phi, or the importance of helping the disability community and make them understand how their support would make a huge difference in our mission. Keep to a single page in length, but make sure you include these key items:

- What you are doing this summer and why
- Who The Ability Experience and Pi Kappa Phi is
- A connection with serving people with disabilities
- A call to action with deadline you'd like to receive the donation by
- We are a 501(c)(3) non-profit and all donations are tax-deductible
- The link to your fundraising page
- Instructions for mailing a check donation
- A thank you to the person reading it
- Your signature

The letter provided in the Participant Center Resources is a [Sample Letter](#). Please do not copy this verbatim, as it has been used in previous years. It should be used as a resource in

creating your fundraising letter. The form is important but it is more important to personalize it for why you want to do this trip.

You will also find professional letterhead in the Participant Center Resources. Type your fundraising letter on to this existing letterhead format for your face to face meetings.

Sample Letter and Letterhead provided in the Participant Center Resources

X. FUNDRAISING EMAILS

This is where the magic happens for most team members. You have done all the work so this section will be surprisingly short given the priority it takes. To recap, you have built out your list, added their contact info, and prioritized people that won't receive emails because you are using a different means of soliciting a gift.

For emails, you have two tools; your fundraising page and the fundraising email. Use a solicitation e-mail and your profile as fundraising partners. Don't write your emails as mirror images of your online profile. Use the e-mail as a hook to get potential donors to your page. Close the deal with the content of your profile and your fundraising page. **(PRO TIP: Always ask recipients to forward your e-mail!)**

You can also use e-mails as w-up for your letter campaign. Send a brief email to sponsors who have already received a

letter, but have not donated. They should know about your fundraising page from your letter; now they have the link and no reason not to visit your profile page.

Use e-mails as a second thank you. Update your profile before you leave for your trip and send out a thank you emails to all of your sponsors just before the trip starts.

When fundraising through our system, it is fine to just send your link out versus using the system. Customize your link with your name and include it in every appeal for support.

Note: When someone makes a donation through your fundraising page, they automatically receive an email from the system thanking them for the contribution on our behalf and providing them with a donation receipt.

Sample Email provided in the Participant Center Resources

XI. FUNDRAISING EVENTS

Below are some examples of events others have done in the past. If these are planned and executed well, you can see a great return on your efforts.

10k Run	Donation Boxes	Pancake Breakfast
50/50 Raffle	Door-to-Door	Penny Drop
Advertisement Book	Dorm Storm	Posters
Alumni Reunion	Doughnut Sales	Professor Appreciation
Bake Sale	Dunking Booth	Dinner
Basketball Tourney	Egg Toss	Push-A-Thon
Bingo	Empathy Training Dinner	Roadblocks
Bowl-A-Thon	Flower Sales	Rodeo
Calendar Sale	Free Throw Contest	Scaffold Sit
Candy Sale	Golf Tourney	Shoe Shine
Car Smash	Holiday Events	Snow Removal
Car Wash	Homecoming Event	Softball Tourney
Carnival	Jail-A-Thon	Sorority Help
Casino Night	Leg Shave	Sorority Quarters Race
Chili Cook-off	Lemonade Stand	Toll Road
Church Event	Letter Campaign	Tricycle Races
Civic Groups	Mall Solicitation	Video game tournament
Coupon Books	Miss-A-Meal	Wheelchair Race
Cow Chip Bingo	Networking	Window Wash
Dance Marathon	Newspaper	Yard Work
Deposit Returns	Other Greeks	

Steps for Effective Event Planning

What will make or break your event, is not the event you choose, it's how well you plan and execute it.

1. Know Your Event

Using the events brainstorm above, select an event that you feel confident that you can plan & execute. If your event involved alcohol, reach out to your regional director for assistance.

2. Know Your Audience & Build Your Guest List

Your guest list may include students, alumni, faculty and staff at the university, local community VIPs, family members, members of the community, and the disability community.

3. Set Your Goals

To ensure your event is successful, set your goals for how much you want to raise and how many people you want to attend.

4. Set the Date & Secure the Venue

Cross-Referencing Calendars

In order to maximize the impact of your event, be sure to cross-reference your chapter calendar, academic calendar, university athletic calendar, intramural calendar, and fraternity/sorority community calendar to avoid any conflicting dates. Avoid hosting your event at the same time as any other major events on campus, and be sure to consider exam schedules and breaks.

Selecting an Ideal Venue

The first place you should look for a venue is on campus: the campus quad, student union, university center, campus ballrooms, campus theatres, gyms, etc. Being a member of a student organization, you may be able to utilize these facilities at a reduced rate or for free. For off-campus venues, you may need to shop around for a suitable place with a reasonable price. Ultimately, your ideal venue will be driven by your audience.

Planning in Advance

Most of the ideal venues for your event must be reserved well in advance. Many campus organizations are also looking to use these venues. To ensure you get the venue you want for the date and time that you want it, make your reservation as far in advance as possible. Check with your local campus facilities, as you may be able to make your reservation a semester or two in advance.

Minimizing Costs

When choosing your location, your decision should be largely based on the cost of the venue. Many of your campus facilities are offered to student organizations at a reduced rate or for free. If you are unable to find a suitable venue on campus, your next option is to find an off-campus facility. When approaching an off-campus venue, be sure to explain the event and

the mission of The Ability Experience. Then ask them to either donate the use of the facility or offer a discount on the fee.

When gathering supplies for your event, you should also keep in mind the cost of the necessary items. Many times, businesses can donate items or services to help benefit your event. This can include grocery stores donating supplies/gift cards, catering companies providing food and/or services, and local businesses donating merchandise or gift cards. Minimizing the cost of your event will maximize its effectiveness and therefore the amount of funds that will go to support people with disabilities.

Here are some other things that you will need to consider when planning your date and venue:

- What supplies will you need?
- Does the venue require a contract?
- Will you provide food and beverages?
- Will there be tickets sold?
- Will alcohol be present?
- What technology will you need?
- Will you have entertainment at the event?

5. Create an Event Planning Checklist/Timeline

Using all of the plans and ideas that you want to move forward with at the event, put together a checklist of items that you need to complete and corresponding deadlines.

6. Promote Your Event

- Get the word out about your event using the following methods:
- Social Media
- Sorority/Fraternity Presentations

- Flyers, Posters & Electronic Sign boards
- Event T-Shirts
- Tabling
- Local & Campus Media

7. Execute the Event

This is it! You've done everything to be prepared and set yourself up for success. Now go out there and make it happen! Relax, have fun, and talk to as many people at the event as possible.

8. Event Follow Up

- Using your RSVP forms, keep track of who made a donation at the event.

- Don't forget to send your sponsors a thank you note and an update letter.
- Follow up with guests who made a pledge at the event. Also, do follow-ups with those who didn't show. Let them know how it went, and that you still need their contribution.
- Call or send a letter within two days. These calls, made within days after a party, have an impact that will be lost over time.

Sample Event: Bike-A-Thon

Bike-a-thons are always a great fit for cycling event team members. There are some things you can do to take your fundraiser to the next level.

Location is the key. The best places to do your event are the local shopping malls or the center of campus or the student union. Actually, let's remove "or" and make it an "and" because you can do all three. The great thing about the bike-a-thon is that they are so easy to put together. All you need to track down is a trainer for your bike and you are set to go. Be sure to set up a display and a table with your personalized fundraising brochures and The Ability Experience brochures.

You may also consider doing it at a local bike shop especially if the manager is willing to give you items at cost or even free. More bike shops are hosting events to get people in the shop and it could be a cool networking event for you.

Borrow a wind-trainer or a set of rollers and all you need to do is get on your bike and pedal. Perhaps you can get people to sponsor you by the minute or hour. Enlist the help of some of your friends or sororities to man the table and answer questions from people passing by and more importantly, man a collection jar so that people can give.

Don't forget your hometown...set up a booth at the local mall when you're home for winter break or spring break. We have even had team members get back to their high school basketball games and speak during halftime while riding their bike during the games.

Helpful Hints:

- You can't wait for people to come to you. Your volunteers need to approach them and ask if they would like to make a contribution towards your efforts.

- Most of your donations will be between \$1 - \$5.
- The success of a bike-a-thon depends upon the number of people you approach and the time you spend at your event.
- Contact the school newspaper and let them know what is happening. Some pre-publicity will help your efforts tremendously!
- Convince a “local celebrity” to ride along with you for a short period of time. Try to get the football coach or dean of students to participate.
- If you have success with one, try another a few weeks later. If it works...keep doing it!
- Try to get some items donated to raffle at a given time. If you are doing it in a mall, approach one or more of the stores to donate items for a raffle.
- You can also collect credit card donations online through your fundraising page. Just pull the page up on your phone or on a computer (you will need internet access). This way no one can give you the excuse “I don’t have any cash on me.”

XII. Social Media

Using social media is a great way to keep people interested and informed of your progress. Think of social media as a great compliment to the work you are doing from a donor awareness standpoint. It is not something that should be relied upon as a driver for raising funds.

The Ability Experience Social Media Accounts

Tag The Ability Experience or other organizations of which you may also be a fan or follower to increase who sees your posts.

Facebook: www.facebook.com/abilityexperience

Twitter: www.twitter.com/abilityEXP

Instagram: <https://www.instagram.com/abilityexp>

Flickr: <https://www.flickr.com/photos/abilityexperience>

YouTube: <https://www.youtube.com/c/abilityexperienceorg>

Maximizing Social Media

To really maximize social media, you need to think of yourself as a content creation company. Every week you need to look at ways to give your followers a way to

experience and engage in what you’re doing. Pushing out updates on multiple platforms and showing everyone your commitment through your *actions* will help

to make receiving a donation from them much easier.

An update that includes your online profile hyperlinked once a week will go a long way in spreading the awareness of your event. Mix it up and make sure that you aren't talking about your fundraising 24/7, but don't neglect it either.

Here are some ways you can give an inside look to everything you are doing:

- Shoot a quick video after a tough training ride.
- Snap a pic of your first flat tire

- Screenshot when someone makes a generous donation or puts you over a fundraising milestone
- Include facts about the organization
- Highlight when a school project goes well. You will have weeks where it will be tough to balance school and fundraising--show your supporters you are walking the talk.
- Tell stories about what you or your chapter are doing locally to impact people with disabilities.

You can also ask other organizations, sponsors and supporters to share your page to increase exposure.

Purchase a Domain Name

Some team members have had success purchasing a domain name to make it easy to refer people to their fundraising page. Here, you can do even more to promote your efforts like making frequent blog posts, adding lots of pictures, and sharing details of your journey over the summer.

Just make sure that a link to donate on your fundraising page is front and center. Some guys have linked to their own URL to their fundraising page before the trip and changed it to their blog site instead when it's time to hit the road.

Make a Video

As we look to create more content to support our fundraising efforts, video is driving much of the social media interactions. Showing your supporters what you are doing visually is very powerful.

Keep in mind, much of what is getting shared today is pretty raw. Have a balance of raw video and video that you or a chapter brother with editing skills makes into something that can move the needle on your goals.

Here are some ideas you can use to create some great videos.

- Take a Saturday and produce a video. Talk about why you are taking on this challenge and what it means to you. Have a friend record some of your activities, i.e. training and/or at a Friendship Visit.
- Split up some of the shots mentioned above and shoot quick videos that are raw to speak to why you're doing the trip. They can be quick 30-second updates that speak to your fundraising, training or volunteer efforts.

- Make thank you videos. Post them to FB or send them out via messenger to show your appreciation. You can make these as you take breaks on training rides.
- Share some video on a tough training ride, especially if you encountered any tough weather. These are a great way to make people part of this experience.

You can also add pictures that you may have from your work with people with disabilities

Make a Facebook Page

We have seen some very successful uses of Facebook Pages that were created as a place for a team member to showcase his progress in fundraising as well as share moments from their experiences over the summer.

Some examples of pages created have been “Diego’s Journey of Hope,” “Journey with Nick,” “Michael’s Journey of Hope: A

Instagram Account

Instagram is a great way to visually showcase what you’re doing, but fundraising can be a little tougher. Give an inside look to the work you’re doing. When sending out a few letters, snap a very artsy pic of the return address and talk about the letters going out. When you’re cleaning your bike after a tough ride, snap a pic of the process. Most of all, just make sure you

or pictures and videos that you enjoy from The Ability Experience Flickr, YouTube and Vimeo accounts. Simple editing programs can make an impressive video. When it’s completed, upload it and send the link out. This is one more way to spread the word about your journey!

YouTube:
<http://www.youtube.com/c/abilityexperienceorg>

Vimeo: www.vimeo.com and search for The Ability Experience, Journey of Hope, Build America, etc.

Cycling Trip Across America,” “Support Sean for Journey of Hope,” and “Evan’s Gear Up Florida.”

When creating a page make sure you keep it active and promote it when talking to the media. Ask them to share the page on their social media for a way to follow your experience and donate.

engage with the experience as you normally would.

For fundraising, the easiest way is to add your fundraising link to your bio and reference it every once in a while. Don’t be afraid to mix it up. If you make a video, go ahead and change your bio link and let people know. Just don’t forget to come back to update it to your fundraising page.

Create a Hashtag for Yourself

Hashtags can be a great way to keep your content searchable and organized. By using a hashtag in all of your social media posts, people can click that tag and see all of your other posts. Use #AbilityEXP #JOH2018, #GUF2018, #BAM2018 as well to get more followers. A couple of good

examples of hashtags could be #BensJOH or #evGUF, etc. There are many services and apps out there for automatically sharing posts to multiple social media accounts. This will maximize your reach without adding much time and effort for you.

XIII. PUBLICIZING YOUR EVENT

On Campus

While campus fundraising may seem tough because as a college student you know that your friends aren't exactly walking around with fat wallets waiting to donate to your cause.

There are some organizations however that you can connect with and make a huge dent in your fundraising goals.

Sorority Presentations

Sororities are hit up all the time from fraternities, right? War of the Roses, Derby Days and just about every other fraternity sponsored philanthropy. This is where the "no chapter help" rule can help you. You are asking for their support of your individual commitment.

The best way to fundraise is to attend their chapter meeting or dinners. Bring props with you (bicycle, maps, etc.) and have personalized brochures to pass around. Ideally have your PowerPoint presentation set up so you can show them exactly what you are doing rather than just talking about it. Some of The Ability Experience videos will hit home on what the experience is about as well.

For any sorority that donates, you can offer to take pictures with the sorority's flag or giving their hand sign. Be sure that

if you commit to this, you follow through or it will make it nearly impossible for the men who do trips after you.

When you are done presenting, be sure to ask for any help or ideas that the women have of people they could connect you to for fundraising support. Individual members may be able to help you network with other businesses and organizations.

Another great idea that can help you double your funds is to ask the sorority's president if you can pass around letters at the end so members can address them to their parents. Many team members have found that the parents of sorority members are very supportive and willing to contribute to a worthy cause. All you need to do is ask. The best way is to pass around an envelope with a generic letter and ask the women to write a note on the letter and put their parent's address on the front. Be sure to include a return envelope (no stamp needed) or make sure your fundraising link is easy to navigate.

Sorority Events

If your campus is not tapped on sorority events, why not try and get the sororities on your campus to help with, or even, hold an event for you? A few team members have even had sororities make their event

fundraising their own philanthropy for the semester! Car washes, toll roads and raffles are all examples of events sororities could host.

If you do something with a sorority, try to get the event in the local or school newspaper to recognize their efforts. Also, make sure and follow up with a proper thank you.

Helpful Hints:

- Start a competition between the sororities on your campus.
- Offer prizes to the house that contributes the most to your cause: put the sorority's letters on your bike or take a picture of its letters at every state line.
- Have fun and be creative! In both your presentation and your fundraising event involving sororities, be creative and you'll be surprised at the results.

Interfraternity Council & Panhellenic Presentations

Much like sorority presentations, your school's IFC and Panhellenic are great resources for your fundraising. They open you up to a large base of potential donors and make for positive campus relations. Refer to the sorority presentations section on the previous page for tips. These presentations will be very similar.

Many times, team members will write off reaching out to IFC. Remember, this is an effort independent of your chapter's philanthropic efforts. Plus, we'll let you in on a little secret. While fraternities compete like crazy, they have a tough time saying "no" to another fraternity when it is done face to face. A few hundred bucks for one presentation is well worth your time. And if you receive any individual fraternity

donations, be sure to find a way to publicly give that group shout outs on social media or write an email to your Fraternity/Sorority Life Advisor and cc that chapter's president.

Student Government & Other Campus Organizations

SGAs are a great fundraising resource. Many SGAs are required to donate a certain amount of money away to charitable causes. We have had team members receive \$1,000 grants from their student government. Making a presentation to the SGA will not only reach each representative present, it will reach the organization that each member represents.

Many other campus organizations will give to charitable causes. They only need to be asked. Make sure to start with any campus organizations that you belong to and go from there.

Classmates and Professors

Your classroom is a great place to fundraise. Not only are classmates often willing to make donations, they are good people to ask for help in other fundraising events. Professors are often a good source of larger donations, especially if you have a strong relationship with them.

Team members have had great success making classroom presentations. Pick the biggest lecture hall on campus and ask the Professor if you can make a one-minute talk at the beginning or end of class. When you make your presentation, give the class your best pitch and let them know that you will be standing at the main exit (recruit friends to cover other exits if applicable) collecting donations on their way out. Let them know that a donation of any size will go a long way to reaching your fundraising goal. If you get a couple bucks from 300 to

400 people's pockets, you will be amazed how fast that will add up.

School Size and Strategy

Colleges and universities differ in size across the country, and this may impact your fundraising approach on campus. If you are attending a university with a large Greek community, you will have a better opportunity to obtain fundraising donations from other chapters on campus. If your school is in a small town, your fundraising strategy may need a different angle. Analyze your surrounding community at school to develop a strategy for local efforts. If you are having difficulty at your school, you may need to visit larger cities. Remember to reach out to The Ability

Experience staff if you feel like you are running into any unique issues. Chances are we have helped someone through a similar situation and we can make the process easier for you.

Your fundraising campaign will flourish if you make the effort to use the media. While getting an article in the local paper will not mean hundreds of strangers are going to send you checks, it does expose the trip to potential sponsors and helps to legitimize your fundraising campaign. When you go to a Civic Club or bike shop, even though they may not have heard of The Ability Experience, reading about your efforts in print will help them trust you more quickly.

Chapter Alumni

Alumni Contacts

Your chapter alumni are some of your best contacts when fundraising. They are likely to already know about The Ability Experience and what you are doing. This will make for a much easier sell. If alumni are unable to donate themselves, they will have many contacts that may be able to help you in your fundraising efforts. Do not be afraid to utilize the network your fraternity has provided you.

Alumni Events

Alumni events are a great place to solicit a lot of alumni in one place. Homecoming, Founder's Day and Rose Ball are three of the main events team members use each year to talk to alumni. Make sure you coordinate with your executive council or the event organizer to secure a time to

talk beforehand so they can put you in the schedule of events. Remember that what you are doing is a source of pride to the entire chapter, both alumni and undergraduate. You can also make presentations at similar alumni events (golf tournaments, barbecues, etc.).

Alumni Letters

Historically, team members have had mixed success with alumni letters. We recommend limiting your mailing list to recent alumni (from the past four years), any alumni that you know, or alumni that have a history of giving in the past. Your best bet is to have an article in your chapter's alumni newsletter, or include a letter in their alumni mailings. This way the chapter will cover the cost of the mailing and you are sure to reach all the people your chapter has in their database.

Civic Clubs

Civic clubs have been one of the common threads in the success stories of previous team members' fundraising. A civic organization is any club or group that exists to provide community service activities. Civic organizations are a terrific fundraising source because they raise money throughout the year to support charitable efforts.

The prominent businessmen and women of your community are most likely members of a civic group. They control most of the money in your community and love to hear local success stories. These organizations represent the potential for the large sponsorships that could get you to Orientation. If you are looking for a way to take large chunks out of your fundraising goal, this could be the key!

On your trip home over spring break to meet with many clubs. You can even give an update to your donors and ask if anyone has any contacts. While you wait for Spring Break, you can do the same in your university town.

At the meeting, be yourself. It is okay to be nervous! They will appreciate your effort and realize that you are not giving them a 'canned pitch.' It is important for you to be enthusiastic! Stress the adventure involved with your endeavor and how you're excited to help those with disabilities. Finally, don't forget to ask for their financial help and be sure to follow-up with a thank you note!

When setting up your presentation, be sure to find out how much time you have. Sometimes they will just have you say a few words at the end of the meeting, other times you will be the keynote. If the latter, be sure to allow enough time for questions. If you don't know the answer to something, don't try to talk your way

through it. Inform them that you can find out and get back with them.

Sample request:

"Thank you very much for giving me the opportunity to speak today. I am extremely excited about the adventures that await me and I look forward to representing the University of Washington and the City of Seattle this summer. I believe strongly in what I am doing and I hope you will join me in my efforts on behalf of people with disabilities. To date I have raised \$_ from family, friends, and my peers at school. I am hoping to raise an additional \$1,000 from clubs and organizations in the Seattle area. A donation of \$500 by your organization will be a huge step in helping me reach this goal. Only \$5 from each person in this room will have a tremendous impact on the lives of some very special people."

Many team members have received donations from the organization and from individual members. Make sure they realize that a small donation from each member will make a difference in your fundraising efforts.

Helpful Hints:

- Follow up is very important. Send a letter thanking them for giving you the opportunity to speak. Let them know they can contact you if they have any more questions.
- Schedule a time to check back with them if they need more time to decide. Nothing is more frustrating than waiting to hear back.
- Always find time to practice your presentation. The more time and effort you put into your

presentation, the more effective you will be!

- Don't limit yourself to Kiwanis, Rotary and Lions clubs. Any organization is a candidate for sponsorships. If they don't give as an organization, at least you have a large group of individual donors you have now spoken to. You will find there are many, many more organizations out there!
- Bring extra letters that have your contact info on it so you can hand them out to people that are interested individually in supporting you.
- Bring your bike! It is always fun to have a prop and is an easy icebreaker. Be sure to get there early and put it in a spot that is

easily accessible for your presentation without disrupting the lunch.

- Remember, if you are curious whether a group would donate, the best way to find out is to ask! Don't get discouraged, not every presentation will be successful. However, hard work and persistence should pay off in the long run. Each year many team members receive up to \$500 from civic organizations. You can too!
- When you're done with the trip, be sure to contact the club to do a follow up presentation. If you are in your college town you're paving the way for some easy funds and if you're in your hometown, you will be a point of pride!

Media & Public Relations

There are four basic mediums used in public relations: the newspaper, radio, television and special networks (the internet, newsletters, etc.). The following step-by-step guide will not guarantee success, but will increase your odds when you add in some hard work.

1. Search for a list of local media outlets. Put their info into a spreadsheet. Include the name, address, telephone numbers, email and special instructions.
2. Once your list is complete, call the media source and get the numbers for the assignment editor/producer.
3. Email a copy of your personalized press release and the fact sheet to the editor/producer.
4. **Don't forget your school newspaper!** This is a great way to get a win early. Ask friends if they know any writers that may help get your story published. This is also a great opportunity for a follow-up article (that happens to coincide with fall recruitment).
5. Take an extra step for television outlets and look for shows or segments that could be a good match. Many times, local stations have a "Today Show" format that are looking for great stories to share. Search online or call the station to ask for the name of the producer. Emailing the producer directly will get you past the newsroom, which does not typically schedule interviews.

6. Follow up that day with a phone call if you're emailing general email boxes or news desks. Once the small talk is done, ask for the interview. As they say, if you do not ask, you do not get!

This is the most important step!

7. If you can't get the interview, offer to drop by their office. If that isn't an option, simply ask them to run a story on you from the information you have provided. This is great especially for newspaper. Be sure to provide a picture of yourself with your bike.
8. Within 2 to 3 business days write a short, handwritten note thanking the editor for their time on the phone or for the interview. If you didn't get the interview, this touch might be what gets you in the door.

This system is not guaranteed, but it's the way the system works. **Remember, the follow up call is essential to the entire process.** Don't send out your information and wait for the media to come banging on your door, because they won't.

Helpful Hints:

- Make sure that you are using people first language when referring to people with disabilities.
- Do not make up answers to questions you don't know the correct answer to. Simply tell them you do not know but you can get them the answer right away. Be sure to follow up.
- Meet with your school's public relations department. They can be extremely helpful in finding contacts for each newspaper, television and radio station. Many departments will also help you write your press release and circulate on news wires and through faculty and alumni publications. Remember, positive media exposure for you is also good Public Relations for your university.
- Ask the reporter to add your contact information and fundraising link. Many times, they will mention major sponsors that have already helped you out.
- While the challenge of your trek is what many will focus on when asking your questions, be sure to tell the reason why you are taking on the challenge.

How does getting my cause in the news help me?

Getting your name in the media accomplishes many different goals, and we have discussed a few. Here is a recap with a few additions:

1. Raising awareness for your efforts
2. A reliable source of information that can be used in other fundraising efforts
3. Thanking sponsors

Should you have any questions or need any support when dealing with the media, please contact your assigned staff member who will work with you and the Pi Kappa Phi communications team.

Sample Press Release provided in the Participant Center Resources

XIV. SUBMITTING DONATIONS

Every donation made to The Ability Experience is tax-deductible. We are a government recognized 501(c)(3) nonprofit organization. **Our tax-id number is 58-1588777.**

Donations to The Ability Experience can be made three different ways:

1. Online credit/debit card donation via your fundraising page
2. Checks mailed to our office (with YOUR NAME & EVENT in the memo)
3. Over the phone check or credit card donation

Mailing Address & Contact Information

Please mail all checks to:

The Ability Experience
2015 Ayrslay Town Blvd. Suite 200
Charlotte, NC 28273-4068

To donate by phone or for other questions, please contact us at:

(704) 504-2400

Online Donations

For online gifts, there is nothing you need to do. If completed through your fundraising page, you will receive credit and your page will be updated. If you ever see a discrepancy between your page and what we send out in email updates, please let us know immediately.

All donations not made through your page will be imported into your fundraising page after we receive it in our office and process it.

Cash Donations

If a cash donation is received, please be sure to collect the donor's contact information (name, address, email and phone number) so they can be properly acknowledged for the donation. Take the cash to your bank and have a cashier's/certified check made so you can mail it to the office. **DO NOT MAIL CASH!**

Please mail any donations you receive a couple times a week. You do not want to hold checks for too long. When your donors write you a check, they expect the check to clear their accounts quickly. Every year we get calls from angry donors that their checks are cashed months after they sent them in. Please help us keep your donors happy!

When sending in checks, each check must include YOUR NAME and EVENT on the memo line. This will ensure it gets credited to your fundraising total.

The Ability Experience will send a receipt--for tax purposes--to anyone who contributes \$25 or more.

Special Considerations

What if a check is made out to you personally or to Pi Kappa Phi?

All you have to do is send it in—super easy! Please do not cash checks written out to you and then make a donation online.

If someone writes a check to Gear Up Florida, Journey of Hope, or Pi Kappa Phi, go ahead and send it in as you normally would and we will take care of it. We have not had any issues depositing checks made to affiliated organizations.

How do I handle donations to multiple team members?

If you have a check that is intended to support multiple team members, simply include a note with the check stating the names of the team members and how you want the check divided.

(PRO TIP: If you, your parents, or any of your donors have any questions about your fundraising or donations, call Terrie Smith at 704-504-2400 Mon-Fri, 8AM-4PM EST)

XV. MATCHING GIFTS

When brainstorming your list of potential sponsors, try also to remember what your relatives, friends, neighbors, or chapter alumni do for a living. Many corporations have a matching gifts fund. For every donation that you receive from an employee of that corporation, the corporation will match the gift. You need to ask everyone who contributes if they work for a matching gift corporation.

You need to follow-up with the matching gifts early. Many matching gift programs only make donations quarterly or semi-annually.

Matching gifts are viewed as a pledge and cannot be counted toward your fundraising total until we receive the check at The Ability Experience office.

How to Make a Matching Gift

Provide these steps to anyone looking to make a matching gift for your fundraising:

1. **Make donation to The Ability Experience** - Please save your tax receipt or email confirmation.
2. **Contact Your HR Department** - You will be asked to complete an online or paper matching gift request form.
3. **Company Contacts The Ability Experience** - Your company will contact The Ability Experience, via mail or email, asking Ability Experience to confirm your donation.
4. **The Ability Experience Confirms Gift** - It can take up to 2 weeks for The Ability Experience to confirm a gift.
5. **Company Sends Matching Gift** - Check distribution cycles vary greatly for companies. (e.g. monthly, quarterly, or semi-annual payouts). Allow 30 - 120 days from mail date to process and display in your fundraising account.

XVI. BUSINESS SOLICITATIONS

Reaching out to small businesses is a great way to raise funds while you're waiting on your fundraising email to do its work or planning is complete on an event. We also have seen this as a great way for parents to work with team members. A parent can go to the list of business you brainstormed earlier (think about where you spend your money the most) a few weeks before spring break. Then when you arrive home you can follow up to answer any questions and see if they will donate.

When you arrive at a place of business, ask to speak to the manager, give your name, and explain what you are doing. Sell them on the commitment you have made and ask if they could make a contribution to help serve people with disabilities.

You will find that many businesses will say you need to speak with a different manager or owner. This is where working with your parents can help. But if this is the case, be sure to get that person's name and ask when they will be in. If they ask you to come back at another time, see what time would be best.

When a business gives you a check, be sure to thank them right away, and give them a receipt for their donation. Leave them with a personalized brochure and a copy of your letter. Be sure to send a prompt thank you note.

If they say no, leave them with a personalized brochure, fundraising letter and newspaper article anyway. You may find that when they take the time to read the information, they may send you a check! At the very least, you have shown that you are a professional!

How do I approach businesses? What should I bring with me when asking for donations?

To be more prepared and professional, bring the following in a professional looking folder/portfolio:

- Journey of Hope and Ability Experience Fact Sheets
- Personalized brochures
- Copies of any newspaper articles, especially a local paper
- A receipt book (purchase at Walmart/target)
- The Ability Experience's IRS letter
- A copy of your fundraising letter

Which Are the Best Businesses to Ask for Donations?

Bicycle Clubs or Bicycle Shops

Bicycle clubs or shops are a terrific resource for two reasons. They can be of value in your fundraising, and they can help you learn more about your bike and offer group rides that will give you experience for the summer. The best way to find your local bicycle club(s) is to go to the nearest bike shop and ask the manager. In most cases, he will know who to contact, and may even be a member himself. Simply explain that you are looking for some guidance in both the training and fundraising.

YMCA / Health Clubs

Like bike clubs, you'll find other athletes and another great network of people in health clubs, recreation centers and YMCA's in both your campus community and hometown. Perhaps you can set up a display in the lobby, or post a fundraising brochure on the bulletin board. Set up a meeting with the manager and ask the club or center for a donation. You might even ask them to match the contributions given by members.

Your Place of Work

Your job is a great place to fundraise. Not only may you get a large donation from the

company or the owner, you can also solicit your co-workers.

Businesses You Frequent/College Area Businesses

Any business that you have a personal tie to will be a great opportunity for fundraising. Most businesses give to charitable causes in some way. Many college area businesses would rather support a student from their campus than someone that is not at all associated with them.

Hometown Businesses

Hometown businesses are a great resource because everyone likes to hear about the hometown boy that made it big or did something great. What you are doing this summer is amazing and you will be a great source of pride for all the people from your hometown as you represent them this summer.

Businesses Where You Have Contacts

Never be afraid to ask your friends if they know someone that is high up in a business. Utilize your chapter brother's parent who is President of a big company or your parent's boss. If you have contacts with influential or affluent people, don't miss the opportunity for a large donation.

XVII. CORPORATE SPONCERSHIP

The best way to secure the bigger gift is by "knowing someone who knows someone" in a corporation or business. Quite simply, you need to ask people who they know. Once you have

a way in, set up an appointment with the key person in a company, and bring a packet of information for your potential sponsor to keep and review once you've left. If possible, have your contact join you during your appointment, since he or she will know the person and can strengthen the personal rapport.

There are two routes you can go with sponsorships. You can get a company to sponsor you individually. You can offer a company access to blog stories they can share with their employees or pictures with a company flag or apparel from around the company.

If you plan to approach a corporation for a larger corporate sponsorship, please contact The Ability Experience office for guidance and check out the corporate sponsorship section on The Ability Experience Web site. If you are in a city that one of the teams will pass through, opportunities exist for getting your sponsor involved with the team.

Remember, The Ability Experience staff is here to help you through the process of obtaining a corporate sponsor. These sponsorships tend to be very detailed and typically involve contracts and/or sponsorship agreements. National sponsorships are more expensive, but offer companies many exciting marketing and advertising benefits.

Don't plan to hit your fundraising goal by asking one corporation for money. Although we hope this happens for you, the chances of going to XYZ Corporation, asking for and getting a \$5,000 contribution without a significant personal connection with the decision maker is slim at best. We have had team members that have not accomplished their goals because they held out for the big donation (and didn't do any other work). Don't let this happen to you! You need to be continuously planning and implementing other strategies to reach your goal. That way your fundraising commitment will be reached, and if a corporate sponsor comes through, you'll go well over the top!

Corporate Sponsor Policy:

If a corporate sponsorship is initiated by a current team member of an Ability Experience team event, the team member will receive up to **100%** of the cash sponsorship towards their individual team member fundraising goal that is stated by the team events staff.

In kind / noncash donations do not count toward a team member's fundraising goal unless they are budget relieving for the organization and align with the gift acceptance policy.

Signage

Each year we receive several calls regarding placing the logos of individual sponsors on team events promotional materials (jerseys, work shirts, brochures, etc.).

Signage on all team event sportswear and banners is reserved only for the national event sponsors (contact The Ability Experience office for more details).

Team members can put the logos of their personal sponsors on their helmets and bikes. Some have worn the letters or logos of the sorority or business that donates the most money to their cause - creating some competition among sponsors.

Just remember not to get caught up in providing benefits to your sponsors. You need to sell them on the cause, not what they can receive.

XVIII. TAX DEDUCTIBILITY

What does “tax-deductible” mean?

A tax-deductible contribution is a payment a donor makes to a charity. For your purposes, it is any donation you receive to benefit your fundraising efforts. The payment is received and recognized by the Charity for the donation to be considered tax-deductible.

Do yourself a favor; read through this section fully and then begin to ask questions. By doing this, you are going to save yourself the headache of trying to interpret IRS law and, more importantly, you will have answers when you approach potential sponsors who want to donate to receive the tax benefit.

The IRS report on the Deductibility of Payments Made to Charities Conducting Fundraising Events states:

“To be deductible as a charitable contribution for Federal income tax purposes under section 170 of the Code, a payment to or for the use of a qualified charitable organization must be a gift. To be a gift for such purposes in the present context there must be, among other requirements, a payment of money or transfer of property without adequate consideration.”

“As a general rule, where a transaction involving a payment is in the form of a purchase of an item of value, the presumption arises that no gift has been made for charitable contribution purchases, the presumption being that the payment in such case is the purchase price.”

“In showing that a gift has been made, an essential element is proof that the portion of the payment claimed as a gift represents the excess of the total amount paid over the value of the consideration received therefore. This may be established by evidence that the payment exceeds the fair market value of the privileges or other benefits received by the amount claimed to have been paid as a gift.”

Essentially, this means that for a contribution made to The Ability Experience to be tax-deductible for the contributor, he or she cannot receive in return any item, service (car wash, lawn mowing, etc.) or privilege (admittance to a theatre, concert, banquet, etc.) which has a fair market value that equals or exceeds the amount or value of the contributions. Only the amount of the contribution above fair market value of the item is considered to be tax-deductible.

The IRS Letter

The IRS letter does two things. First, it recognizes The Ability Experience as a **501(c)(3)** organization. In layman's terms this means that The Ability Experience is a nonprofit organization and individuals who donate can receive tax benefits from their gift. The second thing the IRS letter does is state our Employer Identification Number (EIN). Our EIN is 58-1588777.

What documents do I need to give sponsors?

In most instances, giving the donor a written receipt and the IRS letter will be all that you need to give. The Ability Experience office will send all donors who give \$25 or more a written acknowledgement that no goods or services were received for their donation.

Many potential donors will ask for the IRS form or EIN number before they donate. It is fine to give that to them. Also, let your sponsors know that they will receive a receipt for their donation from The Ability Experience.

IRS Letter provided in the Participant Center Resources

Tax Deductibility Example

The local bike shop gives you a bike and other bicycle equipment at cost or free. Is their donation tax-deductible?

Because the bike shop is giving the bicycle to you and not the organization, their donation is not considered a charitable contribution. They may consider it a gift, but the limit of deduction for a gift to one person is only \$25. It is best to advise the bicycle shop that although their gift would not be tax-deductible, they are still helping a wonderful cause.

The Basic Rules of Tax Deductibility

1. If you are going to promote tax deductibility during your fundraisers, it is your responsibility to inform the contributor as to the information in this section.
2. If you have a situation in which donations will be tax-deductible, you must clearly state this fact on any printed materials (tickets, flyers, etc.) along with exactly how much of a contribution will be considered deductible.
3. Amounts paid for raffle tickets, regardless of whether one wins or not, are never considered tax-deductible.
4. You can buy a simple receipt book at any drugstore or discount store (i.e. Target, Walmart, etc.), or you can just create one on your computer and fill it in. Include who you received the money from, how much you received (the tax-deductible amount only), the fact you received the money on behalf of The Ability Experience, Tax ID number and sign your name at the bottom.
5. Always feel free to call The Ability Experience office with any questions concerning tax deductibility.