Fundraisers: A checklist for a successful event

Before planning and executing a fundraiser, check with your campaign leader on your agency's policy for handling fundraisers and cash. Make sure they are onboard.

1. Choose a fundraiser that makes sense for your group! If you have one in mind, great. If you are looking for a good one, check out the ideas on the Sno-King CFD website in the Training Materials section at https://www.cfd.wa.gov/cfd/sno-king

2. Plan & market your fundraiser – you can't have a party if you don't invite anyone!

3. Plan the payment options you want to have available at the event
   - Giving form
   - Cash
   - Personal check: Be sure to attach a **giving form** to employee checks to count toward your agency's participation.

4. Credit card option: email cfd@sos.wa.gov at least 2 weeks in advance. They will need following information:
   - Event name
   - Team Member:
   - Active dates (give leeway a few days before and after, we don't have the capability to request multiple activations anymore)
   - Benefitting charity
   - Fixed dollar amounts, if any

5. Manage the proceeds
   - Count any cash with a colleague and record the total on a fundraiser reconciliation form. Initial and date the record.
   - Obtain a money order/cashier's check for cash proceeds.
   - Keep any expense receipts for reimbursement. If you have any expenses, you will need to submit them with an A-19 Reimbursement Form. To learn more about the forms and process, visit of the CFD website - https://www.cfd.wa.gov/cfd/volunteerresources
   - Complete the fundraiser form. Be sure to sign and date the form. **Expenses may not be taken directly from the proceeds of the fundraiser.**
   - Mail any giving forms, employee checks, money order/cashier's check and/or receipts, along with the fundraiser form, to your campaign leader within 24 hours or per your agency's cash handling policy.