

PTO Fall Fundraiser Timeline 2007-08

Fall/Winter of previous year:

- Sign contract with vendor (Innisbrook only) and establish sale and delivery dates. Traditionally the sale has begun on the Wednesday of the second week of school, and ended on a Wednesday two weeks later.
- Identify chair for next year's sale before the end of school

August:

- Receive shipment of catalogs and promotional materials (have previously been sent to chairperson's home)
- Attend meeting with local sales rep to preview this year's collection (optional)

First week of school:

- Write and distribute a letter to teachers and staff outlining the details of the fundraiser and offering a "buy one get one free" coupon.
- Write and have teachers distribute a letter home to families describing the fundraiser and reminding them to look for the materials next week.
- Submit a note for next week's Monday Memo publicizing the fundraiser and adding the sale dates to the calendar of events.
- Get class lists from the administrative assistant; place instruction letter in catalog packets, label catalogs with student and teacher name, and separate by class.

Second week of school:

- Deliver catalogs to teachers to be sent home the day the sale begins (or day before).
- Place a set of catalogs labeled "PTO Order" in the staff room for staff to use for the "buy one get one free" offer.
- Shop for prize boxes; assemble prizes and put on display in the main office.
- Put up display on bulletin board using promotional materials.
- Place a labeled box for order collection in the main office.

Third week of school:

- Send home reminder note that orders are due next week
- Submit reminder for next week's Monday Memo

Fourth week of school:

- Orders have traditionally been due on Wednesday; begin collecting orders daily from box in Main office on the due date (many usually continue to come in over the next few days)
- Submit a "last call" reminder for next week's Monday Memo; final order date is usually the Tuesday or Wednesday of next week
- Begin processing orders; it is easier to do them as they come in rather than wait until they are all turned in—that way, if there are problems (which there always are!) they can be corrected before the main order goes out

Fifth week of school:

- Compile and review the "PTO Order" which is generally made up of the teacher orders.
- Continue to process orders and review problem orders with families ASAP
- Innisbrook orders must be submitted to the company by the scheduled date; other companies may be more flexible
- This week or next hand money over to the PTO Treasurer for deposit

Sixth week of school:

- Wrap up "stragglers"—either very late orders or problems that have been resolved. If submitted to Innisbrook online in time these may still be delivered with the main order. Try to avoid placing a "late order", as we will be charged for shipping and this will reduce PTO profit on those orders.
- Tally class totals, including internet orders, and award class prizes
- Work with local sales rep to establish a delivery date for Innisbrook—in general, you want to avoid delivery the week of fall break or on a Thursday or Friday. Deliveries are usually stored in the learning center, and are not really secure there over the weekend.

As delivery date approaches:

- Work with local sales rep to identify exact Innisbrook delivery date; smaller companies (i.e. Dutch Mill Bulbs) will have a separate delivery date, and may ship directly to the chairperson's home
- Place a note in the Monday Memo with projected delivery/distribution date
- Work with staff to identify a secure location for received orders—traditionally the Learning Center (there will be over 100 boxes)
- Call volunteers to help with distribution

Dutch Mill delivery week:

- Receive order either at school or home
- Organize volunteers to help process and distribute orders—we receive the items in bulk and have to separate them into individual orders ourselves.
- Because the orders are generally small, we have either hand delivered them or had teachers send them home with students.

Innisbrook delivery week:

- Be available to receive shipment
- Communicate with staff and verify storage location for orders
- In the past we have asked the fifth grade teachers to let their students help us for about 20 minutes to carry boxes in from the truck.
- Organize boxes by name and/or number to make individual orders easier to find. Note any discrepancies and report to fundraising company immediately.
- Send home a note with the dates and times of order pickup (usually the day or two after delivery). Organize volunteers to staff pick up times.
- As orders are picked up, have student or parent initial that order was received.
- Distribute items from the "PTO Order" to teachers
- Orders which are not picked up must be stored in a secure place (in the past we have used Guy Egri's office); put a note in next week's Monday Memo letting families know where they can pick up their order.

Post-delivery:

- Work with PTO Treasurer to confirm that the amount billed by the fundraising companies is correct.
- Work with parents and local sales rep to resolve any problems with orders (missing items, etc.)