

USING MANAGEMENT SOFTWARE TO
**Organize Show
Choir Fundraisers**

by Paul Brown

There is every type of potential fundraiser concept out there and some that haven't even been thought of yet. The more time you spend on organizing and managing your fundraising—or cleaning up “messes” that are a natural result of a project with several moving parts—the less time your group has to devote to practicing your art and perfecting your performances.



Fundraisers Can Be Complicated

Each one comes with its own specific mix of product, pricing, delivery method and schedule, profit distribution and timing, and method of presentation (catalog, mobile applications, hand-carried samples, showroom display, website link, etc.) to your potential customers.

In other words, keeping track of what's supposed to happen versus what actually **does** happen is important—especially if your students are taking products out with them to sell, products they are responsible for either selling or turning back in.

Problems with Freeware

The old days of “yellow pad” records have mostly gone away, replaced (at least) by spreadsheet features like Excel or other freeware. This makes it easier to input changes to totals as things get turned in, and to keep a reasonably accurate history of transactions; however, the files are often kept on a personal computer (or personal Dropbox), so there can be a lack of immediate access to record data.

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There can also be a significant amount of formula programming in a spreadsheet, so you've got to find someone with the knowledge of how to do that—and if they're not the same person who is managing the fundraiser, they have to train that person on how to enter data. Some advanced financial software programs are still loaded onto just one machine, limiting access to entering changes or pulling reports.

The other aspect to a management software package to consider is this: Do you try to use various “free” internet resources (that are certainly there and available), or would a “one-stop shop” be easier, ultimately creating better organization and less hassle for your show choir and music program?

Where Cloud-Based Systems Shine

This is where cloud-based systems shine—having 24/7 access to financial / fundraiser records can greatly improve the accuracy of recordkeeping, and lessen the frustration for the person(s) responsible for managing the fundraiser.



Photo by Tracey Harrison of Clinton High Schools Attaché



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Yes, there is a certain amount of training involved with any software package, and often, the details of fundraiser prices/profit and order submission can be daunting. You should find something that clearly identifies product, money, and profit, and if order submission can be incorporated, so much the better.

Another aspect of fundraising that has changed in recent years is the distribution of profit. The term “cooperative fundraising” is used by the IRS when individuals receive credit for funds raised—and this distribution of profit can adversely affect an organization’s 501(c)(3) status, if done without regard to IRS guidelines. This topic is beyond the scope of this article, but we highly recommend that you research the topic; there are some very good white papers out there.

In a nutshell, fundraiser profits should be distributed equally among all members of an organization—not just to those who fundraise. Thus, when profits are calculated, the software should have an easy way to distribute profit equally among all students.

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Tracking Deposits and Providing Precise Reporting

Perhaps the most important task of fundraising is tracking deposits to your activity account or bank account. Do you have budget category capability, and simple but precise reporting? Yes, advanced financial software packages have this capability, but you may have to find someone who is an expert in that particular financial software to run it.

Fundraiser financials are basically straightforward—product value in vs. product value out, money in (from students) vs. money out (paying the fundraiser company), and profit credit distribution. However, there are also fundraisers where the student never touches cash or checks. Instead, purchasers can pay online or through a mobile app, placing their orders after looking through a catalog or other selection of offerings, and the payment goes straight to the fundraiser company, who then distributes the profit (and appropriate reports) to the organization when the fundraiser period finishes.

This may be the simplest method of all, but you still want a simple, 24/7 method of entering data, as well as easy financial status information access for your parents/students/members. At the end of the fundraiser, having quick and accurate access to who owes what can help you recover lost product or funds not turned in, which makes investing in the right software from the beginning a small price to pay to avoid those stresses.

ABOUT THE AUTHOR: Paul Brown is the Director of Development of Dorian Business Systems. Charms is a robust financial package as well. It will help you track fundraisers and disburse profits. Learn more about Charms by visiting www.charmsoffice.com/about.asp, where you can also create a 60-day trial account.

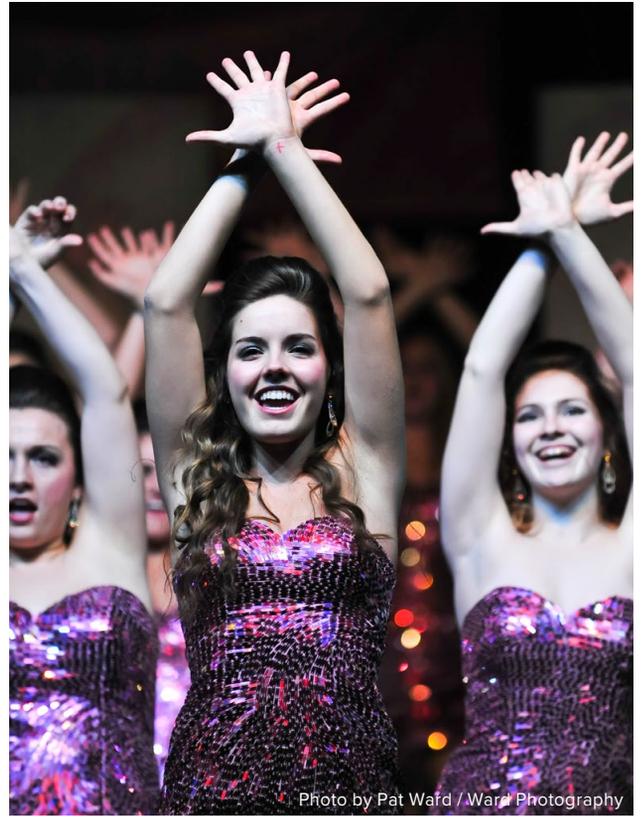


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