

## Fundraising Workshop

Elective Class: Thursday, March 15, 2018

2:00-3:30pm

This interactive session is facilitated by  
District 7710 PDG Matthew Kane.  
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### Today's Workshop Goal:

- Identify 5 Fundraising Ideas to present to your club
- Learn the names of 5 contacts in this room who can help you fundraise
- Discover 5 Tips for Fundraising Success through Selling, Promotion, or working with Volunteers

### Agenda:

1. Why fundraising is important
2. 10 Steps to Running an Effective Fundraiser
3. Break into Discussion Groups. Explore 3 questions:  
What has been our club's best fundraiser?  
What has been our club's worst fundraiser?  
What fundraiser is your club now considering?
4. In large group, review Best Ideas from Discussion Groups
5. Break into Discussion Groups. Explore 3 questions:  
What selling techniques has your club had success with?  
What promotional techniques has your club had success with?  
How has your club organized volunteers successfully?
6. In Large Group, review Best Ideas from Discussion Groups
7. Summary. Questions & Answers
8. Workshop Evaluation Sheet

## TEN STEPS to Running an Effective Fundraiser

The following steps outline the typical process for creating a fundraising plan, including questions for consideration:

1. Determine fundraising needs
  - What's the purpose of the possible fundraising activity?
  - What is a realistic fundraising goal?
  - What type of event will meet the club's funding needs?
2. Brainstorm ideas / Resources
  - Facebook's Rotary Fundraising Ideas Page  
[www.facebook.com/RotaryFundraisingIdeas](http://www.facebook.com/RotaryFundraisingIdeas)
  - Examples:
    - Fly the Flag fundraiser-pay \$50/yr and Rotarians will setup flag for four summer holidays
    - Garden Party – held at a local nursery
    - In-door Putt Putt Golf tournament. Setup in a large retail store, each hole has separate sponsor and decorated with enthusiasm

### Rotary Showcase

[www.Rotary.org/showcase](http://www.Rotary.org/showcase) Search keyword: Fundraiser

Drinks for Do-Gooders

Butterfly Storybook. Publish stories written by young kids

Purple Pinkie Project

3. Establish a budget
  - What funding is available in the club budget?
  - What expenses are required to conduct the fundraiser?
  - What are the anticipated revenues?
4. Determine the logistics of the fundraiser
  - When and where will we hold the event?
  - Do we need to make any reservations or arrangements beforehand?
  - What's our timetable for each step involved?
  - Are we in compliance with local and national laws?

## TEN STEPS to Running an Effective Fundraiser

5. Organize volunteers
    - How many people will we need to plan and carry out the fundraiser?
    - What roles and tasks will volunteers have?
    - How will we involve community members?
    - How will we involve friends, family, and business associates?
    - Do we have any donated goods or services?
  
  6. Publicize the event
    - What promotional strategies will we use? Will you build a website or a Facebook page?
    - What's the most effective way to publicize the event?
    - Who are the target audiences in both the club and in the community?
    - How can we promote the event to local media?
  
  7. Implement the fundraiser
    - Who will monitor the activity (both successes and failures) while it is being carried out?
  
  8. Manage funds in a businesslike manner.
    - What procedure will we use to track use of funds, both for contributions and expenditures?
    - How will we be transparent and report the disposition of funds raised?
  
  9. Recognize volunteers and contributors for their roles.
  
  10. Review and evaluate the effort with the fundraising organizing committee, club president, and other club leaders.
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- ✓ To ensure continuity for future fundraising efforts, be sure to turn over lists of vendors, electronic files, budgets and volunteers.
  - ✓ What lessons were learned that can be applied to future fundraisers?
  - ✓ Which ideas and experiences could we share with other clubs and Rotary International?