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powered by **BOOSTER** 

Planning Call

Everything you need for a productive first conversation with your Booster coach.



START PLANNING

Getting Started with Your Booster Coach

Your Booster coach will guide you through every step of your fundraiser. Before your first Planning Call, use this guide to prepare so you can make the most of your conversation.



Schedule a Planning Call

Meet with your Booster coach to discuss your goals, map out a fundraising timeline, and create a plan that works for your students, school, and community. [Schedule](#)



Sign The Merchant Account Agreement

Before your fundraiser begins, you'll complete a simple Merchant Account Agreement authorizing Booster to securely process online donations on your school's behalf. After your fundraiser concludes, Booster will send your school's proceeds, including your guaranteed cash back and any eligible DonorsChoose contributions.



Before Your Planning Call

To prepare for your Planning Call, please have the following information ready to share.

- **Fundraising Goal:** Consider how much you'd like to raise and what success looks like for your school. (Your Booster coach can help you determine a realistic goal.)
- **Your "Why":** Think about how your school plans to use the funds – new equipment, flexible seating, field trips, wellness initiatives, service projects, or whatever matters most to your students.
- **Preferred Timeline:** Have a few possible kickoff and celebration dates in mind. Your Booster coach can help determine the best schedule.
- **Class List:** Teacher names, grade levels, and approximate class size. Student names aren't needed at this stage.
- **Admin Access:** Names (first and last) and email addresses of any staff who should have administrative access to the fundraising site.

Still Have Questions?

You don't need to have everything figured out before you get started. Bring any questions or ideas to your Planning Call – your Booster coach will help you refine your fundraising plan, answer your questions, and guide you through every step of the process.

