



*Educational
Tours*

EF Educational Tours Fundraising Guide

Getting Started, Tips for Success,
Seeking Sponsorship, Effective Letter Writing,
Grant Writing Tips and Additional Links & Resources

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Get started

Often the most difficult part of fundraising is determining where to start. EF can help! In this guide, we have compiled an extensive collection of ideas, tips and suggestions from EF's fundraising specialists and directly from EF Group Leaders.

Get started today

The biggest piece of fundraising advice we hear from experienced EF Group Leaders is to get started early. The ideas and suggestions listed below will be much more valuable if you have allowed yourself enough time to fundraise effectively.

Hold a fundraising meeting

Once you have your core group enrolled you'll want to call a meeting to discuss fundraising. Make sure that everyone attends the meeting, regardless of whether or not they will be involved in fundraising. It is important that everyone is on the same page when it comes to raising money and how the funds will be divided. At this first meeting you will want to discuss the following:

- **Fundraising ideas.** Brainstorm with your group to determine how many and what types of fundraisers you will be able to realistically organize in the time you have. We recommend hosting at least one large fundraiser, such as an event, and plan to do several smaller activities over time. Check out some of our fundraising suggestions.
- **Your goal.** We suggest you set some kind of goal before getting started. It could be a portion of everyone's program fee, or your group could aim to cover something specific with the fundraising money. For example, you could aim to cover the cost for the group's optional excursion to Versailles. The more concrete your goal is, the more rewarding it will be when you hit it! If your goal is rather sizable, you should set benchmarks to help you track progress along the way.
- **Who will be involved.** Some groups require that everyone participate in the fundraising, while others make it completely voluntary. Either way, make sure that you are clear about how you will track participation and divide the funds earned.
- **Timeline.** Determine when your group will be available for fundraising activities. Look at a calendar and mark off major holidays and other school events to make sure you won't have any major conflicts.
- **Determine the next steps.** Everyone should leave the meeting very clear about what will happen next. If you've delegated certain tasks to others, be sure you have written this down so you know who's responsible for what.

Putting ideas into action

Once you have decided on a few fundraisers, you'll want to act quickly to get them going. If you are able to clearly identify the steps you'll need to take leading up to the fundraising event or activity, you'll find fundraising is not stressful or overwhelming. All it takes is good organization skills from the start!

Taking care of details

- **Fundraising contract.** Create a fundraising contract and have each student sign it. Doing so keeps students and parents on the same page from the beginning.
- **School permission.** Even if you're not holding your event at the school, you'll likely need approval if you want to publicize the event at school. Make sure you understand your school's fundraising policies and seek approval well in advance.
- **Group checks.** All raised money will need to be kept in an account. Most schools have a club account you can use to deposit money for safekeeping until you need it. Use a group check to withdraw money from this account and make a group payment to EF. Record your students' account numbers on a copy of the group check form to help you keep track of individual payments.

Keep things moving

As you continue recruiting for your trip and adding more fundraisers, make sure new participants are kept in the loop regarding past and future fundraising efforts. You may want to schedule a fundraising meeting every few weeks or as needed. Meeting as a group is essential to discuss fundraising progress and keep track of future plans. Don't forget to celebrate your fundraising success as well!

Tips for success

Planning

- Start early! This is the single most repeated piece of advice you will hear from successful fundraisers. It won't seem overwhelming if you plan early and break it down to small tasks.
- Outline your strategy early on and be as specific as possible.
- Less is more. Pick a handful of fundraisers and do them well, rather than try too many with limited amount of effort available for each one.
- Be realistic. Try to be objective when deciding how much you can really do with the amount of time you have. Being overambitious may lead to fundraising burnout.
- Use your networks! Have everyone in the group consider who they know. Every connection is valuable.
- Do some research. What fundraisers are already done in your community? How successful are they?
- Avoid risk. Don't buy 500 cases of chocolate bars unless you are absolutely confident you can sell them! Be careful not to put all your time and resources into one big event.
- For events, think word of mouth. What will attract people's attention in your area and get them talking? A successful fundraiser will generate excitement and enthusiasm within the community.
- Know all the rules and policies for your area. You may need a raffle or permission to sell on school grounds.
- Be prepared. Have an event already in the works when approaching businesses and local companies for donations. If they seem hesitant to donate outright, they could at least participate in your fundraising event.

Managing volunteers and travelers

- Explain early on how the money will be divided. Some group leaders come up with a points system that allots a certain amount of money for each hour worked. However you go about it, make sure everyone is on the same page from day one.
- Delegate! Consider the skills of everyone involved. Who's great at networking? Negotiating? Presenting? Event planning? Letter writing? Play up everyone's best skills and make sure everyone has a piece.
- Give people a project to own. This is better than having too many people involved in a lot of different projects.
- Be sure to include a fundraising dos and don'ts discussion. This might be a good opportunity to talk about successful approaches, best practices and other tips for first-time fundraisers.

Motivating volunteers and travelers

- Set a goal early on and create a visual to track progress.
- Remember to keep the end goal (travel!) in sight. Maintain excitement about your tour so people remember what they're working toward.
- Keep energy levels high by communicating before, during and after the fundraiser. Remind parents, teachers and students of the fundraiser's goals and deadlines, and be sure to provide frequent status reports and updates if you're working on a more involved fundraiser.
- Get the parents involved. Make sure they see the value of fundraising beyond the dollars they will raise for their children's trips.
- Celebrate milestones! When you have reached a portion of your goal, be sure to congratulate the group and help them see what their efforts mean. For example, if the group just earned \$50 per person, help them see that everyone just paid for their afternoon horseback riding in Costa Rica. Use this benchmark to get excited about what you'll be doing once abroad.
- Recognize hard work and show appreciation for your volunteers. Although the participants will likely directly benefit from their own efforts, everyone needs a bit of acknowledgement every once in a while.
- Keep it social. If you can, pair fundraising prep work with a fun activity, like movies (think *Chocolat* for a trip to France) and food.

Organization

- Stay organized! Make sure you have a separate notebook, folder or file for all things fundraising.
- Keep a ledger or excel list for everyone involved in each fundraiser, including how many hours worked and how much each student earned (if applicable).
- Keep a contact list with everyone's updated emails and phone numbers. Make sure everyone can reach you as well!

Getting and keeping sponsors

- This is sales. Basically, you will need to sell people on the concept of educational travel. What does this mean to a child's education? Be sure to explain, but be succinct.
- Show potential donors how their money will make a difference. Be specific!
- Always have info available on your trip. A paper handout could suffice or you could do a slide show or presentation.
- Know your prospective donors. Do some research so you use your time wisely and to keep your pitch from sounding generic.
- Think from their perspective. Consider: Why do people give? For some, it may just be the warm glow feeling, so make sure they realize how much this trip means to the travelers.
- Give something back. Don't forget to thank the businesses and individuals who have supported your group. You might consider:
 - An on-tour blog to keep sponsors linked in to the trip
 - A postcard from your trip
 - A framed photo and thank you letter
 - T-shirts with your sponsors' logos on the back
- For more information, see the "Seeking sponsorship" section on page 6 of this guide.

Saving and managing money

- Minimize overhead costs by using donated space, products and expertise wherever possible. Most things can be donated for your event. You just need to let people know you are looking for sponsorship.
- Whenever money is involved, experienced fundraisers say that two people should share the job of handling the money.
- Keep track of everything. Make sure you know where every dime comes from. This will help divide the fundraising money later on, and it will also be useful when you're sending your thank yous!

Seeking sponsorship

There are a lot of scholarship and grant opportunities out there. You just need to have a look!

Stay on topic

- Search for organizations that have a vested interest in your goal—to get your students abroad to experience other cultures! For example, one group leader approached the local VFW to sponsor the cost of the students' optional to Dachau Concentration Camp. Some of the members were involved in liberating this specific camp and others like it. They were glad to sponsor the opportunity for the students to see this firsthand.
- Many scholarships at the high school level must be applied to post-secondary education. Be sure to check out the specifics before going through the application process!

Keep it local

- Many grants and scholarships are region specific. Keep this in mind when searching for opportunities.
- Don't forget to contact your local service clubs, such as the Lion's Club and Rotary Club, to see if they have an applicable scholarship or would be willing to sponsor your students. If they are unable to provide a monetary donation, see if you can piggyback onto one of the club's events.
- Approach businesses in your community for sponsorship. In exchange, offer them advertisement on a group T-shirt the students wear at fundraisers and on tour. Or offer to display an advertisement with their business information at your public fundraising event.

Non-profit resources

http://www.managementhelp.org/strt_org/strt_np/strt_np.htm

<http://www.ctnonprofits.org/pages/NonProfitResources/StartNonProfit.asp>

<http://www.snpo.org/resources/startup.php>

<http://www.wikihow.com/Start-a-501c3-Nonprofit-Organization>

Non-profit status

- You may find that some grants require non-profit status. Albeit a bit tedious, we've heard reports from group leaders that the process to become a non-profit is not actually difficult. It just requires some time. This is especially helpful if you plan on establishing a long-term travel program at your school.
- Some benefits are access to venues, such as concessions, designated for non-profits only and tax exemption on the supplies you purchase.

Think outside the box

- Your group is full of talented students! Encourage them to use their talents to help raise funds. Look for photography, essay and art competitions. These usually have cash prizes that the students can apply to their tour while doing something they enjoy!
- Travel for Education state tax write-off. Some states allow a tax write-off for contributing towards an educational travel program fee. Check with your tax professional to find out if this exists in your state!

Effective letter writing

Basic tips

- Keep it short! People's time is their most valuable resource, so don't waste it on words that don't ultimately matter.
- Assume that people won't respond or even read your letter. Your chances are better if you hand deliver it or can in some way make the info more personal.
- Offer something in exchange for their donation. (A photo or postcard is nice, but free advertising or publicity is probably going to elicit a better reaction.)
- Make sure you know what will happen to the donations if the trip is cancelled. (You don't need to bring this up, but be prepared to answer.)
- Effective messages do not come in one-size-fits-all packages. Know your audience!
- Be very transparent in regards to what your total goal is. Goals should be concrete, measurable, achievable and worth doing.
- Be bold. It's absolutely necessary if you want to catch someone's attention.
- Make sure your letter is centered on the donor. What will motivate them to act?
- Write from one person to another. Your letter should sound like it came from a friend or family member.

How to start your letter

- Tell a story. Is there someone whose life has been changed by travel? Could you paint the picture of someone who is experiencing Rome for the first time? Start with an inspiring or provoking story to pique your reader's curiosity.
- Write an overline. This is a short phrase at the top of the letter that serves to catch the reader's attention. For example: How can I describe the look on a teenager's face when he sees the Colosseum up close? It shouldn't say anything about needing money or supplies donated. Save that for later!
- Ask a provocative question to engage your reader
- Quote someone or find a one-line zinger. Think of it as bait!
- Present an interesting fact. For example: A recent poll by the National Study of School Evaluation found that 94% of students said their international experience increased their enthusiasm for learning.
- Get right to the point. Remember: You want to keep this letter as short as possible.
- Don't start your letter with "Dear friend."

Basic questions to address

- Who is your target audience?
- What do you want them to do?
- What's in it for them?

Additional questions to consider

- What doesn't the reader know? (Probable answer: everything.)
- Why should they care about us and our mission?
- How will they respond? (Make it easy for them to donate.)
- What's the first thing they'll see and read? (What's the "hook"?)

Your goal

Convince people of two things:

- Educational travel is important (and why)
- Their donation, regardless of what it is, WILL make a big impact in these students' lives.

Customizing the message

- Have a template, but resist the urge to use it! You will end up saying the same info over and over again, but you will want to customize your message as much as possible. Templates are usually too generic and your readers will see that.
- Segment. Divide everyone into smaller, more manageable target audiences. Each group should share certain traits.
- What's the big message? Make sure your letter has one clear, big message. If you can get the recipient to hear and understand the big message, you will be more likely to gain his or her support and donation. An example of a big message: "Educational travel and experience are critical for a child's growth and success in today's globally focused world".
- Make sure you say "you" a lot. This can be used in place of the more general "the community" in many cases and is much more effective in establishing a personal connection.

Who to approach?

- Any business where you have a connection. Check with the group and parents in early fundraising meetings to see where you might have an in.
- Any local business or individual with an interest in supporting community programs, local schools, etc.
- Anyone in the education field
- Local leaders

Grant writing tips

Grants are sums of money that are awarded to fund a specific activity or organization. Grants can provide you with a large sum of money to pay for your group's trip. However, they are not always easy to come by. If you have the time and dedication to locate grants that will support your cause and the patience to write grant proposals, they are great ways to fund your group's travel.

How to begin

- Define your goal and search for a funder who supports it. You need to be able to explain why you are traveling with your students and seeking funding to do so. Your mission and goal are important to your funder. EF's mission is "to inspire the next generation of global citizens by breaking down barriers of language, culture and geography." What is your mission?
- Research. When you begin your search for grants, you will need to be sure they believe in the mission of educational travel. Begin researching online for grants that are related to education and travel.
- Do your homework. Once you have found some grants, be sure they fit your needs. Study their application guidelines and even call them to clarify your understanding of the guidelines.
- Find continuing support. Grants can range in the type of support they give. You may be lucky enough to find a continuing support grant that can ensure years of traveling with EF and your students.

Things to remember

- It is important to remember that grant writing and final approval can take a significant amount of time, so it is important to plan ahead!
- Ask for help! Finding time in your already busy schedule to write grant proposals may be difficult. Look for someone to volunteer to start your proposal. Grant writers in your area may be willing to donate their time and knowledge to help you and your group.
- Some grants require non-profit status, but this doesn't have to stop you from applying. Get creative and start your own non-profit to support your educational travel plans. There are many online resources that can help you get started, as well as guidebooks.
- Don't get discouraged! Remember what motivated you to give the gift of travel to your students. Seeing your students experience a new culture firsthand will be worth the work!

Non-profit status

For more information about acquiring, non-profit status, turn to page 6.

Links and resources

School grants <http://k12grants.org/>

Grants.gov <http://www.grants.gov/>

Foundation Center <http://foundationcenter.org/>

U.S. Department of Education <http://www.ed.gov>

Grant information for public schools <http://www.edutopia.org/grantinfo>

Workshops, links and resources <http://www.schoolgrants.org/index.htm>

Grant search <http://www.grantsalert.com/>

Additional links and resources

General tips

Best fundraisers for your group <http://www.thefundraiserdirectory.com/art-matching-your-group-with-right-fundraiser.php>)
Fundraising in tough economic times <http://stepbystepfundraising.com/3-suggestions-for-raising-money-in-tough-economic-times/>
Association of Fundraising Professionals <http://www.afpnet.org/>
Good tips and articles <http://www.fundraiserhelp.com/>
Tips for writing effective fundraising letters <http://www.fundraiserhelp.com/fundraising-letters.htm>
Sign up for weekly e-newsletter: <http://www.raisersharpe.com/>
Product sales information, good info and articles <http://www.afrds.org/>

Articles and links

Collection of additional links <http://www.fundraisingpages.com/>
Excellent articles and tips, many other links <http://stepbystepfundraising.com/>
Excellent articles and tips <http://www.onphilanthropy.com/site/News2?page=NewsArticle&id=5448>
Good articles <http://www.fundraisingnetwork.info/>
Good articles <http://www.fundraiserinsight.org/>
Good articles <http://ezinearticles.com/?cat=Business:Fundraising>

Fundraising ideas

Do-it-yourself ideas <http://www.fundraising-ideas.org/DIY/index.html>
Event planning http://www.pta.org/archive_article_details_1176319201953.html
List of fundraising ideas <http://www.fundraiserinsight.org/ideas/>
List of fundraising ideas http://www.fundsnetsservices.com/Fundraising/school_fundraising.htm
Online fundraising <http://www.yourcause.com/>
Online fundraising <http://www.firstgiving.com/>
Raffles <http://rafflesecrets.com/>
Tips for online fundraising <http://www.echoditto.com/best/fundraising>
Tips and ideas <http://www.bestfundraisers.org/>

Books

How to Write Effective Fundraising Letters that Raise Money by Tom Ahern
Medfield, MA: Emerson & Church Publishers, 2007.

The Everything Fundraising Book by Rich Mintzer and Sam Friedman
Avon, MA: Adams Media, 2003.