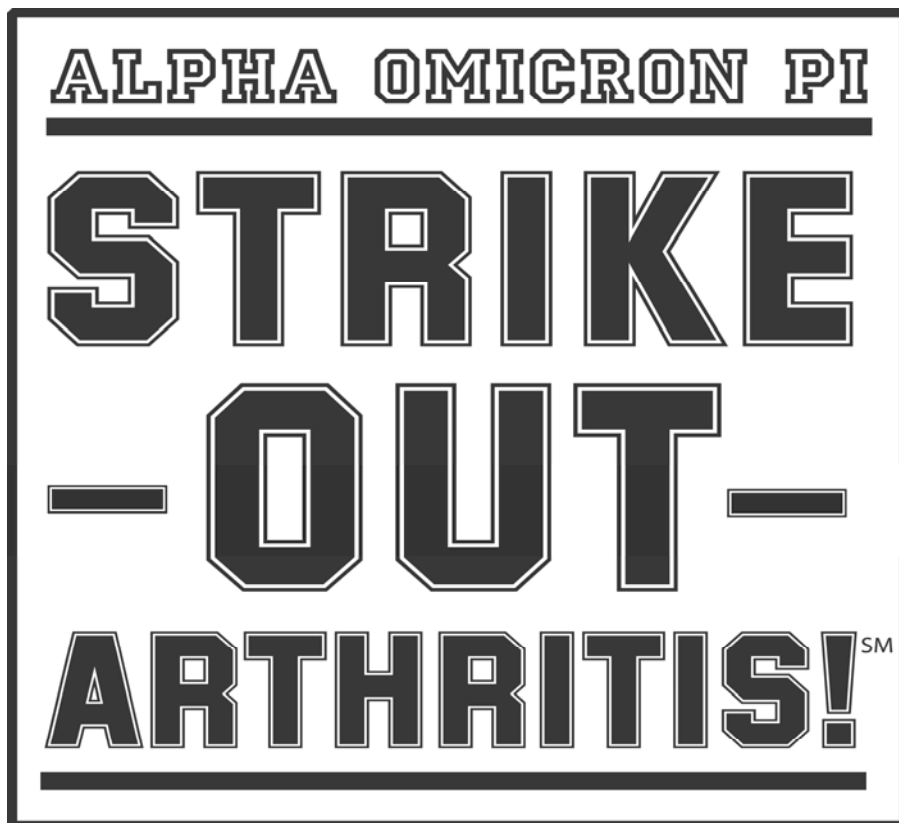


Alpha Omicron Pi Foundation



SOA! in a Box



AOII Foundation -SOA! in a Box

INTRODUCTION	PAGE 3
WHY DO AN SOA! EVENT?	PAGE 3
WHY ARTHRITIS?	PAGE 4
LOCAL ARTHRITIS FOUNDATION CHAPTERS	PAGE 4
WHAT ARE THE SECRETS TO SUCCESS?	PAGE 5
LET'S GET STARTED!	PAGE 6
NOW WHAT?	PAGE 7
CREATE A BUDGET	PAGE 7
GET ORGANIZED	PAGE 7
CREATE A TIMELINE	PAGE 8
NETWORK	PAGE 8
ARTHRITIS FOUNDATION SUPPORT	PAGE 8
IDEAS TO HELP US REACH OUR GOAL?	PAGE 8
SPONSORS	PAGE 8
AUCTIONS	PAGE 9
SALES	PAGE 10
PROMOTING THE EVENT	PAGE 10
EVALUATING YOUR SUCCESS	PAGE 11
APPENDICES	PAGE 12
APPENDIX A- SAMPLE BUDGET	PAGE 13
APPENDIX B- SAMPLE TIMELINE	PAGE 14
APPENDIX C- SAMPLE FLYER	PAGE 16
APPENDIX D- SAMPLE PRESS RELEASE	PAGE 17

Strike Out Arthritis! is the signature philanthropy event of the Alpha Omicron Pi Foundation. The event's title states with clarity our goal: **to eliminate the disease of arthritis and its debilitating effects on old and young alike.**

The AOII Foundation pursues this mission to prevent, control, and ultimately cure arthritis through fundraising for the Arthritis Foundation. Arthritis research grants and educational grants for families to attend camps and seminars that help them cope with the many challenges facing youth diagnosed with arthritis are only some of the many programs we support. Funds for these important grants come from generous collegiate and alumnae chapters and individual donors who donate to the Foundation. Since 1967, more than two million dollars has been raised by AOIIs and donated through the AOII Foundation in support of the mission to conquer arthritis once and for all!

As AOII chapters internationally sponsor **Strike Out Arthritis!** events, Alpha Omicron Pi's work on behalf of arthritis will gain recognition and appreciation in communities across the United States and Canada. These materials are designed to help AOII chapters plan **Strike Out Arthritis!** events in their communities.

Why do a Strike Out Arthritis! event?

A successful fundraising event can provide many benefits to your chapter:

- Provides instant brand recognition on your campus or community, of AOII's partnership with the arthritis cause and commitment to curing the #1 cause of disability.
- Hosting a fundraising event provides a tangible way to help others.

- Fundraising events foster a lifelong commitment to philanthropy as a core personal value.
- Your chapter will receive recognition from the Foundation during Convention and Leadership Institute.
- SOA! event management helps build professional skills.
- Fundraising events can be fun and uplifting!

Why Arthritis?

- 50 million Americans and 300,000 children have arthritis.
- Over 4 million Canadians have a form of Arthritis.
- There are more than 100 kinds of arthritis. Rheumatoid arthritis, gout, lupus and fibromyalgia are the most common.
- Arthritis is more common among women (24.9%) than men (18.1%).
- Arthritis results in 992,100 hospitalizations and 9,367 deaths each year.
- Arthritis is a more frequent cause of activity limitation than heart disease, cancer or diabetes.
- Arthritis is the nation's **number one cause of disability**.
- By 2030, an estimated 67 million Americans aged 18 years or older are projected to have a form of arthritis.

How can I get involved with my local Arthritis Foundation chapter?

Consider inviting a representative from your local Arthritis Foundation chapter to speak on arthritis at a chapter meeting. Each chapter has local patients that your chapter can support. Consider “adopting” a local child with arthritis and raise money in their honor **every** year.

Several chapters keep in touch with their honorees throughout the years, watching them grow and advance in their abilities, and perhaps even become an AOII! Visit <http://www.arthritis.org/chaptermap.php> to find your local Arthritis Foundation chapter.

What are the Secrets to Success?

Ask yourself the following questions before you begin planning an event:

- Do we have an idea that will work on our campus?
- Does it follow AOII's Policies and Procedures, including Risk Management?
- Is it realistic based on the size of our chapter?
- Can we keep costs low? Can we realistically expect to net at least 60-70% or more in revenue after expenses are paid?
- Will proceeds be high enough to make money AND have a great turn out?
- Do we have enough time to properly plan and host this event?
- When is the right time to have this event? Will it conflict with other campus, charity, or holiday events?
- What is the audience we want to target and how can we encourage them to participate?
- Is this event likely to attract media coverage?
- Will this event appeal to our members and will they have fun hosting it?
- Will this event have the approval of our AAC?

If you aren't sure of the answers, discuss your current plans and additional options with other officers, members in the chapter, or an advisor. You may also contact the AOII Foundation.

Several factors are essential to the success of a fundraising project. A fantastic idea is just the beginning. You will need to determine the feasibility of the project and its potential for success.

Your chapter may be considering several projects for an SOA! event. To assist in your evaluation and help your chapter decide what is best, remember that successful projects typically have these key factors going for them:

1. An achievable goal
2. Good financial management
3. Sufficient support and organizational resources
4. A highly organized game plan with clear-cut assignments
5. A concept that is marketable to its target audience
6. Likelihood of gaining external support
7. A signature event that isn't done by another chapter on your campus
8. A good timeline with sufficient lead time
9. Approval of Fraternity, campus and/or community advisor(s)
10. Safe and FUN!!!

Let's Get Started!

Once your chapter has made the decision to sponsor a **Strike Out Arthritis!** event, the next step is to determine the event format that would work best for your chapter and your campus. Think outside of the box when creating your event. While bowling events, softball tournaments and dodgeball games are great fundraisers, don't feel limited to what you can do! Below are some examples of unique SOA! events.

- **A Barbecue Tailgate Party**

Ask a local barbecue restaurant to donate or give you special pricing on box lunches/barbecue plates. Sell individual tickets to other Greek chapters, students, and faculty on your campus for \$2-\$3 above the price you are paying for each lunch. Invite everyone who purchases a ticket to join you for a tailgate party before Homecoming or a big game.

- **Comedy Night**

Ask local comedians to donate their time for a night of fun and laughter at your campus theatre. Pre-sell admission tickets for \$6-\$8 to other Greek chapters, students, and faculty on your campus. The day of the event, sell tickets for a slight increase (\$9-\$10) and have a concession stand where attendees can purchase donated snacks and beverages.

- **Salon Day**

Ask a local salon to donate their sales for a specific day & time period (ex: Thursday from 3-7pm). Distribute flyers on your campus and throughout the local community announcing the event. Ask your local newspaper to donate ad space to advertise the event. If the salon is a national chain, ask if the company headquarters will match the proceeds donated.

- **Basket Auction**

Gather donated items from local specialty shops, restaurants, and sporting teams, and create themed baskets. Examples of baskets include a sports basket, spa basket, restaurant basket, travel basket and jewelry basket.

- **Formal Dress Sale**

Ask everyone in your chapter to donate past formal dresses for a dress sale. You can also ask local formal shops to donate clearance dresses or last season dresses. Once you have acquired enough dresses to sale, promote your event throughout campus and the local community. Host your event prior to prom and spring formals to ensure the best outcome.

Do you already have a successful event? Some chapters have highly successful fundraising events that have achieved “tradition” status on their campus. You can use this event as your *Strike Out Arthritis!* event.

- Consider adding a tagline to the event that makes it clear that the purpose is to *Strike Out Arthritis!*
- Add a small-scale SOA! event to the chapter’s philanthropy calendar if your chapter can do more.

You’ve decided the type of event to hold. Now what?

Create a Budget. A budget will enable the chapter to “price” the event (set entry fees, determine the amount of sponsorships needed/desired, set expectations for funds raised, etc.) against expenses so your donation goal can be achieved. Your goal should be to net at least 50% and, if possible, 60-70% of the total event proceeds.

Someone comfortable with finances should spearhead the budgeting and financial management phases of the event (a potential role for the Chapter Treasurer).

First, list every possible overhead cost of the event. This includes items such as printing of promotional materials, any facility costs incurred in reserving or using the event location, any equipment required the day of the event, any upfront costs of items that will be sold, any item that will be given away at the event to participants such as t-shirts, hats or trophies, etc.

Ask the entire event committee to make a list of costs they think are essential for conducting the event, doing research when necessary to get estimates and a realistic price on the items. The total cost of anticipated direct expenses can be reduced by in-kind contributions of items or services and balanced against fees paid by participants or taken out of donated funds. Review the expense listing in an effort to pare down overhead expenses, or commit to finding in-kind contributors so that the event will be able to raise as much money as possible.

(See the sample budget in Appendix A)

Get Organized. Create the *Strike Out Arthritis!* event committee and identify key positions needed for the event. Do this up to seven months before the event so that the committee can establish a timeline and contact key participants. The number of committee members and possible assignments will be determined by your event selection.

Create a Timeline. Think long term, allowing for a minimum timeline of six months leading up to the event, plus two weeks afterward to send thank you letters, gather all of the proceeds, complete the event reporting form, and mail to the AOII Foundation (**see the sample timeline & checklist in Appendix B**). The timeline will be your guide. To succeed, plan your work and work your plan. You may use the timeline as a tool to measure your progress as the chapter prepares for the event. A separate checklist may help individual committee members understand specific tasks for which they are responsible.

Network. In order to make your fundraising event a success, you will need to communicate outside of your chapter. As you begin to plan your event, have the chapter brainstorm to build a list of those who should be targeted for participation in the event.

- If you've chosen a tournament, think in terms of who might bring a team to the tournament.
- If you need sponsors for the event, what businesses might have a real interest in being a part of it?
- If you need campus or community support, what organizations should you approach?

Once you've identified these audiences, consider which avenues will be best for reaching them.

Arthritis Foundation Support

One of your first contacts in the planning stage should be your local Arthritis Foundation office. Arthritis volunteers and family members of children with juvenile arthritis may be among those most interested in and willing to contribute to your success.

Ask what they can do to support your event. Do they have staff with marketing expertise that can help plan and promote your event? Will they promote your event in their newsletter or other mailings coinciding with the timing of your event? Do they have a relationship with other organizations, business leaders or VIPs whose support you need?

What are other ideas to help us reach our fundraising goal?

Sponsors. Securing sponsors will help you offset expenses for the event. Make an early proposal to the businesses you've targeted. When you ask them for their support, make it clear why it's in their best interest. Be specific about what's in it for them. List sponsor benefits; what you will do to give them visibility.

You may ask sponsors (in the U.S.) for cash contributions, with differing levels of contributions meriting varying levels of recognition. The donation may be for a defined amount in advance of the event, or it may be an after-the-event commitment to “match” individual contributions up to a certain amount.

You may seek sponsors who will make in-kind donations of goods or services to help reduce event costs. Examples are printing of posters/flyers, banners or other signage needed for the event, screen printing of t-shirts, donation of prizes or trophies, donation of food or rental space, donation of auction items, or a loan of equipment that will be needed to conduct your event, etc. A local beverage distributor, for example, might be offered an “exclusive” sponsorship for the donation of a soft drink concession during the event. In-kind donations can offset overhead expenses for the event, thereby increasing the amount of your contribution to the AOII Foundation in support of arthritis.

Media sponsorships can be a real boost to your event. Likely candidates are local radio or TV stations. Sponsoring stations will make a commitment to produce and air promotional spots publicizing your event, including the time and location and how to participate/contribute. They may also provide an on-air “personality” to emcee or broadcast live from the event.

As you secure a sponsor, be sure to confirm the commitment quickly in a letter that states the commitment clearly and outlines any follow up required by either party. Honor these commitments faithfully. Remember that careful handling of sponsors (giving them plenty of visibility, inviting them to be a part of the event, recognizing their contribution and thanking them in multiple ways) may encourage them to repeat the sponsorship. Remember to let your sponsors know after the event how successful it was and to ask them for their feedback on what could make it even better.

Auctions. Auctions can be successful with as few as 150-250 attendees. If you have an already established event that draws this number of participants, you may consider adding an auction as an additional fundraiser.

Silent auctions may be more manageable than other fundraising projects because bidders are able to view the donated merchandise displayed on tables and place bid at their leisure while enjoying the rest of the event. Bid sheets may be placed in front of each merchandise item or on individual sheets that can be turned in to auction hostesses and tracked on display boards. Bids may be placed only within a designated period of time, and bids of a minimum amount may be predetermined on certain items. An additional benefit to participants is that donors get a tax write-off based on the wholesale price of the goods.

Auctions require a sufficient manpower during the event. Support is needed to set up and secure the merchandise, monitor the bidding, and determine the winners. Once the bidding is closed, support is needed to collect payments and transfer the merchandise.

Sales. Additional funds may be raised on the day of the event through the sales of event merchandise, such as t-shirts, or on-site concessions donated by your organization or sponsors.

Promoting the Event

► Make a list of everyone you want to tell about your event and the avenues you can utilize to reach them. A key tactic in raising awareness of your event will be the placement of posters and/or flyers.

► Think in terms of getting your posters and flyers displayed over a two-week period twelve to six weeks prior to the event. Posters and flyers should include the name the event (**Strike Out Arthritis!**); list Alpha Omicron Pi (AOII); describe the event briefly, providing the date, location and time; and provide an invitation to participate, along with information about how to sign up and who to contact for more information. **(See the sample in Appendix C)**

► Distribution of posters/flyers should be targeted to those you want to participate in the event. This might include locations such as campus bulletin boards, mailboxes of campus organizations (including faculty and administration), large businesses in the area, popular local retailers, and local/campus gyms.

► Use e-mail and your AOII or collegiate website when possible. This will reduce some overhead costs. On all flyers, posters and advertisements, include your AOII or event website and/or e-mail contact. If you have a website, provide complete information about the upcoming event and how individuals and groups can participate.

► Send out a press release about your event one to two months prior to the event. The initial release should contain all the information on the posters and flyers, but it should also include a more detailed description of the event and how individuals/groups can sign up to participate. Also include information about why the Arthritis Foundation needs support, as well as information about your AOII chapter. **(See the sample in Appendix D)**

► Check community calendar listings in the local media (newspapers, social magazines, radio stations, TV stations, etc.), note their deadlines for submission, and put them on a schedule for contact in the weeks leading up to your event.

► Call local talk shows to request an appearance two to four weeks prior to the event. When you do the initial appearance to introduce the event and solicit participation, ask the host about appearing again closer to the event or on the day of the event to share last-minute developments.

► Take photos or video footage of the event for use in showcasing your chapter's philanthropic support. These can be used for *To Dragma*, AOII Foundation materials, the Arthritis Foundation's local and national publications, to support your chapter's application for philanthropic awards, and for use in membership recruitment on Philanthropy Day, etc.

Evaluating Your Success

Before the memories fade, complete an evaluation of your **Strike Out Arthritis!** event. Ask chapter members for their impressions - for strengths and weaknesses of the event - what went well, what could have gone better, and how it could be improved upon in coming years. Committee members should be asked to make specific recommendations, including modifications to timelines, suggestions for delegation of tasks to committee members, ideas for handling certain problems that may have been identified, etc. for improving the success of the event.

If your event had sponsors, ask them for their suggestions as well. This can be done in a simple questionnaire included in a final thank-you letter recapping the success of the event.

Thinking in advance about several success factors may actually improve your event planning. The following factors should be a part of your evaluation process:

- Did we recruit sufficient sponsors and participants to offset our expenses?
- Did we have adequate materials to use in promoting the event?
- Did we receive enough in-kind donations; are there things we could have gotten donated?
- What percentage of those invited actually participated?
- Did the participants have a good time on the day of the event, and are they likely to participate again?
- Were all bills for services paid quickly?
- Was the budget prepared in advance and approved?
- Were expense levels according to the budget?
- What were the unexpected costs?

- What were the total net proceeds raised after expenses were taken out? Were the proceeds more the 50% of what we raised?
- Was the donation check and event report form mailed as soon as possible to the AOII Foundation and clearly marked for Strike Out Arthritis!?

Appendix

The following are several pages of sample materials that may be useful to your chapter in planning and implementing its **Strike Out Arthritis!** fundraiser. They include:

- **Appendix A: Budget**
- **Appendix B: Timeline & Checklist**
- **Appendix C: Flyer**
- **Appendix D: Press Release**

AOII Foundation Support:

At any time, please feel free to contact the AOII Foundation for support and event ideas for your SOA! event.

Staff contact: *Courtney Stafford*
Email: *cstafford@alphamicronpi.org*
Phone: *615-370-0920*

Appendix A

~Sample Budget~

INCOME

450 tickets sold at \$10 each	\$ 4500
Beverage sales (450 sold at \$1 each)	\$ 450
T-shirt sales (100 sold at \$10 each)	<u>\$ 1000</u>
Estimated total income	\$5950

EXPENSES

Facilities and equipment (primarily no charge by university) However, if there is a charge, be sure to include it here.	\$ 0
Food and soft drinks (donated by sponsor) However, if there is a charge, be sure to include it here.	\$ 0
Tent, tables, chairs, etc.	\$ 450
Event promotion, forms, printing, signs, etc.	\$ 300
Food/Beverage supplies (plates, napkins, cups, utensils)	\$ 400
T-shirts, 100@\$6	<u>\$ 600</u>
Total expenses	\$1750
Potential proceeds after expenses	70% or \$4200

Estimate expenses on the high side and income on the low side. Remember, the more items that are donated, the more net income that will be available for contribution to the Foundation in support of the Arthritis Foundation.

Appendix B

~Sample Timeline & Checklist~

The following tasks should be completed in a timely manner for a successful event. One of the most important things is to allow plenty of time for preliminary planning and the assignment of tasks. This list shows the approximate time frame for each task to be accomplished. You can modify this model to fit your event or add to this checklist as you complete each task, for future use.

6-7 months ahead

- Select the type and format of the SOA! event for your chapter.
- Recruit an event chairperson.
- Recruit committee members and assign tasks.
- Develop a budget to establish entry fees and set your fundraising goal.
- Select an event date and alternate (rain) date.
- Select an event facility or location.
- Obtain permission(s) from campus, community, AAC, and insurance companies, as needed.

5-6 months ahead

- Hold committee meetings, assign all tasks, and recruit additional volunteers.
- Obtain permission to use facilities; book facilities.
- Prepare and send letters to solicit donations, sponsors, media support, etc.

4-5 months ahead

- Enlist entertainment and event host(s), as needed
- Make sure equipment such as tents, tables, and chairs will be available.
- Develop marketing materials such as entry forms, banners, press releases, t-shirt design, flyers, etc.
- Establish deadlines for ordering t-shirts, flyers, banners, etc.
- Plan for day of event add-ons such as concessions, an auction, and audience ticket sales, etc.
- Begin building a participant list.

3 months ahead

- Send out entry/participation forms to all organizations, with a due date for registration.
- Distribute flyers to local businesses, student centers, etc.
- Follow up sponsor solicitation letters with a personal visit or phone call.
- Plan for event day refreshments and concessions.

1-2 months ahead

- Reconfirm entertainment, food, equipment, supplies, etc.
- Send a reminder to teams and participants
- Compare the number of entries to your goal and continue promotion for additional participation.

- Order t-shirts, banners, tent, chairs, etc.
- Send press release(s).

Week before or week of event

- Prepare signage for the day of the event.
- Pick up equipment and supplies, refreshments, t-shirts, etc.
- Schedule clean up duties.
- Hold a final committee meeting to review last minute details.
- Arrange for petty cash to make change.
- Assign someone to take pictures during the event.

Day of event

- Place signage and posters at event.
- Set up tables, chairs, food, refreshments, SOA! banner, etc.
- Assign a greeter or hostess to meet announcers and special guests.
- Assign two (or more) members to collect tickets.
- Assign two (or more) members to maintain the concession stands.

Relax, have fun and enjoy the event!

Immediately after the event

- All funds received, whether cash or checks, should be counted by two members in each other's presence immediately after the event; and the total should be verified by both members signing a deposit ticket or written statement
- All funds should be deposited immediately.
- Take down all tables/equipment, clean up the facility, and return all equipment, supplies, etc.
- Thank all special guests for attending.

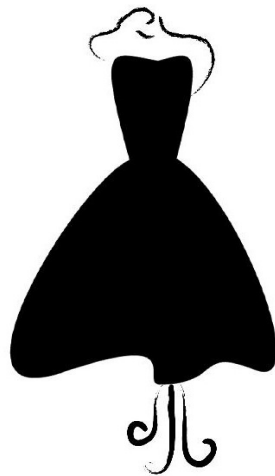
2 days after the event

- Send out thank you letters to all supporters and participants.
- Schedule and committee meeting to evaluate the event and make recommendations for the next year.
- Send any photos, SOA! event report form, and proceeds to the AOII Foundation as soon as possible.

Appendix C

~Sample Flyer~

ALPHA OMICRON PI
Formal Dress Sale



to Strike Out Arthritis!

Saturday, March 26

AOII House

126 Campus Drive

Nashville, TN 37026

10am-4pm

GET A FABULOUS DRESS AND MAKE A DIFFERENCE!

~Visit www.aoiisale.com for an exclusive look at our event! ~

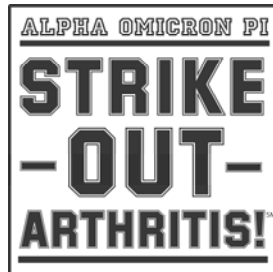
Appendix D

~Sample Press Release~

FOR IMMEDIATE RELEASE:

CONTACT:

Name
Alpha Omicron Pi, Chapter Name
Chapter Office
Phone/Email



When Striking Out Is A Good Thing

(City, State) - (Date) - "Strike Out Arthritis!" is a community-wide softball tournament occurring at (location) on (date), and it's also become a well-known tradition of Alpha Omicron Pi's (school/town) Chapter, sponsor of the tournament.

"Strike Out Arthritis! is the signature philanthropy event of Alpha Omicron Pi," says Suzie Sharp, philanthropy chair of the chapter, "and all proceeds benefit the AOII Foundation's work to eliminate arthritis as a disease and to eliminate the pain and suffering it causes old and young alike." To date, the AOII Foundation has given more than \$2 million in grants for arthritis research and education.

The (date) event will be a double-elimination softball tournament played on the fields at (location) beginning at (time). Participating teams already committed to play include (list them). Sponsors of the event include (list them). Additional teams desiring to play or sponsors wanting to support the event may obtain information at the AOII chapter's website at (give address) or by calling (give phone number).

"(Date) will be a fun-filled outing for individuals and families alike," Sharp says. In addition to the softball games, there will be (list other things going on such as vendor refreshment booths, periodic drawings, a guest from the Arthritis Foundation).

(Include quotes by sponsors and participating groups/teams as to how pleased they are to be participating in the event because they also want to help AOII Strike Out Arthritis!)

The deadline for team entry in AOII Strike Out Arthritis! is (date).

###

For more information, contact (name) at (phone number).