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# Fundraising Fundamentals for Physical Education, Recreation and Sport

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## ARTICLES

### Fundraising Fundamentals for Physical Education, Recreation and Sport

William Stier

This article presents a practical glimpse into the exciting and challenging world of fundraising for physical education and sport programs. Suggestions are presented that will aid the reader in selecting an appropriate fundraising project for one's own organization. Potential pitfalls that may be encountered by the teacher and coach involved in fundraising are identified and suggestions are provided as to how to avoid them. Planning is the key to fundraising and the fundraising planning process is broken down into 8 basic steps presented in the form of a template. Prospecting, as an essential element of the fundraising process, is introduced; and, suggestions are made for securing the services of Centers of Influence to aid in the fundraising effort.

The reasons why individuals feel compelled or become motivated to contribute to worthy causes are examined and suggestions are made regarding how to determine which fundraising projects or efforts might be both appropriate and successful in light of community standards and other limitations or restrictions that might exist. Finally, the ten major steps involved in organizing, planning and implementing any fundraising project or event are explained in an effort to help the would-be fundraiser convince qualified prospects to contribute to and/or buy from the soliciting organization.

Physical education, coaching and recreation specialists all face an ever-growing challenge in terms of providing quality and competitive programs for their various constituencies. This is because of the increased difficulty in supporting such programs with the funds allocated via the normal budgetary process. For a quality physical education, sport or recreation program to thrive there must be adequate resources. The lack of adequate institutional financial support means that more physical education and sport, and recreation specialists are expected, more than ever before, to generate the additional resources that are needed from outside the organization via external fundraising. Being skilled in fundraising is fast becoming a highly prized ability.

#### Understanding the Concept of Fundraising

Fundraising is a process in which *additional financial resources are secured outside of the regular budgetary operation*. These resources can be anything and everything that is of value, money, goods and services. Fundraising is not an end in itself but a means to an end. The reason one engages in fundraising

is to enhance and expand the financial base for the organization or program, not merely for the thrill or excitement associated with the fundraising process (Stier 2011).

There is a difference between *development* and *fundraising*. In development there is a long-term effort to attract additional assets. On the other hand, fundraising is used to describe specific activities within a specific time frame that are organized to generate specific financial resources. Fundraising can further be categorized into a solicitation format (asking for the donation or contribution) or a business format (selling something for a price, a donation or a contribution). In the solicitation type fundraiser the donor receives nothing tangible in exchange for the contribution while in the business format there is an exchange of a product or service for the donation.

### **The Art and Science of Fundraising**

Fundraising can be considered an art because individual creativity and ingenuity are involved in mapping out various strategies and deciding on tactics that differ depending upon whatever unique situation one finds oneself in. Fundraising is also a science due to general principles and guidelines that are applicable for all types of fundraising activities. Thus, the systematic implementation of fundamental fundraising principles and guidelines coupled with the creativity and ingenuity exhibited by individual fundraisers may make for a successful fundraising project or event.

**All fundraisers situations are somewhat different.** All fundraising projects are somewhat different depending upon the situation, environment and circumstances. Successful fundraisers should adapt fundraising ideas to suit their own situation and different needs rather than copying exactly what some other organization or group did. Fundraisers need to keep in mind that circumstances differ from organization to organization, in terms of financial and political atmosphere, as well as in terms of expectations by various constituencies.

Thus, an important element for successful fundraising is to adapt and adjust strategies and tactics to suit one's unique situation or the particular circumstances. While there is nothing inherently wrong with imitating the successful fundraising efforts of others, it is usually necessary to make adaptations, changes or alterations in planning a fundraising effort.

### **Four Categories of Fundraising**

Fundraising may be categorized into four categories, (1) individual solicitations, (2) corporate partnerships or sponsorships, (3) profit centers, and (4) special projects or events. Individual solicitation involves the asking for some type of donation. This may involve personal (face-to-face) contact, telephone solicitation or requests made through the mail or over the WWW.

In a corporate partnership or sponsorship, a business or organization provides financial support in exchange for some type of association with the group receiving the assistance. Such a partnership involves mutual, promotional, public relations and publicity benefits accruing to both entities.

The third method of generating additional income involves profit centers. These mini-businesses are stand-alone money making activities directly or indirectly associated with or related to the organization. Examples include concession stands, ticket sales, program sales, rental of facilities to outside groups, parking, vending machines and the sale of apparel and souvenirs.

The last category of fundraising involves special projects. These are fundraising efforts, projects or events that do not easily fall under any of the above three categories. These stand-alone special fundraising projects can involve almost any type of activity geared to raise much needed resources for the organization's coffers.

### **Fundraising Activities and the Factor of Time**

Fundraising projects can be thought of as one-time events, annual projects or as repeatable efforts. Some fundraisers can only be implemented one time and only one time. For example, selling small patches of artificial turf (encased in plastic) from a field that had been replaced by natural turf. An annual fundraiser is one that can easily be planned each and every year. For example, the annual golf tournament. The third type of fundraising project, in terms of time, is the repeatable project. This type of fundraiser can be implemented more than once but not necessarily every year for any number of reasons.

When planning fundraising projects there is always the possibility of piggy-backing the fundraiser with yet another activity, another fundraising effort or with another organization. One type of piggy-backing involves combining two different organizations in co-brokering or sponsoring a single fundraising project. Another example of piggy-backing is for a single organization to combine two or more different fundraising projects together at the same time. An example would be a raffle in combination with a sit-down dinner and an auction.

### **Is There a Need to Fundraise and If So—How Much?**

When considering fundraising one of the first steps one should take is to assess how much money is needed and then plan (if possible) a single fundraising project to generate that amount. Don't get caught in the trap of doing multiple fundraising projects when a single project will suffice. More is not better when it comes to scheduling fundraising projects. Keep the number of fundraising efforts to a minimum, lest, your staff, fans and the public become turned off (burned out) by the constant barrage of fundraising requests.

## **The KISS Philosophy.**

One of the keys to successful fundraising is to follow the KISS philosophy, **Keep It Simple and Short**. Some of the most effective fundraisers are also the most simplistic in design and ease of implementation.

## **Permissions, Permits and Authorizations**

Another initial step that is necessary before actually fundraising is to secure permissions from the appropriate individuals and organizations. The type of authorization depends upon the type of fundraising project being considered- For example, permission may be required from within the school, recreation or sport organization itself. This is to insure that the proposed fundraising project is appropriate and will not interfere with any other development or fundraising activity sponsored by the sport entity.

There is generally a so-called "clearinghouse" office within most non-profit organizations actively engaged in fundraising. This office typically has responsibility for approving and granting permission to engage in any fundraising effort. One would not want different groups within the organization to be competing with each other for the same discretionary cents or dollars. Nor would it be wise to have some individuals within the organization be satisfied with "picking up pennies or nickels" from various constituencies/prospects while other individuals might have been able to secure "big dollars" from these same constituencies/prospects.

There could also be any number of outside authorizations and permits to be obtained from local and governmental agencies as well as from a whole host of different licensing bureaus. In some communities there may be permits required for gambling activities, sale and consumption of alcohol, door-to-door peddling or solicitation, preparation of foods, as well as licensing agreements with organizations.

It is imperative that these permissions be secured in advance. Fundraisers who adhere to the philosophy that "forgiveness is easier to secure than permission" usually end up shooting themselves in the proverbial foot.

## **Selecting the "Right" Fundraising Project for Your Organization**

Selecting the "correct" or "appropriate" fundraising project or effort depends upon the type of organization or program one represents and the community in which one exists. Are gambling and alcohol related fundraising projects appropriate or are they taboo? Has the project under consideration been tried before? By whom? Was it successful? Will you have competition from another group in the community attempting to also fundraise? What about the political and financial environments in your community and within your own

organization? Is there a recession in the community or is the community financially healthy? Are there adequate staff (paid/volunteer) available in terms of numbers and skills? Is your organization well thought of by potential donors and supporters in the community?

### **Be Aware of Controversy and Pitfalls**

Some fundraising efforts, by their very nature, could be controversial for some groups and organizations. For example, fundraising projects involving gambling, dancing, card playing, alcohol and even some types of food hold the potential for controversy or outright taboo. To some, these activities are thought to be unacceptable or inappropriate for the community and/ or the organization itself. As a result, some activities may be banned entirely or restricted in some fashion in some communities while in others they may be accepted without hesitation.

### **Developing a Plan of Attack in Scheduling a Successful Fundraiser**

Many successful fundraisers find that the use of a template is helpful in organizing their thoughts and in structuring their fundraising planning. This template is nothing more than a list of categories or questions that, when answered, guides the organizers in structuring a well thought out, feasible, and potentially successful fundraising effort (Stier, 2000a). Such a template is provided below.

1. What is the catchy name of the proposed project?
2. How difficult is the effort on a scale of low, moderate or high complexity?
3. What is a brief description (one paragraph) of the proposed project?
4. What specific scheduling factors need to be considered?
5. What resources will be needed (and when)?
  - What facilities are needed?
  - What type of specialized equipment and supplies are required?
  - How will the event be publicized and promoted?
  - How much time is needed to plan the event, to carry out the project, and to clean up afterwards?
  - How much seed money is necessary to get the project off the ground? What is the total amount that needs to be spent on the project?
  - What personnel (paid/volunteers) are needed, both in terms of numbers and specific skills?

6. What are the risks involved in the fundraising effort? For example, the financial risks, the legal liability risks, the public relations risks?
7. What specific permits, licenses or permissions need be secured for this particular fundraising project?
8. What other specific suggestions or hints might be helpful in carrying out this proposed project to its fruition?

### **Prospecting and Identifying Centers of Influence**

Prospecting is the identification, qualification and culling of potential supporters, donors or contributors. Prospects become the prime candidates for solicitation of resources for the organization. Typically, quality prospects (potential donors) have had some type of current or past affiliation with the organization or its personnel. It is this connection or linkage with your group or program that should be exploited in the search for would-be supporters and contributors. Other individuals become prospects because they approve of your goals and objectives. And still others become viable prospects because of their support of the overall activities of the organization (Stier, 2000b; 2009).

An equally important task is to identify those who are commonly referred to as *Centers of Influence* (“*Cs of I*”). These are individuals who already support one’s organization and are willing to help further by “opening doors” to other important and influential people within the community, people who might well end up providing meaningful financial or other types of assistance to one’s program or organization (Stier, 1999; Stier, 2003).

All too frequently, people in our profession are somewhat limited in the ability to approach many important, influential and financially well off individuals in our own communities. Consequently, it a wise strategy to involve Centers of Influence to bridge the social, financial and cultural gaps that may exist between the fundraisers and potential supporters and contributors. Thus, one is able to borrow the respectability and the prestige of the Center(s) of Influence to make accessible individuals (possible donors/contributors) who otherwise might be unapproachable or unreachable.

### **Why People Contribute to Non-Profit Organizations**

If fundraisers understand why people donate or contribute, they are better able to organize and plan more effective and efficient solicitation efforts. Although people may donate and contribute for any number of reasons, five major reasons stand out (Ostlund & Brown, 1985; Hall & Mahony, 1997; Stier, 1997b; Stier, 2000c).

First, there is a perception that the group or organization is deserving of support, is doing something that is worthwhile and meaningful. Second, there is

recognition that the money generated will go to a worthy cause. Third, the item or service that is purchased/obtained (business format) is deemed worth the money in terms of its inherent value. Fourth, it is convenient for the donor (or purchaser in the business format) to deal with the representative of the soliciting (selling) organization. And, lastly, some individuals are moved to donate (solicitation format) because of the tax advantages (charitable tax deduction).

## Summary

Persons interested in fundraising need to have a plan of attack in terms of both evaluating what specific fundraising projects or efforts might be successful as well as how to actually plan a specific fundraising effort from beginning to end. The following is a summary of the major steps to consider in organizing, planning and implementing any fundraising project or event. These suggestions involve factors that should be considered by the potential fundraiser before finalizing any plans to generate outside resources (Stier, 2011).

- (1) The total amount of money needed by the organization should be determined prior to becoming involved in any fundraising effort.
- (2) A careful analysis of potential and feasible fundraising projects should be made in light of what other fundraising efforts are currently being conducted or soon will be held within the community.
- (2) Potential fundraising efforts should be assessed in light of any restrictions or limitations that may exist on behalf of the sport organization.
- (3) A realistic estimation should be made of the complexity of each fundraising project being considered and a judgment whether the project can be successfully carried off with available resources.
- (4) Determine the optimum date when the proposed fundraising project should be scheduled for maximum return on effort and resources expended.
- (5) Identify the resources, assets or tools that are essential for the success of the project.
- (6) Identify those individuals who possess specific skills and experience required for the success of the project—and get a commitment of their participation.
- (7) Determine how the fundraising event will be publicized and promoted within the community—before and after the event.
- (8) Do a risk management study on all aspects of the proposed fundraiser to determine what the risks are and whether or not they are manageable



- (9) Identify those licenses, permits, permissions and authorizations that are required for the fundraiser to take place.
- (3) Identify essential elements of the fundraising project to be critically analyzed after the conclusion of the effort in order to determine what changes are in order.

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