



# SOLICITATION PROCEDURES

Our broader community supports Selwyn Elementary and our PTA with generous contributions of goods and services, enabling us to offer many wonderful experiences to our students. We are so grateful that we are able to depend on the support of local businesses and individuals, and we want to take good care of these relationships so that we can continue to rely upon them to supplement what the PTA and CMS are able to provide.

How do you go about obtaining goods and services on behalf of the PTA and of our students? The Board of Directors would like to provide a master list of businesses that have made donations or offered goods and services at cost to Selwyn in the past, as well as some general guidelines to help you get started.

The master list of donors will be in a continual state of flux, but it may be a good place to start, if you are trying to decide whom to solicit. There is no requirement that you use these vendors, unless specified, but it may highlight for you some friends of our school who are often eager to give, and it should prevent us from duplicating the requests of other committees or badgering the same businesses throughout the year.

The procedures below offer basic guidelines about how to solicit a donation, as well as how to follow up on your "ask" in a professional way, so that we can maintain amiable relationships with the businesses in our community. Of course, there are circumstances that may not fit these guidelines, so feel free to be creative about how and from whom you solicit goods and services. However, please keep in mind our "Selwyn PTA Fundraising Philosophy" when developing your solicitation plan.

## **Basic steps for soliciting on behalf of Selwyn:**

1. Consult master list to determine if business has already given to Selwyn this year and/or in the past, and if it is appropriate to ask again.
2. Contact the business face to face or in writing – whichever seems more appropriate and convincing. Selwyn PTA letterhead can be requested from Director of Communications, Dina Beelaert.
3. Follow up on initial ask, if necessary, with a phone call. This provides an opportunity to ask again or to confirm details (amount, timing, etc.).
4. Pick up donated goods in a timely manner.
5. Acknowledge contribution with a thank you letter and tax receipt. These may be one and the same or you may, depending on the nature of the contribution and your relationship with the vendor, send a tax receipt letter AND write a personal note.
6. Let Audit Committee Chair, Melissa Poovey, know what businesses and/or individuals you have approached and their response, so that she can maintain the master list of donors.