



Individual Outreach & Sales Goals



Use this worksheet to estimate the number of people you'll educate (outreach) and the number of those who will participate in your fundraiser (sales). Each team member completes this worksheet and then reports the total estimate in the gray boxes to your team leader. Individual totals are tallied on the Step 4 **Team** Outreach & Sales Goals worksheet for the team's outreach and sales goals. Only complete sections related to your team's selected approaches.

Pre Order and Selling Direct: This section provides a list of potential audiences for you to consider who you might want to target and how you might reach them. The outreach numbers will typically be larger than the sales numbers. Throughout the fundraiser, look back at the table below to see if you are meeting your personal goals.

Potential Audiences	Outreach	Sales	Potential Audiences	Outreach	Sales
Neighbors			Teachers, Coaches, School Staff		
Friends & Family's Neighbors			People in extracurricular activities		
Family			Community Center Members*		
Extended Family			Library Patrons*		
Friend's Families			Farmers Markets*		
Classmates Families			Local Businesses*		
Teammates' Families			Coffee Shop Customers*		
Teachers, Coaches, School Staff			Synagogue, Church, Mosque Members*		
Co-workers			Gym Members*		
Family's Co-workers			Gas Station Customers*		
Other:			Other:		
			Total Individual Estimate:		

* Receive permission from these establishments prior to approaching these audiences.

Selling at Events: With events, the audience is, of course, whoever attends. The list above can be used as a reference for advertising; it gives your team ideas of who to tell and where to advertise about the event.

Your team is guided through picking one or more events to attend on the Step 4 **Team** Outreach & Sales Goals worksheet, which includes documenting several details about each event and planning the shifts each team member will be working. In the table below, record the shifts you'll be working from the team sheet.

Event 1	Event 2	Event 3
Event Name:	Event Name:	Event Name:
Date(s):	Date(s):	Date(s):
Location:	Location:	Location:
Your Shift(s):	Your Shift(s):	Your Shift(s):

Event Name, Location, Date(s)	Turnout	Outreach	Sales	Priority

After considering the details and the pros and cons of each event, rank the events in the priority column in the table above based on which events the team prefers to attend. Contact the event organizers in the order your team prioritized to start scheduling events.

Once you've confirmed that your team can go to an event, transfer information from the table above and record the confirmed location, date and time of the event. Use the table below to plan out who will work each shift. Each team member can transfer their shift assignments to their own Step 4 **Individual** Outreach & Sales Goals worksheet. Suggestion: Make shifts no less than two hours long and assign at least two team members to each shift.

Event Name:			Event Name:			Event Name:		
Location:			Location:			Location:		
Date(s) & Time(s):			Date(s) & Time(s):			Date(s) & Time(s):		
Turnout	Outreach	Sales	Turnout	Outreach	Sales	Turnout	Outreach	Sales
Shifts	Team Member Names		Shifts	Team Member Names		Shifts	Team Member Names	

Summarize: Sum all of the numbers in the gray outreach and sales boxes on this worksheet into the left two boxes of table below. Multiply the fundraiser-amount per item by the team's total sales goal to get the team's total fundraiser estimate. Do the numbers in this table match the overall goals your team set at the beginning of this worksheet? If not, make adjustments to your goals and plans to get them to roughly match one another. Once everything is fine-tuned, the team's total sales is the amount the team will need to request from the utility partner for Selling Direct and Selling at Events approaches.

Team's Total Outreach Goal	Team's Total Sales Goal	Fundraiser-Amount per Item	Team's Total Fundraiser Estimate
		\$	\$