

## 5 Steps to a Successful Charitable Giving Program

1. **List the organizations you work with.** Make sure you have contact information and a relationship to work with and know if there are any special events that you should be aware of. For example, your initial list might look something like this:

**Organization Name**

**Organization Contact Info**

**Important Dates**

*(annual donation drive, special events, deadlines etc.)*

2. **Create an annual calendar.** This will help you plan ahead and stay organized. Here's some useful information to track as you get started.

<b>Dates of Drive</b>	<b>Organization</b>	<b>Associated Event</b>	<b>Goal</b>	<b>Company matching</b>	<b>Donation Method</b>
		<i>(school field trip, annual drive, etc.)</i>	<i>(how much you hope to raise)</i>		<i>(checkout, food/supply drive, loyalty reward donations etc.)</i>

3. **Fill in your team.** You can use this template to train your staff on each charitable giving drive.

Starting *(Insert start date)* and continuing through *(insert end date)* we'll be donating to *(insert organization name)* An organization that *(insert some info about what the organization does or is working towards.)* We're supporting them by *(soliciting donations at checkout/asking for item donations such as food, clothes or supplies/asking customers to donate loyalty points, etc.)* As a business we are matching donations up to *(insert matching amount or amount you have already committed)*. By donating our customers will help this charity *(insert information about what their money will go to)*.

4. **Train employees on the process.** If you're using integrated checkout charity, or loyalty donations, check with your point-of-service provider for any short cuts or processes you can use. Otherwise, just make sure employees know how to accept and track donations.

5. **Share your success.** Thank your customers for their contributions and let them know how much you achieved as a community! This can be accomplished via in store signage, email communications, social media posts or even a note on the bottom of your receipts.