

# Fundraising Guide for Local Sections

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# Fundraising Guide for Local Sections

## Document Overview

The Career Education and Operating Council (CEOC), is one of three councils that are charged with carrying out the Institute's Board of Directors (BoD) policies for the betterment of the membership. As a result of data obtained from annual Local Section (LS) Reports, it has been discovered that fundraising is a topic which the LS want further information.

The CEOC was charged with developing a LS Fundraising Guide and produced this guide in 2012, and updated by the Local Sections Committee in 2016.

The developers of this guide do not claim that it is all inclusive with regard to possible fundraising activities or that any or all of the activities are applicable to every LS. Instead this guide should be taken as a "road map" for consideration and to spark ideas within the LS.

Regardless if you find this guide of value or not, we welcome your comments and constructive feedback as to its applicability and usefulness. We will do our best to update this guide based on the comments we receive. Contact [localsections@aiche.org](mailto:localsections@aiche.org) with any suggestions.

Being engineers, the committee felt no project would be complete without some type of analysis phase. To that end, a "ranking" scheme was created containing various fundraising activities. The ranking was both qualitative and quantitative in nature. The criteria we developed consisted of "weighting factors" which attempted to apply what is thought of as a measure of the "importance" of the various criteria upon which to judge each activity.

The goal of this guide is to be as applicable as possible to all LS's, notwithstanding acknowledging it could not be "all things to all people".

## Tax Implications of Fundraising

Three of the listed activities could have tax implications - Section Advertising, Newsletter Ads and Local Section Branding/Merchandise Sales. The remaining activities fall within the mission of a 501(c) (3), and are therefore exempt.

The best guidance is the Local Section Officers' Guide available at:

[http://www.aiche.org/sites/default/files/docs/pages/2016\\_aiche\\_local\\_section\\_officer\\_descriptions\\_-\\_final.pdf](http://www.aiche.org/sites/default/files/docs/pages/2016_aiche_local_section_officer_descriptions_-_final.pdf)

There is a lot of information on unrelated business taxable income (UBT) on the IRS website. You may also want to look at the instructions for IRS Form 990-T, which is the form used to report UBT. This is available at:

<https://www.irs.gov/pub/irs-pdf/i990t.pdf>

There is some helpful information under the heading "Unrelated Trade or Business Income" on pages 2 - 3. One should also look at "Schedule J - Advertising Income on pages 21 - 22.

## General Corporate Fundraising Tips

- 1) Assemble fundraising team members as needed, consider at least two members, preferably more depending on scope of fundraising endeavor.
- 2) Define specific activity or activities for which fundraising will be targeted. Be as specific as possible to

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- 5) Identify specific individual(s) to contact at each company and obtain contact information. Particularly helpful are individuals with whom fundraising team members have personal relationships and who can help facilitate/influence the fundraising solicitation within the company.
- 6) Decide on method(s) for making solicitation, e.g., email, letter, telephone call, face-to-face meeting, etc. Personal contact is preferred, but a distribution of methods likely will be pursued to optimize the process.
- 7) Draft generic "talking points" to emphasize during the solicitation "sales pitch." Think of as a "30 second elevator speech" communicating the bottom-line message of the fundraising request.
- 8) Tailor generic solicitation to each company, highlighting aspects that likely will appeal/resonate with them.

Clarify:

- a. The organization you represent
- b. the specifics of the request including the target amount or range being sought
- c. how the company can/will benefit by contributing
- d. the desired time frame to reply
- e. Contact information for replying (e.g. name, email address, phone number, physical address)

Recommend to limit to one page for email or letter. See "Example\_Solicitation\_Letter" for one approach.

Allow 2-4 weeks to receive reply.

- 9) Execute solicitation(s). This is putting the "communication plan" into effect and probably will be divided among the team members.
- 10) Follow-up is acceptable to thank for reply (for making contribution or for considering solicitation). The latter may plant the seed for opportunities of support for future fundraising requests. Follow-up may also be appropriate to give gentle reminder about providing a reply. Use appropriate methods considering degree of receptiveness to request.

Follow-up to **confirm receipt of monies**. Communicate receipt of check, goods/services provided, etc., and extend another "thank you" for support.

### Newsletter Advertisements

Solicitation of ads for a section newsletter or membership directory can be an effective means of raising funds for the section. Many local vendors would welcome the opportunity to get their name out to potential clients. Equipment vendors, engineering companies, etc., can be particularly effective.

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## Hosting a Symposium/Trade Show

The Northern California Local Section of AIChE (Norcal) puts on an annual Symposium as one of its major fundraising efforts. The Symposium is essentially a combined trade show/ continuing education event that caters to professionals and students throughout the San Francisco Bay Area. Some of the elements that enable this to work for Norcal are:

- x The area has a critical mass of industry, universities and people to enable an event of this size to occur.
- x This critical mass allows for them to have multiple vendors from different product lines, speakers readily available, and an audience that likes the product.

Smaller sections may want to consider a variation of this effort, for example hold a trade show or a training event. Regardless of the scope, the tasks required for a successful event are similar, and hence this document is designed to give the reader ideas on how they may want to run a similar event.

- 1) Put together a committee for running the event. Norcal typically uses three people, but the number really depends on the bandwidth of the individuals.
- 2) Decide on a theme for the event. Successful themes for Norcal have been Biotechnology and Green Technology, however, interests probably vary by geography and industry in the area.
- 3) Identify a venue for the event. NorCal has MC /LBonTj0 Tc 0 5Csidreto0 -0.00e(e)9(a)n9(t)esTJ07(r) 0.229 0pa

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Historically, the annual Symposium has funded Norcal's college scholarship program; requiring funds between \$5000-\$8000.

## Branding/Merchandise Sales

Branding/Merchandising serves the purpose of getting the section name out to potential and current members and providing a way for section members to "connect" and be recognized as being part of the organization. Nearly every company uses this method to get their name out through the distribution of company logo shirts/hats, etc. These articles can also be used to commemorate milestones in an organizations history.

### Selection of Merchandise

The selection of merchandise should be in keeping with the professional nature of the organization:

- x "Golf" shirts and ball caps are in keeping with a professional organization and are most likely to be used by the members on a regular basis.
- x Use of the AIChE and its logo are protected by copyright laws and should not be used by any local section. Local Section designed logos are a good way to "brand" your merchandise and advertising your specific organization. Ex: Texas Local Section of AIChE, AIChE Texas Local Section, etc.
- x Commemoration of milestone events can make popular merchandising items (anniversaries, etc.).

### Quantities/Sizes/Styles

Some key factors to consider when ordering:

- x Consideration should be given to ordering quantities so as not to have to maintain a "warehouse" of items which can be burdensome to the section – while at the same time having enough on hand to service the membership. Pre-ordering is a good way to insure that you do not get "stuck" with extra merchandise.
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3 Months	Produce a brochure that explains and advertises the golf tournament in a concise and easy to read format. Include the registration web site in the brochure along with contact information.
3 Months	Don't forget to get golf tournament sponsors and order course signage early. It can take some time to get all your logos in proper format for your sign printer. Be sure your tournament sponsors approve their logos before the signs are printed. Most companies are very specific about their logo and expect everyone to follow their guidelines.
3 Months	Decide on content of "goodie bags" or tournament giveaways. Embroidered golf shirts, hats, tees, balls, etc. Also, consider bottled water and sunscreen packets. Order your golf tournament awards early.
3 Months	Design (or purchase) a database on your computer for your registration process to help you track your players and pair the teams. Be sure the pro of the club has this information at least two days prior to the event.
2 Months	Be sure your golf staff is easily recognized with a special color golf shirt or hat.
2 Months	Make a checklist of everything that has to be done on tournament day and delegate out each part of the list. Get an early start.
Day Of	Provide the players, the day of the golf tournament, an easy check-in system and be sure they have the necessary tools for play (tees, balls, score cards, etc.).
Day Of	Be sure to provide proper nourishment on the course. A variety of snacks and drinks should be readily available at various points on and around the golf course. You must check course regulations. Some courses do not allow outside food and drink.
Day Of	Plan for the unexpected, such as weather issues, course problems, staffing shortages, injuries, etc. Have on hand brochures explaining good golf etiquette and golf safety.

### Helpful Links

[Scramble Tournaments](#)

[Best Ball](#)

[Callaway System](#)

[Most Popular Golf Tournament Formats](#)

[Golf Tournament Formats/Side Games Glossary](#)

### Dinner Meeting Action Planning

Dinner meetings can serve a dual function of providing a service to members in the form of informal education, and providing the local section with an income stream for other activities. The following highlights some practices that have wo3(i)-9 Tdg.349 4(n)-9( t)c OT 2 v9in L

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PowerPoint slides can enhance a presentation, the ideal speaker will talk to the points, and not read off of the slide.

- x Is a potential headliner. People like to hear from influential people and thought leaders.

## Dinner Meeting Location

Some key factors to consider when selecting a venue:

- x Select a place that is central to the target audience and convenient for the speaker. It is critical to have both.
- x Select a place that serves good food, but is not extravagant. Micro-breweries, Hotels, or Restaurants with meeting areas usually work well. For meetings that involve recognition or awards, it is encouraged to find a more "up-scale" to reflect the importance.
- x Assure the location has adequate parking and is easily accessible. For larger metropolitan areas, consider the traffic patterns that will affect the commute (i.e. during rush hour).
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encouraged to request funds to help support innovative activities designed to increase membership participation.

Click on the [link here](#) for more information on these two grant programs and on how to apply for them.

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## Appendix

### Solicitation Letter Template

<Local Section Name>  
<Local Section Address>

<Date>

Dear \_\_\_\_\_:

For the first time ever, the <Local Section Name> is hosting the <Event Name>, which will be held at the <Venue Name> in <City> on <Event Date>. <Describe purpose of the event, who is expected to participate, and how many expected to participate>.

The <Event Name> opens <Event Date> with <brief description of agenda and event highlights>. The event planning is being coordinated by <role of organizer with section or name of committee>. Registration fees will cover <XYZ expenses>. However, to help make the event as effective as it can be and to provide an experience that will reflect well on our region, we are seeking sponsors who are willing to help underwrite part of the expenses. Our goal is to secure <total amount> in sponsorships, <amount of other sponsorships already obtained and by who>. We are contacting you to invite <company name> to be one of our event sponsors. We have defined sponsorship levels of <level amounts, ex: \$250, \$500, and \$1000>. Sponsors at these levels will be recognized in