

Fundraising Guide for Local Sections

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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 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

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 provide clarity and allow focus.
- 3) Set target fundraising level and date for each activity. Consider corporate budgeting processes and timelines. Many companies start budgeting in July of the preceding year time frame for the subsequent year. Quantify as best as possible and temper with realistic expectations.
- 4) Make list of companies to approach. Initially focus on companies within the local section boundaries. Expand to include other companies that may have a special interest in supporting a particular activity.

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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 and software vendors are but a few potential sources of ads. Serving as a "conduit" to connect supplier with customer can be regarded as a service to your members – provided the ads do not substitute for content but are in addition to content. Ads may range from business card size to full page.

Generally only one or two people are needed to solicit ads – however the more members who do – the more likely are the chances of generating revenue.

Solicitation of Ads Plan

- 1) Develop ad pricing guide – business card, half and full pages single issue and multiple issue pricing in the case of a newsletter.
- 2) Select publication method – self-published via the section website or hard copy of newsletter – determine submission deadlines from "publisher".
- 3) Set target publication date (all further activities will be based off of this date).
- 4) Contact potential ad sponsors – solicit ads – provide pricing guide and submission deadline – allow enough time for proofing by the sponsor.
- 5) Submit ad to "publisher" for incorporation into newsletter
- 6) Provide a copy of the final product to ad sponsor if a newsletter.

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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:

- The area has a critical mass of industry, universities and people to enable an event of this size to occur.
- 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 found that restaurants with event rooms, hotels, or small convention centers can work well. Prior to speaking to the different venues, you should have an idea of:
 - a) The time and date of the event.
 - b) The duration of the event.
 - c) How many exhibitors and attendees you will have.
 - d) Audio/Video requirements.
 - e) What refreshments/food you want to have served.
- 4) If you are planning to have a trade show, make sure that you have sufficient space for the number of tables that you will require. Consider the flow of traffic, as well as power requirements that your vendors may require.
- 5) Based on the cost of the event and the number of vendors that you think you can get, determine the appropriate pricing for the vendor tables. Keep in mind that you need to demonstrate the value proposition to them.
- 6) Based on the theme of the event, start to recruit speakers. Generally, people will pay to see or hear the “headliners,” so if you have senior managers or prominent leaders such as professors that are willing to speak, book them right away.
- 7) Determine the appropriate cost per person for the attendees.
- 8) Set up a registration system so people can register in advance. NorCal uses regonline.com. Try to get people to sign up as early as possible so you can have an accurate head count. Publicity is very important. Norcal tries not to register people on site due to the level of effort, but this is totally up to the organizer.
- 9) Once the venue, theme and timing are all set, recruit vendors. After you sign them up, make sure you give the vendors the appropriate recognition.
- 10) Prior to the event, make sure you complete the following:
 - a) Name tags for the attendees.
 - b) Signs for the vendors.
 - c) Programs.
 - d) All audio/visual equipment is working.
 - e) Registration desk is set up.
- 11) Day of the event, you need to have people assigned to the following tasks:
 - a) Registration
 - b) Assistance to vendors (power, moving, etc)
 - c) MC
 - d) Rover – that makes sure everything is going smoothly.

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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:

- "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.
- 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.
- Commemoration of milestone events can make popular merchandising items (anniversaries, etc.).

Quantities/Sizes/Styles

Some key factors to consider when ordering:

- 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.
- Current styles should be selected in keeping with maintaining a professional look.
- Ordering too many or too few of the correct size can be problematic – again taking pre-orders can be the way to alleviate this issue.

Vendor Selection

Points to consider in merchandise vendor selection:

- Local vendors may not be available in all areas. This may require you to seek out vendors who are out of your area. Be mindful of the inherent difficulties of working with an out of area vendor.
- Be sure to carefully read return policies for defective merchandise.
- Consider any discounts offered based on the quantity ordered.
- Be sure to inquire about any "setup" fees and format of any logo artwork to be supplied.

Pricing/Marketing

Develop pricing and marketing guidelines:

- It is important to price your merchandise to sell at a profit but not so high as to be unattractive to purchase.
- You should develop a plan on how you will market your merchandise – section newsletter and website are obvious means.
- Having an example of the merchandise available at meetings can be a good way to allow members the opportunity to see and feel the product before committing to purchase. The vendor should provide a "sample" for approval before "production" and this could be used as the example.
- Having the vendor catalog can also be used to market the merchandise.

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Continuing Education Course/Event

Time Before Event	Advised Activity
3-8 Months	Assemble fundraising team members as needed.
3-8 Months	Consider at least two members, preferably more depending on scope of fundraising endeavor.
3-8 Months	Define specific activity or activities for which fundraising will be targeted.
3-8 Months	Be as specific as possible to provide clarity and allow focus. Set target fundraising level and need date for each activity.
3-8 Months	Quantify as best as possible and temper with realistic expectations. Identify potential course offerings.
3-8 Months	Solicit input from AIChE members. Review course catalogs. Refine list of potential course.
3-8 Months	Review course options at local officers meeting(s). Develop a short list of 4 to 7 courses. Conduct survey of AIChE members to identify interests. Develop a ranking scheme, e.g., ask each respondent to allocate 10 points. Identify preferred courses based on a high total vote and/or a high average vote.
3-8 Months	Make course recommendations.
3-8 Months	Present results of survey at local officers meeting. Determine 1st and 2nd choices. Contact vendor and/or instructor(s).
3-8 Months	Check for potential conflicts (corporate calendars, school calendars, AIChE meetings, etc.). Determine meeting room and instructor availability. Finalize course schedule, class size, and cost. Set financial terms.
3-8 Months	Determine the cost per participant. Establish withdrawal dates and penalties, if any. Announce course offering.
1-4 Months	Send an advanced notice to all AIChE members and allow them to preregister. Make a general announcement about the course and open the registration period. (Note: Be sure to mention that membership has its privileges.) Coordinate course enrollment.
1-4 Weeks	Provide a single point of contact, if possible. Establish a waiting list, if necessary. Make final preparations for course.
0 Weeks	Maintain contact with the instructor(s) and determine their needs. Prepare meeting room. Prepare course materials, if needed. Arrange for refreshments. Conduct course and assist as needed. Be a good host.

Golf Outing

Time Before Event	Advised Actions
6 Months	Choose a golf course and facility that will suit your needs and be sure their staff is accommodating. Meet with the staff and be sure to communicate what you want to accomplish, especially if you are doing a luncheon or awards gathering after play. Also, now is the time to consider how many golfers you will allow. Check with the course on their recommendations. However, for smoother play, try not to book more than 128 golfers per course.

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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 worked well in Local Sections throughout AIChE.

Speaker Recruitment

It is critical to recruit a speaker that:

- Addresses a topic of high interest to the section. Some good topics have been those that give general insight into emerging businesses or technologies, topics that relate to a major employer in a region, or that provide insight that can enhance ones career. Poor topics would be those of very limited interest such as research that has a very limited focus or no application to commercial interests, or topics that cover an industry that is not affected by chemical engineers.
- Has a good record of being an effective speaker. It is recommended that you solicit recommendations from people who may have had contact with effective speakers. While

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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.

- 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:

- Select a place that is central to the target audience and convenient for the speaker. It is critical to have both.
- 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.
- 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).
- Make sure that the place is appropriately sized for the anticipated attendance.
- Avoid scheduling a meeting during known conflicts such a national AIChE meeting or other event that may pull away from the potential audience.
- If needed, make sure that the place has necessary A/V equipment.

Before The Meeting

Some tasks that you should do prior to the start of the meeting:

- Create a registration system that can handle registration payments and create an attendee list. “Registration Online” is a system that utilized by the Northern California-Nevada section.
- Acquire the Speaker’s bio.
- Publicize the meeting through internal channels (newsletters, e-mail blasts, etc).
- Solicit announcements from other officers.
- Prepare name tags of attendees.
- Bring extra tags and pens, as well as membership information for the section.
- Get a gift for the speaker.

During The Meeting

The following agenda works well for dinner meetings:

- First half hour as a mixer/registration time.
- Allow dinner to occur, and start meeting when most people finish main course.
- Begin with announcements and introductions.
- Introduce speaker.
- Presentation.
- Questions & Answers

After The Meeting

- Send thank you note to the speaker.
- Communicate the minutes of the meeting through internal channels. Publicity afterwards is as important as beforehand since it establishes the value of the meeting.

AIChE Grants

AIChE offers various grants to Local Sections to help them promote activities and provide programming to its members.

Two grant programs are in place at this time. The Project Connect Grants and the Program Planning Grants.

The Project Connect Grant is meant to assist local sections with their efforts to reach out to students, and increase membership and participation of recent chemical engineer graduates and new engineers.

The Program Planning Grant has been established to assist local sections with their membership outreach efforts by encouraging development of a program plan that involved more than a single event. Sections are

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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 <where recognition will occur>.

We hope that as a company who employs chemical engineers you will be willing to help support the professional society to which many of them belong by participating as a sponsor of this event. It would be most helpful if we could receive some indication of your intent by <deadline to know if sponsoring>.

If you have any questions or desire addition information, please feel free to contact me by phone at <phone number>. If you wish to be a sponsor, please send a check made out to <Local Section Name> and mail it to the attention of <Section Treasurer's Name>, at the above address. (The <Local Section Name> is a 501c-3 not for profit organization.) Please also include instructions as to how you would like to be recognized: company name and/or logo as well as the name of a person to contact in case we have any questions.

On behalf of the <Local Section Name>, I appreciate your consideration of our sponsorship request and hope that <Company Name> will choose to be one of our <Event Name> sponsors.

Most sincerely,