

## **Educational Session Notes**

### **Successful Fundraising**

**Training Leader—Cindy Piva**

**8:00 AM**

**9:45 AM**

**Training Leader—Rod Thomson**

**9:45 AM**

#### **What is fundraising?**

- Club participation
- Club fellowship
- Public image
- Fundraising for a specific cause
- Purpose
- Fun
- Engaging the community
- Engaging the club members
- Membership attraction

#### **What is the role of the president?**

- Communicate the “why”
- Establish the “ buy-in” to the membership
- Inspire
- Pursue additional ideas
- Research
- Remove road blocks
- Planning and logistics
- Defining financial goals
- Good stewardship
- Establish the committees
- Exhibit leadership
- Broadly engage club members
- Broadly engage other clubs

#### **What are the challenges to fundraising?**

- burnout

- club size
- revenue source
- timing of the event
- lack of club member engagement
- repetition of the event each year
- weather
- partnership agreements
- competition by outside organizations
- new ideas
- return on time and investment
- when to say goodbye to an event
- the economy

### **What are the way to ensure a successful event?**

- silent/live auctions
- bundle many small events into a larger consolidated event
- choosing the right time of day or day of the week
- engaging a capable team
- employing a multiple club activity
- club needs a passionate driver( club champion)
- engage Rotaract club members

### **What went wrong with the fundraiser?**

- External communication failure
- Lost focus of the need
- Message clarification
- Poor choice or lose of venue
- No plan "B" for sponsors
- Internal and external marketing failures
- Lack of cohesion
- Volunteer bailout
- Resistance to change

### **Actions to Improve Fundraising**

- Planning and delegation
- Follow-up on plans
- Communication – message clarification
- Two way communication to external partners
- Internal research
- Acknowledge hard works and mileposts along the way
- Feedback at the end of the event
- Personal direct acknowledgements
- Regular updates

- Maximum club participation
- Clear vision of individual deliverable roles and job descriptions
- Rotaract involvement

**Why was the event enjoyable?**

- Engaged the community – AED placements
- Booth at Saturday community market – everyone participated in some manner
- Palm Sunday brunch- no organizations , just show up and work
- Private auction by invite only to community oriented people
- “Hoop”athon that was inclusive for Rotarians, friends and community
- Auction where problem occurred but someone stepped up to replace a worker

**R.O.T.A.R.Y.**

- R** - Time, members, target audience, facilities, partners, cause
- O** - Establish committees, identify a leader, communication plan, define everyone’s role, identify people, timetable
- T** - Press releases, social media, members, clarify messages
- A** - Rotaract/ engage partners, timetable follow up, engage people, keep track of progress, celebrate goals, follow-up and support, encouragement
- R** - Meeting objectives, re-assign tasks when needed, share information with next year’s team, final report
- Y** - Celebrate, party, thank everyone possibly with hand written notes, PR