FUNDRAISING CHAIRPERSON GUIDE

Doing Good Should Feel Good.

Cherrydale
AMERICA’S FUNDRAISING COMPANY®

EXPERIENCE THE CHERRYDALE DIFFERENCE.

Cherrydale.com • 1-866-291-3472
WELCOME! We’re here to help.

Cherrydale is proud to be your fundraising partner! We are here to help you every step of the way to ensure an easy, profitable and fun fundraiser.

OUR MISSION:
“Cherrydale is a trusted and experienced fundraising company that provides innovative services to raise funds and awareness for schools and non-profits to promote acts of kindness and ignite social change, since 1907.”

From all of us at Cherrydale Fundraising

OVERVIEW OF THE STEPS FOR A SUCCESSFUL FUNDRAISER

- Before Kick Off
- Kick Off Assembly
- During Fundraiser
- Order Processing
- Delivery Distribution
- FAQs Printable Reminders
You’ve already taken the most important step to raising money for your school/group...you called Cherrydale Fundraising! Follow the steps below to make sure your fundraiser is simple, profitable and fun!

• Confirm your kick-off date and assembly start time:
  Confirm dates and times with your Rep and the Principal.

• Familiarize yourself with the Chairperson Portal on CRIS:
  7 days before your kick off you will receive an email with your chairperson login and PIN. This portal will include your contract, dates, updated sales, order tallies, etc. It will also include links to downloadable PDF’s to promote your sale, reminders, principal announcements, and more.

• Customize your Group’s Fundraising Site:
  Your email will also include a link for you to set up your group’s site. 6 Days prior to kick-off you must sign in with your chairperson’s email and customize your site. Describe why your group is raising money, upload photos, post updates, and link to your group’s social media feeds. You will also be able to post reminders of sale dates, money collection, and delivery. This will increase your sales, reduce confusion, and build support.

• Create your fundraising support team of volunteers

• Promote your fundraiser and communicate it to all:
  PROMOTION = PROFIT: Put up posters in high traffic areas, distribute flyers to the parents. Many items are available to download from the Chairperson Portal. 2 days prior to kick-off we will send you the “Big Day” email with the video link. This will explain your fundraising purpose, profit goal, and individual expectations clearly. It will also include a link to your group’s fundraising site to encourage parents to register their students online. Be sure to send this email to your families the day before your kick-off.

• Distribute seller packets:
  Packets arrive the week prior to kick-off. Review the materials inside the packets then distribute to classrooms using the classroom counts. For best results make sure the packets go home with students on the day of the kick-off assembly.

• Attend teacher meetings:
  Getting your teachers and staff excited makes your job easier and your fundraiser more profitable. Inform everybody of dates, details, and what the money will be used for. Promote teamwork!

• Collect and prep orders

• Set up delivery and distribution

We Make Fundraising Easy!

7 days prior to your kick-off you will receive a welcome email with everything you need to make your fundraiser a success! There will be easy to follow links that will bring you to your Group Fundraising Site, promotional letters and materials, social media banners, reports and so much more!

Click on Chairperson Login on home page. Enter Login and PIN

Manage your campaign, edit your site and share your fundraiser.

Above: It’s simple to choose your school colors, upload logos and photos and share your fundraising story.

Left: Your school Fundraising Site includes a video, a fundraising thermometer, photos, and recent donations.
How do you guarantee a more profitable fundraiser? Do a live kick-off assembly with your students and staff. Cherrydale provides a professional PowerPoint presentation and videos. Plus your sales rep will assist you!

- **Allow 20 to 30 minutes from the time students are seated**

- **Arrange all props and tools ahead of time:**
  - Microphone and sound system
  - Table
  - Projector and screen
  - Internet connection

- **Hang posters in high traffic areas**

- **Distribute seller packets:**
  Have the teachers hand out the seller’s packets to students before they leave for the day. Remind the students how important it is to register online.

- **Give your promotional pieces to teachers and staff**

- **Have students take their packets home that night**

- **Make sure your instant prize is ready (if applicable)**

- **Schedule your principal announcements and email reminders:**
  Keep the momentum going with targeted messages from the principal or emails you can send from your Group Fundraising Site. You can find scripts for these on your Chairperson Portal in Promote/Remind PDF Downloads.

- **Line up fun principal/staff incentives to get more participation. Here are some examples:**
  - Duct Tape Delights: Have qualifying students duct-tape you or a staff member to the wall! It’s an incentive that will stick.
  - Principal Limo: Decorate a rolling chair like a limo. Pick up the winning student and you push him/her around all day. We will even get you a hat and t-shirt tux to wear!
  - Human Sundae: Qualifying students get to make you into a large and in-charge sundae complete with whipped cream and chocolate sauce. Sweet success with a cherry on top!
  - Water Balloon Challenge: It’s pretty simple...you’re the target and the kids get to throw the water balloons. You could try to catch them and throw them back.
  - Pucker Up: The school reaches its goal and you kiss a pig...or a dog...or a horse...or a goat...or your aunt Myrtle. The kids go “yuck!” and you go “cha-ching!”
  - Principal Sub: Get back to class! Give an afternoon off to the teacher whose class raised the most and you sub the class. A great incentive for the teacher and it is fun for the kids.
  - Silly String the Principal: Think pie, think water balloon. There are no strings attached, except on YOU!

See our Power of 10 brochure located in your chairperson portal for even more ideas!

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**Participant Support Page**

Each student is encouraged to register online and create their own Participant Support Page. When they do, they will be able to create their own Avatar. After they register, they can send a link to family and friends across the country to encourage more purchases.

**Participant Support Page features:**

- Registration on computer, tablet or smartphone
- Student’s Avatar
- Student’s story
- Option to upload photo or video
- List of top and most recent supporters
- Link to send to an email to Family & Friends
- Social media links
During Your Fundraiser

Keep the momentum from your kick-off going until your end date! Cherrydale provides you with many tools to keep up the excitement for the students, staff and parents.

1. Principal announcements, email messages, videos, handouts
   Cherrydale provides scripts for morning announcements. You can find these on the Chairperson Portal under Promote/Remind: PDF Downloads.

2. Put goal posters in the classrooms
3. Do an instant prize to create excitement and instant gratification
4. Create a competition between classrooms with an incentive for the winning class: Ask teachers/staff for ideas.
5. Count down your fundraiser on the school’s outdoor sign and in daily announcements
6. Update progress on social media and the school website

THE END OF THE FUNDRAISER

1. Announce the End of Sale and Order Turn-In Day:
   Put the dates on your Group Fundraising Site, all social media sites and the Participant Support Page. Send an email message announcing the End of Sale and Order Turn-In Day and send a note home with students (download a sample from the Chairperson Portal).

2. Remind teachers/staff to turn in orders on a daily basis
3. Make sure ALL orders have been turned in
4. Organize forms by classroom/teacher
5. Check each form to make sure it includes:
   - Group Name
   - Teacher Name
   - Grade
   - Student Name
   On each order form, write total $ turned in on the CHAIRPERSON USE ONLY BOX so we can provide you with an Exception Report 4 days before your delivery. Write “0” in the box if no money is turned in and immediately alert the family. Log into the Chairperson Portal approximately 4 days before delivery to get your Exception Report as well as to access the PDFs of all order forms submitted, then alert families of any money owed.

6. Tools to make order processing easier:
   - Classroom Roster
   - Extra Order Forms
   - Large Classroom Envelopes
   - Post-it™ Notes
   - Calculators/Adding Machines
   - Black/Blue Ballpoint Pens and Highlighters
   - Stapler
   - Rubber Bands/Paper Clips
   - Copies of Discrepancy Notices (download from the Chairperson Portal)
   - Bank Deposit Slips and Money Bags
   - Bank Endorsement Stamp

Get to know your Chairperson Portal

7 days before your sale starts, you will receive an email with your Login and PIN for the Chairperson Portal. This will allow you 24/7 access to your fundraiser information via the internet.

You will be able to access:
1. Your balance
2. Online sales
3. Your profit
4. Order status
5. Reports for top sellers by students or classroom
6. Back-ordered items by student
7. Packing Slips
8. UPS Labels to send orders in at the end of the sale
9. FAQs
10. Sponsor Guide
11. Downloadable PDFs of hand outs, notes and items to promote sale
Order Processing

Your fundraiser is done. Now you have to prep your order forms and send everything to Cherrydale Fundraising. We provide instructions to print a UPS Shipping label at no cost. Of course, if you have any questions, just call Cherrydale Fundraising’s customer service hotline: 1-866-291-3472!

- Keep seller order forms grouped by classroom and organized by grade order for classroom/grade reports. This is optional. If you do not group your order forms, they will be processed in the order in which we receive them.

- ALL order forms should include the following so we can provide you with complete and accurate reports:
  - Student Name
  - Teacher Name
  - Correct Amount of Money based on customer info submitted
  - Write total $ amount turned in inside the CHAIRPERSON USE ONLY BOX so we can provide you with an Exception Report 4 days before your delivery. Write “0” in the box if no money is turned in and alert the family immediately.
  - Contact Phone Number (Necessary to contact families with questions, pick-up reminders, etc.)
  - If there is a discrepancy with the student’s totals and money included, download the “We Need Your Help” notice from the Chairperson Portal and send home with the Student.

- Helpful suggestions:
  - Write the student name on the memo line of check received. This will be helpful if it is returned NSF (not sufficient funds).
  - Send only the TOP WHITE COPY for processing.
  - Keep the YELLOW COPY for your records (you will need as reference in case an order is missing at delivery).
  - Sort all Classroom Envelopes in grade order and place the envelopes into the UPS box provided.
  - Go to your Chairperson Portal to download and print your UPS label.
  - Be sure to send back the Group Identification Sheet that came with your materials. This will help to easily identify your account.
  - Drop off at any UPS location. Keep a copy of the tracking number just in case you need to track the delivery.

**PRINT OUT YOUR UPS LABEL**

1. Go to your Chairperson Portal and find “Ready to Send Orders Back.” Click on “Click Here.”

2. Fill out the UPS Return Form. Click Submit Form.

3. Click the link to “View and Print your UPS Label.” Print label and receipt.

4. Follow instructions on page regarding affixing label to package. Drop off at a UPS drop box or store.

**Important Information**

To guarantee scheduled delivery, all orders must be sent to Cherrydale on time.

See your contract for your UPS deadline.

Any delay in sending your orders will result in the delay of your delivery.
Delivery Distribution

You are on the home stretch to a successful fundraiser. All that’s left is product distribution/pick up.
Cherrydale Fundraising makes it easy. Check our FAQs on the Chairperson Portal if you have additional questions.

DELIVERY PROTOCOL
- You will need 2-4 volunteers to help with delivery, organization and order distribution.
- Don’t forget to put out delivery reminder notices through emails, school newsletter, school website, school marquee, posters and social networks like Facebook. Your Representative may also do a text reminder to parents.
- Have all of the YELLOW copies of the order forms available at your delivery for reference if necessary.
- Truck will arrive 1-2 hours prior to distribution.
- Locate an entry for pallets to be brought into the school.
- Use the gym or another large space to organize product for pick up.

SORTING YOUR ORDERS

Do FROZEN orders first
- Sort frozen orders first. The boxes are numerical and alphabetical to make it easy to set up. If you submitted your orders in the classroom envelopes, you can also organize per classroom.
- Boxes that contain more than one student order inside will have a MIXED ORDERS label on the outside of the box. Open ALL of the boxes that contain more than one student order. Each student’s order inside will be individually packed and labeled with the student name, teacher and order number.
- Once all FROZEN product orders are sorted in NUMERICAL sequence, sort the DRY/GIFT orders into the same number sequence. Student orders that have dry and frozen products will be labeled with the same order number. Match both the DRY/GIFT and FROZEN orders together by placing one on top of the other.
- Once all orders are sorted into numerical sequence, check through the entire sort to ensure all numbers are accounted for. If a number is missing, so is an order. This is rare, but helpful to know BEFORE order distribution begins.

DISTRIBUTING THE ORDERS
- Some schools find it helpful to send small orders home with students. Distribute those small orders at the end of the day. On the All-Student Alpha list that is included with your paperwork and available on your Chairperson Portal, highlight those students’ names who carry home their orders.
- Larger orders that cannot be carried home by the student should remain in the main delivery area sorted in the remaining numerical sequence.
- Right before dismissal, make an intercom announcement for delivery reminder!

ORDERS FOR PARENT PICK UP
- Have 1-2 tables set up at check-in; one for check in, one for distribution. When parents pick up their order, check off their name.
- Approximately one hour before the end of your delivery time, start sending text messages, phone calls and leaving messages for any order not yet picked up. In your message you should be clear about how long you will remain at the school and where in the building they should go.
- A two hour time frame is recommended for all school pick-ups.

If you need assistance or have questions, we’re always just a phone call or email away.
Call: 1-866-291-3472
Email: sponsor@cherrydale.com
Thank you from Cherrydale Fundraising

Thank you for choosing Cherrydale Fundraising as your fundraising partner. If you have any questions, please call us at 1-866-291-3472. We are here to assist you every step of the way.

Your Representative is: ________________________________________________

Phone: ___________________________ Email: _______________________________

Notes