

Harvest Montana Fundraiser *How-to Guide*

Summer 2011



opi.mt.gov



Table of Contents

Introduction	2
Purpose and History of Project	2
Guiding Principles	3
Getting Going, Step-by-Step	3
Helpful Tips.....	6
Product Guidelines.....	9
Conclusion	11
Appendices	12
Sample Instructions to Sellers	12
Sample Press Release	12
Sample Poster.....	12
Sample Evaluation Survey.....	12
Sample Timeline.....	12
Sample Brochure.....	12
Sample Order Form.....	12
Brochure Template/Background.....	12
Order Form Template	12

Harvest Montana Fundraising Program

This document provides a comprehensive how-to guide to organizing a Harvest Montana Fundraiser in your own community. Pilot projects of this fundraising program were organized by Montana Team Nutrition and the Office of Public Instruction School Nutrition Programs. The Harvest Montana Fundraiser How-to Guide was prepared by the Office of Public Instruction, Denise Juneau, Superintendent.

Acknowledgments

Thank you to all the vendors, students, and school organizers who have participated in this fundraising program. The feedback collected from these groups was very helpful in refining and improving the program.

For more information contact:

Montana Team Nutrition Program
Montana State University
202 Romney Gym, PO Box 173370
Bozeman, MT 59717-3370
Phone (406) 994-5641
Katie Bark, RD
kbark@mt.gov
Mary Stein, MS
mstein@montana.edu
Aubree Durfey
aubreedurfey@gmail.com

Montana Office of Public Instruction
School Nutrition Programs
PO Box 202501
Helena, MT 59620-2501
Phone (406) 444-2501
Chris Emerson, MS, RD State Director
cemerson@mt.gov

This guide is available on the following Web site:

<http://opi.mt.gov/Farm2SchoolFundRaising>

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture. The contents of this publication do not necessarily reflect the view or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government. The source of funds was from 2007 and 2010 USDA Team Nutrition Training Grants awarded to the Montana Office of Public Instruction.

The Office of Public Instruction is committed to equal opportunity and non-discriminatory access to all our programs and services. For more information or to file a complain, contact OPI Title IX/EEO Coordinator at (406) 444-2673 or opipersonnel@mt.gov.

USDA is an equal opportunity provider and employer.

Developed by Montana Team Nutrition:

Aubree Durfey – Farm to School Assistant
Mary Stein, MS – Farm to School Coordinator
Katie Bark, RD, LN – Program Director

Introduction

Looking for an alternative to a tired old fundraising program? Tired of seeing kids peddle junk food to raise money through a school fundraiser? The Harvest Montana Fundraising Program may be just what you are looking for. Through this fundraising program schools or other groups raise funds through the sale of healthy, locally produced food items. This novel approach to fundraising not only raises much needed funds, but it also provides a benefit to local farmers and the community as a whole.

Purpose and History of Project

Montana Team Nutrition assists schools statewide to improve the food available throughout the school environment and in provide opportunities and resources for nutrition education. Farm to school programming is a proven strategy for connecting local food producers to the schools in their communities. The benefits of these relationships are numerous and include improved access to fresh, nutritious foods for school children, increased understanding and appreciation for agriculture among these students and their families, and improved economic viability for local food producers.

The National Farm to School Network defines Farm to School programs as: *Farm to School brings healthy food from local farms to school children nationwide. Farm to School is a comprehensive program that extends beyond farm fresh salad bars and local foods in the cafeteria to include waste management programs like composting, and experiential education opportunities such as planting school gardens, cooking demonstrations and farm tours (www.farmtoschool.org, 2011).*

Farm to school programming can effectively address both food available in the school environment and healthy eating behaviors. Research has shown improved participation in school meals as a result of Farm to School programming along with improved student knowledge relative to identifying certain foods, the source of their food and attitudes toward trying new, healthy food items.

School fundraising activities have been recognized as an important food access point in the school environment. In fact, school wellness policies often target fundraising as an important area of intervention when addressing food available at school. With Montana being a largely agricultural state, many creative and wholesome food products are produced right here. Exposing students and their families to these Montana-made healthy food items through a “Made-in-

Montana" school fundraising project serves to 1) benefit the school organizations through the raising of funds, 2) benefit the Montana food producer by gaining increased exposure for their products, and 3) improve the overall school nutrition environment.

In 2007, the Montana Team Nutrition program received funding through a Team Nutrition Training grant to conduct a pilot school fundraising activity in which healthy, Montana-made food products were sold rather than unhealthy alternatives. The initial Harvest Montana Fundraiser (previously called the Montana "From Farms to Schools" Fundraising Program) pilot project was conducted during the fall of 2008. The report for the 2008 pilot project is available online at: <http://opi.mt.gov/Farm2SchoolFundRaising>.

In 2009 and 2010, Gallatin Valley Farm to School, an affiliate of the Bozeman-based nonprofit organization, Hopa Mountain, successfully organized the Harvest Montana Fundraiser for six to seven area schools. For more information regarding Gallatin Valley Farm to School's offerings of the fundraiser, visit www.gvfarmtoschool.org.

Guiding Principles

As this fundraiser was developed by the Montana Team Nutrition program to provide a healthy fundraising alternative, we ask that if you would like to replicate this concept in your community, that you retain the focus on healthy, local or Montana food options, or products that support a healthy lifestyle or Montana agriculture. We ask that you limit less nutritious foods to less than 25 percent of the included products. This includes cookies, candies, chocolate, sweet breads and mixes, etc. Further, avoid non-food products that do not directly support Montana agriculture (jewelry, crafts, etc.).

The [product guidelines](#) below have been established to help groups smoothly navigate their way through this fundraising program **and** maintain the healthy intent of this program.

Getting Going, Step-by-Step

This guide provides any school or group with the basic resources to organize a Harvest Montana Fundraiser. The resource templates lack specificity in order to allow full customization for your group's specific needs. These resources are free of charge. For additional guidance, please read the [Helpful Tips](#) section below. Follow these nine steps to help assure the success of your fundraiser:

Step 1: Bring this fundraising idea to your school, group, or club. Get approval before proceeding with the fundraiser and determine a fundraiser chairperson (organizer) and committee members. Please note, Montana Team Nutrition will not serve as the fundraiser organizer, but rather is available to provide training and technical assistance.

Step 2: Decide upon the goals and purpose of your fundraiser.

- Determine how many people are potentially participating (selling) in the fundraiser.
- Determine fundraising goals, such as monetary target and number of participants.
- Determine the purpose of your fundraiser. What are you raising money for? Are you hoping to provide an educational component to your fundraiser?

Step 3: Set timeline (see included [sample timeline](#)).

- Create a clear timeline to share with vendors, organizers/volunteers and participants (sellers).
- Select dates that are convenient for your participants (sellers) and vendors. Keep in mind holidays, no-school days, parent-teacher conferences, etc.
- Fall (October) is a great time for this fundraiser as it coincides with holiday gift giving and special meal celebrations.
- Start planning early. Depending on the number of products and vendors, allow at least four months of planning time before your fundraiser begins.
- Try to limit your selling period to two weeks or less, as you will likely have more focused participation.

Step 4: Locate and secure commitments from vendors. Finalize product selection (see [product guidelines](#) below).

- This fundraiser is intended to be a viable market for the participating vendors, not a donation.

Step 5: Create brochures, order forms, posters, and other fundraiser materials.

- Samples are provided in this guide to give you an idea of what your materials could look like. **The background design and a blank order form are available for download, free of charge at: <http://opi.mt.gov/Farm2SchoolFundRaising>.**
- Professional quality, eye-catching materials provide program recognition and increase appeal of the fundraiser. Find someone locally to assist you in designing your materials.

Step 6: Notify and involve local media early and throughout your fundraiser. By creating a “buzz” around the fundraiser you can increase your sales. A sample press release and poster are available in the [Appendices](#).

- ❑ Send announcements (include a flyer) and reminders to local radio and television stations, newspapers, school newspapers/bulletins, listservs, community information boards, etc.
- ❑ Hang posters around your school and community before the fundraiser begins. Posters should contain pertinent information such as: name of group and fundraiser, what the money is being raised for, sell dates, and who to contact for more information.
- ❑ When your fundraiser is over, make sure to spread the story of your success! Send a follow-up press release to all of the media contacts previously contacted.

Step 7: Sell, sell, sell!

- ❑ Get your participants excited to sell by putting on a “kick-off assembly” or a special fundraiser meeting. Consider providing prizes to the highest selling individual or class, to all participants, and/or to a randomly selected participant.
- ❑ Include an “Instructions to Sellers” section or insert with the brochure and order form. This should include: what the money is being raised for, why the fundraiser is important, what are the important dates (order deadline, product delivery date), who to contact for questions. See the [Appendices](#) for a sample.

Step 8: Prepare for delivery day.

- ❑ Find a large space to receive, count, and sort the products into individual student orders. A storage unit works great as long as the products are not exposed to extreme temperatures or are perishable. Determine this location as early as possible.
- ❑ Have volunteers sign up for receiving/sorting shifts. Make sure all volunteers check in with the main organizer prior to beginning any task. Mistakes while sorting orders is time consuming and potentially expensive later.
- ❑ Be organized with order slips for vendors and payment ready upon delivery. Count all products prior to the vendor leaving the delivery area.
- ❑ Double check all orders to ensure that all participants receive a correct order.
- ❑ Determine and stick to a system for delivering the orders to participants. Each participant will deliver his/her products to their individual customers.

Step 9: Follow-up, celebrate, and reflect.

- ❑ Reflect on the goals you created in the beginning. Did you meet your sales or participation goals? How well received was the fundraiser by students, staff, parents, and vendors? What would you do differently in the future? Deliberate evaluation of your program is key in planning your future fundraising efforts. A sample survey is provided in the [appendices](#) section.
- ❑ Share your story with others throughout Montana and the nation. Consider posting an article or report at www.farmtoschool.org in addition to other news sources.
- ❑ Send thank you notes to any individual or organization that donated space or helped in any way.
- ❑ Celebrate your success!
- ❑ Ask participants, organizers, vendors, and customers for their thoughts and feedback regarding the fundraiser.

Helpful Tips

Previous participants of the Harvest Montana Fundraisers in Bozeman in 2009 and 2010 shared their experiences and best practices. Please note, there are many ways to accomplish each of the essential tasks that are covered. Consider all strategies and select those that will work best for your school or group.

Advertising: There are many options for how to advertise the fundraiser and inform children and their families of the pertinent information. Organizers from schools provided the following input:

- ❑ Set up a table with information in entryways and during events such as meetings, sporting events and open houses.
- ❑ Have volunteers holding signs and wearing costumes (in the past, fruit and vegetable costumes were used) stand at entryways to answer questions and direct families.
- ❑ Send information sheets home with students in their weekly folders two weeks prior to the start of the fundraiser and possibly send out information and reminders more than once.
- ❑ Hang posters in hallways, on doors, and other highly visible places. Write an announcement to include in your school newsletter.
- ❑ Hold a kick-off assembly to explain the logistical information and raise enthusiasm among the students.

Kick-off Assemblies: Many of the organizers recommended a kick-off assembly to get pertinent information across to participating children. Some strategies for a successful assembly include:

- Put the logistical information into skit format so it is fun and engaging for the children. Ask the audience questions at the end of the skit to be sure they understand the information.
- Show samples of what they will be selling.
- Bring in vendors (such as farmers) to help make a personal connection to the products.
- Describe and, if possible, show the prizes or incentives for participating.
- Hand out stickers or other small prizes to the children.

Order Form/Fundraising Packet Distribution: Most organizers recommended distributing the fundraising packets in the classrooms at the start of the selling time period. The packets are then taken home in the weekly folders. In each packet, include an envelope for money collection. Hand out the brochures at the start of the selling period, not days or weeks in advance, in order to reduce the chance they will get misplaced. Promptly follow up with individuals who did not hand in order forms by the deadline to ensure all orders are turned in.

For groups that are not affiliated with the schools, find a way to make sure all participating children *and their parents* receive their brochures, order forms, and other information. Synchronize the end of the selling period with a gathering or meeting to collect order forms and payment.

Tabulating Orders: The fundraising committee must develop a method for collecting, organizing, and summarizing all of the orders. Creating a spreadsheet is a good strategy. Some recommendations from previous fundraising organizers are:

- Collect and organize order forms by classroom or other grouping if necessary.
- Enter totals into the spreadsheet including the amount of money collected. During this step, make sure that all totals are correct and count all money.
- Double check that totals on the spreadsheet are correct and the amount sold matches the amount of money collected.
- Contact any children/families that have errors and determine a solution to each problem such as missing a payment, incorrect amounts, etc.
- Have at least two people check the spreadsheet numbers and count the money collected.

Separating Orders: In past fundraisers, vendors delivered products to a central location, such as a storage unit or clean and spacious garage. At this central delivery location the deliveries are inventoried and then separated into each school's/group's order. The schools/groups are then responsible for separating and distributing orders to each student. Each school/group had a slightly

different strategy, but all required three to five *diligent* volunteers for two to three hours. The basic framework each school used is outlined below:

- ❑ Upon delivery, inventory immediately while the vendor is still on site. Record any errors and work with the vendor to remedy problems. It is recommended to pay the vendors at the time of delivery.
- ❑ Be sure to have the order forms (copies or originals are acceptable) and summary product spreadsheet on hand at the delivery site. Optional: make copies of order forms so that a copy can be kept by the organizer and a copy goes home with each child.
- ❑ Group each product in a distinct area of storage site and label the area. Many organizers set up a “store” with the products lined up on tables to make it easier.
- ❑ Take each child’s order form and walk down the product line fulfilling each item on the order form. Place the order in an appropriate container such as a box or bag and mark with the child’s name. If a child has more than one box or bag, mark each container with an indicator such as “1 of 3.” It is very important to double check that each child’s order was filled correctly. This is where many mistakes occur. It is important to convey to volunteers how time consuming and difficult it can be to correct mistakes made at this point, whereas it only takes seconds to ensure an order is fulfilled properly. One organizer recommended that volunteers helping with this task avoid chatting.
- ❑ Some organizers then grouped the orders by classroom.
- ❑ At least one organizer set up the “store” and filled the orders as the children came to collect their order. This method may not allow the time necessary to double-check each order.

Distributing Orders: Each participating child needs to pick up their order and then deliver the products to each individual customer. Past organizers either delivered orders to classrooms or offered pick-up times from a central school location.

- ❑ Schedule times when children or their families can pick up the orders. Notify participants in advance of the schedule and post the information in appropriate places.
- ❑ Organize the order forms and individual orders in a way that is easy for volunteers to either deliver to classrooms or to “pull” the order form and orders when each participant comes to pick-up their order.
- ❑ If a participant’s order is very large or heavy, consider calling parents to make sure the student has adequate transportation that day. This is especially important when participating children are young or walk, bike, or ride a bus to the sponsoring school or location.
- ❑ When a child collects their order, give them a copy of the original order form so they will have the names, addresses and product order details of their sales.

- If any orders are not picked up, follow up with a phone call immediately.
- Organizers noted that it often took a significant amount of time (week to two months) for participating children or their families to notify the organizer of any errors in their order. Consider including a small information sheet stapled to the order form that encourages the children to deliver the orders immediately and direct them to the contact person if mistakes are discovered.

Celebrating Success: This is an important piece of this program, as the children and their families spend a significant amount of time and effort participating in the fundraiser. Past organizers have celebrated the end of the fundraiser by:

- Presenting prizes in classrooms.
- Sending letters home with students to announce the winners and thank everyone for their participation.
- Announcing winners over the intercom or via an in-school newscast.

Prizes and Incentives: In the past, individual schools have offered a variety of prizes to top sellers and all or randomly selected participants, including:

- | | |
|---|---|
| <input type="checkbox"/> Smoothie parties | <input type="checkbox"/> Tickets to ski resort, local sporting events, etc. |
| <input type="checkbox"/> Lunch with the Principal | <input type="checkbox"/> Gift certificates |
| <input type="checkbox"/> Extra recess time | <input type="checkbox"/> Class field trip (one was to a dairy farm) |
| <input type="checkbox"/> Locally-made cookies | <input type="checkbox"/> DVDs |
| <input type="checkbox"/> Sled | |

Product Guidelines

How to Find Local Products to Include in Your List of Products:

- Go to farmer's markets in your area or ask local food producers if they have recommendations. Search the Made in Montana database (www.madeinmontanausa.com/) or the Abundant Montana Web site (www.aeromt.org/abundant/) for local producers and products.
- Look for unique products and packaging so that the products can be given as gifts. If a food producer does not currently sell a gift basket or similar item, ask him or her if they would be interested in creating a special item for the fundraiser (encourage attractive packaging).
- Avoid products that do not ship well, are highly perishable, or have very specific storage needs. Raw and frozen meats were successfully included in one offering of the fundraiser by delivering vouchers to customers who then redeemed the voucher at the vendor's store. If

- you want to include raw or frozen meats or other highly perishable products:
- Make sure the vendor meets licensing and regulatory requirements to sell the product. Speak with your county sanitarian or health department for further assistance.
 - If using the voucher system, make sure the brochure clearly states that a voucher will be given which the customer will need to take to the store to redeem for the purchased product. Set a clear pickup timeframe.
- ❑ Use nutrient rich foods or products that promote healthy lifestyles. Limit less nutritious or occasional foods--foods *not* in the five major food groups (grains, fruits, vegetables, dairy, meat/protein) -to less than 25 percent of the products. Examples of occasional foods to limit include: jams, cookies, candies, sweet breads and mixes, etc.
 - ❑ Avoid non-food or non-agricultural items such as crafts, jewelry, etc. However, examples of acceptable non-food products include body care products or candles that include a majority of grown-in-Montana ingredients (goat's milk, emu oil, pumpkin puree, honey, beeswax) and gardening tools that are made in Montana. These products still support local farmers and ranchers and healthy lifestyles.
 - ❑ Keep local products a priority. Find products with at least half of the ingredients grown in Montana and preferably within 200 miles of your community.
 - ❑ Start with food producers who are in your immediate area, and expand outward as necessary.
 - ❑ Check with your local sanitarian (usually at your county health department) to make sure that all of the products included in your fundraiser are in compliance with regulatory requirements. Be especially cautious if including raw (or frozen) meat products or products containing dairy or eggs.
 - ❑ Communicate clearly and often with your vendors. The vendors need to have the following information:
 - Approximate number of individuals participating in your fundraiser,
 - The length of the selling period,
 - Estimated sales (numbers) for their product,
 - Time frame between when the order is placed and when the vendor delivers the product (recommended at least two weeks),
 - When and where the vendor delivers product,

- Percentage of the retail price to be received by the vendor (50-60 percent is recommended)
- **The participating vendors must be able to provide enough product to fulfill all orders in the given timeframe.**

Conclusion

Thank you for using this How-to Guide. We hope that you find it helpful in organizing your own healthy and local fundraiser! We welcome your insights and look forward to learning about your experience with the Harvest Montana Fundraiser. Feel free to send photos, stories, helpful materials, etc. The Montana Team Nutrition Program staff are also available for technical assistance upon request. For more information or to share your Harvest Montana Fundraising experience, please contact:

Montana Team Nutrition Program

Montana State University
202 Romney Gym, PO Box 173370
Bozeman, MT 59717-3370
Phone (406) 994-5640
Mary Stein
mstein@montana.edu
Aubree Durfey
aubreedurfey@gmail.com

Appendices

The resources provided below are from the 2008 pilot project as well as Gallatin Valley Farm to School's 2009 and 2010 offerings of the Harvest Montana Fundraiser in Bozeman area schools.

Sample Instructions to Sellers

Download a sample *Seller Instruction Sheet* by clicking [here](#).

Sample Press Release

Download a sample press release form by clicking [here](#).

Sample Poster

Download a sample poster by clicking [here](#).

Sample Evaluation Survey

Download a sample evaluation survey by clicking [here](#). (Note: *This electronic survey was created using the online survey tool "Survey Monkey" and e-mailed to individuals for feedback.*)

Sample Timeline

Download a sample timeline by clicking [here](#).

Sample Brochure

Download a sample brochure from Gallatin Valley Farm to School's fundraiser in 2010 by clicking [here](#).

Sample Order Form

Download a sample order form from Gallatin Valley Farm to School's fundraiser in 2010 by clicking [here](#).

The following resources are provided to assist you with not having to reinvent the process to organize a Harvest Montana fundraiser. They are in a format that can be adapted to fit your needs.

Brochure Template/Background

Download a customizable brochure background by clicking [here](#).

Order Form Template

Download a customizable brochure background by clicking [here](#).