

**Fundraising Forum**  
**July 14, 2009**

**Notes to add to Jim McIntyre's Power Point Presentation:**

**Continuity of Fundraising:**

- Look for a signature event(s) that are unique to your club, and that the community will support year after year.

**Does your club have:**

- A Mission statement that clearly and simply states your purpose? You can also use this to evaluate whether your fundraising events are fulfilling your mission, or a diversion of club resources
- A wish list of things you would like to accomplish in the current year and over a longer period of time. This list is the basis of your fundraising purposes and goals.
- What are your fundraising goals (all of them!) for this year, and over a three year period (it's hard to plan accurately beyond three years). Don't try to fundraise piece by piece. Club members are more likely to support goals when they know the whole picture. Don't "nickel and dime" your members.
- An annual focus meeting to plan fundraising events and goals with input and buy-in from club members. Don't establish goals in a vacuum.
- A "community" assessment of needs, and how they match your club priorities. Are you building park benches, when your community needs handicapped ramps?

**Is your fundraising connected with a service project?**

- Do your donors clearly understand the purpose and benefit of their donations?
- Can they participate in the service project, as well as contributing toward it?
- Can they see, touch, experience the direct benefit of their support?
- If they cannot be on site, do you provide photos, personal testimony, thank you letters, impact information? Can they accompany club members on site visits?
- Do your donors feel they have an opportunity to contribute ideas as well as financial support?

**Put a detail person in charge of a fundraising event or campaign.**

- Ask them to create a check list and event calendar for future leaders to follow
- Provide support, but don't micro-manage
- Have mutually agreed upon check in dates. Trust but verify.
- Insist on appropriate documentation and accountability, particularly in regard to the collection of funds and payment of vendors.
- Consider the use of event planning software
- Communicate projects opportunities/tasks clearly and provide sign-up sheets for all events at the top of the year. If you have to go back to the club each time you plan an event, the feeling of overwhelm increases.

**Calendar your fundraising events before the year begins.**

- Check on other community events and fundraisers
- Post your dates on the District6360.com calendar, your community events calendar, the District and your club newsletter.

- Arrange rain/snow dates.
- Give each of your club members an annual calendar with club dates, RI dates and event dates included (especially fundraising or project activities outside of club meetings days).

**Partner with other Rotary clubs, Non-Profits, Service Clubs.**

- Share the work load, the planning, the fun – and the net.
- Expand the potential audience, sponsorships, workers when you expand your area of influence
- Have fun with competitions between partners for who can bring in the most in sponsorships, donations, workers, PR opportunities.

**Visibility:**

- Pre-promote sponsorships. Create clear sponsorship benefits and create consistent sponsorship packets. Follow through on promises to the letter.
- Create signage that promotes the sponsors, and your Rotary club
- Make sure club members are wearing their Rotary pins, and consider club tee shirts, vests or hats to communicate the work of your club in the community
- Take lots of digital photos
- Find out how your local media likes to receive public service announcements, or feature article information. Follow their instructions to the letter. Hand deliver Press Releases and PSA's. Include interesting photos (not grip and grin photos of people receiving checks) of people doing things, kids have fun, dramatic moments from an event or the impact of your good works.
- Don't forget radio and TV.
- Try to get a celebrity (national or local) to attend, speak or lend their name as an honorary chair of your event.
- Use all the media opportunities at your disposal including: Club and District 6360 web sites, newsletters, mailings. Community Calendars: Chamber, Newspaper, Magazine, Arts Council, Churches

**Accountability:**

- Clear chain of control of all funds coming in and all vendor payments going out.
- Copy checks, keep receipts, count cash in the presence of two people, deposit all funds promptly and into the appropriate account (don't run funds through your personal account).
- Create a detailed, conservative budget. Keep it updated as the project evolves.
- Get all required approvals: project budget, licensing (liquor, food, parade, etc.).
- Consider event insurance. Check liability insurance and bonding requirements for people handling funds.
- Reporting requirements: Final budget update, project check list, job descriptions of key people with time involvement included, thank you letters to sponsors and donors. Give final report to the community.
- Know the state and federal laws regarding what is a charitable contribution. Don't mislead the donors.

**Celebrate success and have Fun along the way!!**

**Remember the purpose of the fundraising campaign or event . . .people give to people.**