

# fundraising report card

*a tool for evaluating fundraising companies*

Fantastic Fundraising Company

Name

## Requirements

*Company has excellent  
product quality*

A

## Additional Comments

*and good variety*

*Company delivers  
on promises*

A

*Rep. follow-through  
is awesome*

*Company has a history of  
helping schools reach goals*

A

FINAL GRADE

A+



**Fundraising**  
**Makes It Happen**

Courtesy of the Association of  
Fund-Raising Distributors & Suppliers



**AFRDS**  
Fundraising  
Makes It Happen

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### LIST 3 CANDIDATE COMPANIES:

You need a superior fundraising company to Make It Happen. With today's wide variety of programs, products and services available in fundraising, it's difficult to determine the best company to use. This Report Card will help you compare fundraising companies and make an informed decision. *Please note: not all of the criteria may apply to your organization's specific needs.*

### RATE ON A SCALE OF 1 - 5.

*(with 1 = excellent and 5 = poor) or NA for not applicable.*

			Product quality
			Product retail prices (i.e., Do prices represent a fair value for consumers?)
			Incentive/prize program appropriateness/quality
			Caliber of company materials, brochures, promotional materials
			Professionalism of company representative*
			Educational value to students/volunteers (example: enhances presentation skills)

### PROVIDE A NUMERICAL RESPONSE TO THESE QUESTIONS.

			Number of years company has been in the fundraising business
			Number of years representative has been in the fundraising business*
			What are the projected total net profits to your organization?

## CHECK (✓) THOSE SERVICES INCLUDED IN THE COST.

Use a plus sign (+) if the service is available, but costs extra.

Use NA if the service is not applicable or available.

### Organization

			Order form tallying
			Individual orders separated per classroom
			Products pre-packaged per student
			Computerized printout itemizing student sales
			Instructions for record-keeping and other logistics
			Freight/Shipping

### Communication/Promotional Tools

			Kick-off assembly presentation and/or video
			Poster, product display
			Parent letter
			Take-home packets
			Incentive or prize program

## ANSWER WITH A (Y) FOR “YES” OR (N) FOR “NO.”

			Is the company a member of the Association of Fund-Raising Distributors & Suppliers?
			Are product samples available?
			Does the company understand and comply with your state sales tax requirements?
			Is a company representative accessible, day and night?
			Does the program stress child safety and adult supervision?

\* May not apply when evaluating mail order/catalog companies and programs.

## FUNDRAISING CHECKLIST

Other important points to consider as you meet with fundraising companies:

- What is the turnaround time for replacing incorrect or damaged shipments?
- Will out-of-stock items be back-ordered or will substitutions be made? How quickly?
- What are the terms for payment?
- What is the return policy for unsold products?

Ask for and check references.

Here are some questions to ask:

- How long has the group worked with the company?
- Did the company deliver on promises?
- Did the school or group reach its goal?
- Would the group work with the company or its representative again?

## NOTES

