

RAISING FUNDS WITH THE SHOP AND SUPPORT PROGRAM

The following is an outline of the steps involved to help your organization launch the Shop and Support Program:

1. SETTING THE STAGE TO RAISE FUNDS

- Define your program goals and objectives.
- Determine how the funds will be used within your group:
 1. **Share Funds Raised.** Whether it is membership fees, travel expenses or tuition costs or you want to provide supporters with savings, the Shop and Support Program can help reduce these expenses for families, by asking them to commit to making minimum purchases throughout the year. Your group can promote this program as mandatory or voluntary depending on the infrastructure and goal of the program. Many groups share the funds with the families (e.g. 50/50) while others offer the program as a full benefit to participating families, by providing them with 100% of the funds raised.

For example:

- A private school has a per child tuition cost of \$5,000. The school may offer families the option to contribute 50% of the profits generated by their Shop and Support Card purchases to reduce their son or daughter’s tuition.
 - A swim club traveling to various tournaments can offer the families an opportunity to reduce the travel costs and other fees by contributing 100% of the funds raised by each family to their associated fees.
2. **All Funds to Group.** 100% of the funding from the program is applied to a group’s bottom-line and dispersed evenly to fund initiatives across the group which benefits the entire supporter base.
- #### **Applications include:**
- Contribute funds to general group expenses
 - Reduce supporter fees
 - Purchasing new computers
 - Construction or playgrounds
 - Purchasing transportation
- Identify a fundraising coordinator and/or committee for your group.
 - This person or committee will be responsible for initiating group meetings, recruiting volunteers and resources, and coordinating all activities to manage the program.
 - They will oversee the ordering process and maintain your ongoing relationship with PREFERRED ONE.
 - They will promote and manage program goals and objectives to supporters and staff and also become your in-house ‘fundraising expert’ and answer any questions from your supporters about the program.

2. ENROLLING IN THE PROGRAM

- Once your organization is ready to start raising funds through the Shop and Support Program please complete the Enrolment Form and Terms Sheet, sign and fax both documents to (416) 863-5202.
- Ensure you specify the proper name, complete address and contact information for your organization along with the key contacts that will manage your fundraising campaign.
- Determine your method for fulfilling gift card orders to your supporters. Many groups combine various program options to maximize supporter participation:
 1. **Pre-Purchase Inventory** and sell ‘on site’ to supporters, taking advantage of instant buy opportunities within your group. Your group receives its funds instantly with minimal order processing required, but you will require funds to purchase inventory upfront.
 2. **Manage offline bulk orders** with supporters by distributing and collecting order forms on a regular basis along with payment. Your group also receives its funds instantly with no up front cost to you, but you will need to manage order form distribution and collection, payment processing, and placing bulk gift card orders with Preferred One. Once you receive your bulk order you must separate and distribute individual orders to supporters.
 3. **Manage the entire program online through shopandsupport.ca.** Your supporters order online, pay online, and Preferred One packages and labels each order for you, with default shipment to your group for supporter pick-up or direct to home delivery. Your group receives its net funds each month by cheque.

3. ACCOUNT SETUP

- Upon receipt of the completed forms above, your application will be reviewed and processed within 24 hours and your account will be established. Your group will also be assigned a unique 16-digit customer number. The last 10 digits will become your GROUP ID.
- You will receive an email notification confirming your group’s enrolment, which will contain additional attachments requiring your immediate attention including:

- Introductory letter templates which you can customize to introduce the Program to supporters. It is recommended that you place the letter on your stationery.
 - Family order forms which you can edit and customize with your group’s information to introduce the Shop and Support program to your supporters
 - Group Bulk Order form required for placing bulk orders
 - Online Profile which must be completed and sent back to PREFERRED ONE in order to enable online ordering through shopandsupport.ca for your supporters.
- 4. ESTABLISH THE LOGISTICS OF YOUR PROGRAM**
- Develop a strategy to announce the program and manage an ongoing ordering process.
 - Create and distribute marketing materials, posters, and order forms to communicate with supporters and allow them to place orders easily.
 - Establish financial goals and how funds raised will be used.
 - Establish bookkeeping methods to track supporter activity and funds raised.
 - Identify logistics for order drop-off and pick-up.
 - Develop incentives and promotions to drive supporter activity and participation in the program.
 - Schedule introductory and ongoing group meetings with staff and supporters to make them aware of progress and also to drive ongoing participation.
- 5. CUSTOMIZING FORMS AND LAUNCHING THE PROGRAM**
- If your group will be promoting online ordering through shopandsupport.ca, be sure to include your 10-digit Group ID on your marketing material and order forms.
 - Once you have customized your marketing materials and order forms, you may begin distributing these to your supporters to make them aware of the opportunity to support your group effortlessly through their everyday shopping, and outlining how the program works, the goals/objective of the program and the specific instructions for placing orders.
 - Determine the best method for launching the program and distributing initial order forms to all your supporters to maximize participation in the program. Be sure to specify when order forms are due back and when/where orders will be available for pickup.
 - If required, determine how to make order forms available to supporters on an ongoing basis and how you will collect them back for processing orders.
 - Order form distribution and processing can be minimized or completely avoided by promoting online ordering through shopandsupport.ca or by pre-purchasing cards to sell immediately.
- 6. ORDER PROCESSING, PAYMENT AND FULFILMENT**
- For offline bulk orders you will need to establish an order cut-off date and supporter pick-up schedule. Supporters should submit order forms to you along with their payment (cheques made payable to your group, or cash) by the order cut-off date, or place their orders directly online at shopandsupport.ca. A weekly order process is highly recommended to help fulfill orders in time for your supporters everyday shopping.
 - Once all order forms and payments have been collected from your supporters, you will need to complete and submit the Group Bulk Order form. The Bulk Order form will calculate your gross amount and net payment to PREFERRED ONE; therefore you instantly retain the difference as fundraising dollars.
 - Complete and email your Bulk Order form to PREFERRED ONE at orders@preferredone.ca
 - Forward your net payment in full directly to PREFERRED ONE. Any delays in receiving your order or payment will delay fulfillment of your order. Your group can make payments by certified cheque, draft, online banking, or pre-authorized debit. Online payments or branch to branch transfers will expedite receipt of payment and fulfillment of your orders.
 - All orders processed online through shopandsupport.ca will be individually packaged and labeled, ready for distribution to your supporters, and will be consolidated with any bulk orders placed by your cut-off date so that they arrive at your location in one shipment.
 - For online orders, supporters can pay by credit card, online banking, or pre-authorized debit. For credit card orders a 2% order processing and handling fee will be deducted from the total funds raised. Orders that do not generate a positive funding balance will not be permitted.
- 7. DISBURSEMENT OF FUNDS**
- For offline bulk orders and inventory purchases, since your group receives payment directly from supporters for the full face value of gift cards, and payments made to PREFERRED ONE are for the net total, your group already has all the funds in hand.
 - At the end of each month, your group will receive a cheque for the total funds raised by all supporters using online ordering through shopandsupport.ca.

Additional information can be viewed on www.shopandsupport.ca. If you have any questions please call 1-866-387-8073 to speak to a Program Representative who would be happy to assist you further.