

Handover – Fundraising’s missing link

As the school year’s end comes into view, it’s awfully tempting to think ‘That’s a wrap for 2013. We’re done and dusted’. But are your handover notes complete?

What handover notes, you ask?

This is one of the most important – and most overlooked – aspects of fundraising. Neglecting handover notes is tantamount to reinventing the wheel (and who has the time or energy or need for that?).

In my book *The practical guide to fundraising for school and club volunteers*, I regularly draw analogies to business models. Success doesn’t just happen. It requires planning. Businesses that are successful have succession plans for key personnel. They have guides, manuals and reports to enable tasks to be carried out despite personnel changes. This is ‘corporate knowledge’.

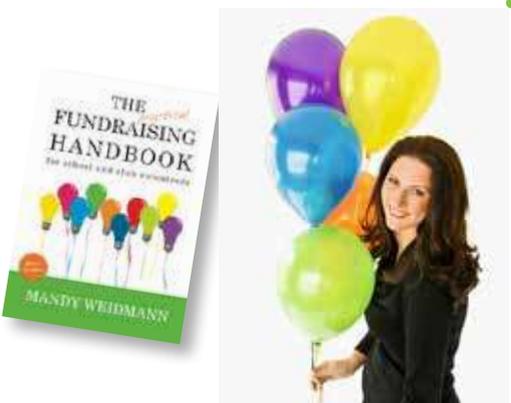
From my observations, many school fundraising committees are notorious for having bits and pieces of vital information scribbled on scraps of paper, and having different people know different aspects of an event or activity, all of which is the equivalent to ‘corporate knowledge’. But what happens if key committee members ‘graduate’ from your school at year’s end or simply don’t volunteer next year? Unfortunately we cannot insert a USB into their brains before departure and download their knowledge. That’s where handover notes come into their own!

The essentials

Handover notes are a process of documentation that will include:

- key dates
- contact details of suppliers

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- contact details of sponsors
- contact details of volunteers/ helpers
- specific tasks that need to be done
- special skills that may be needed
- profit and loss statement
- copies of newsletter content, order forms, sponsorship proposals, media releases and contacts, and a thank-you letter template
- quantities of goods purchased – and what was left over. And if there are leftover products, where are they stored?!

Adding value – saving time

The most obvious measure of success in fundraising is financial: did you meet your target?

Handover notes can shed further light by providing some retrospective analysis:

- What worked well?
- What didn’t work?
- Were the timelines realistic?
- Would you use the supplier again?
- What could be done better?
- Is this fundraiser worthy of doing again at your school or could the time and effort be

better channeled in another initiative?

Handover notes are best completed as a team while memories are fresh – meet at a coffee shop and undertake this ‘postmortem’ sociably. I recommend seeking feedback from supporters. A free online survey using a tool like surveymonkey.com makes that easy.

Ask sponsors for their impressions too. At the very least, communicate preliminary evaluation results to them.

Document successes and failures. All are learnings that the next committee will thank you for!

Safe storage

Individual fundraising initiatives need their own handover manual. For big events, I advocate that *every* stall has one too – and that they are all kept in a central secure place. With advent of web storage – and in light of recent floods that washed away so much – I also advocate keeping both hard copy and virtual (using Dropbox, Google+ or similar).

Once your handover notes are done, it really is time to take a bow and a break. You’re all set for a new year after the holidays!