

**FUNDRAISING THAT WORKS**  
**SESSION INSTRUCTOR: CAROLYN JONES**  
**SESSION NOTES FRIDAY 8:30 AM**

**Commonalities of Successful Fundraising Events**

- They provide value for the effort expended
- They provide return (make \$\$\$)
- Continuity year-to-year
- Clearly identified tasks
- Good succession planning
- Engages the community
- Contributes to Rotary profile in the community
- Makes people happy - is FUN
- 100% participation of members
- Good involvement of the community

**Case Study E**

- have a strong routine/machine in place
- need co-Chairs
- overlap co-chair rotation (2 year terms – with 1 in second year of rotation and another in 1<sup>st</sup> year – to provide mentoring and continuity)
- have PE or another Director as overseer/mentor of the fundraiser
- regular committee meetings
- minutes of meetings with record of timelines and key dates
- maintain event notebook/manual
- member only access part of Club website to archive minutes/notes/manuals so that information is not lost in the hand-offs year-to-year
- utilize the Junior Chamber of Commerce “Basic Form” (attached)

**Case Study D**

- limit free drinks – allocate only 2 drink tickets per attendee and then make it a cash bar (also will help to reduce host liquor liability)
- Is it really an issue??? (important question to ask)
- compromise to ensure it works better for everyone
- get a professional Auctioneer
- have spotters act as Sergeant-at-Arms to deal with unruly attendees
- warn audience about the “Rules”
- place the bar in a different area – review the venue

**Case Study C**

- make sure all fundraisers have co-Chairs
- have Chair succession planning (2 years)
- get a former Chair to stand in
- hire a professional event planner

- ensure sub-committee Chairs are engaged and on task
- don't lose sight of contacts and work done to-date

### **Why continue with a Fundraiser?**

- continuity
- profitable – makes good money
- commitment is proven – and exists
- branding
- laziness (to change!!!)
- comfort with the “known”
- community expectations
- efficiency/economics
- community involvement

### **Why Change?**

- ask the question “why are we raising the money?”
- if not hugely financially successful – ask is it a ‘friend-raiser’ or a ‘fund-raiser’
- look at retooling an existing event
- socially acceptable norms change (i.e.: men’s only night)
- new need for more funds
- diversity in fundraising – just in case you loose a former ‘hit’
- demographics of members (workers & interests) change

**FUNDRAISING THAT WORKS  
SESSION INSTRUCTOR: CAROLYN JONES  
SESSION NOTES FRIDAY 4:15 PM**

### **Commonalities of Successful Fundraising Events**

- Tied in with a bigger Club or community event
- It is the only game in town
- Community inclusive
- Community values the event
- Community benefits from the event
- Strong partnerships/people/resources

### **Case Study B**

- Timing – tiring out members (exhaustion)

### **Case Study E**

- Remind everyone that great things can be accomplished in a very short period of time
- Have a meeting with the Board
- Bring in a mentor/former Chair

- Make sure reports happen to the Board
- Make sure Director is aware of their responsibilities to stay on top of work done by committees

### **Case Study A**

- Always have a co-Chair
- Event binder/manuals
- Don't allow fiefdoms
- 

### **Why continue with a Fundraiser?**

- Still successful/makes \$\$\$
- Expectations of participants
- Educated/can operate on cruise control
- Branded
- Fun and fellowship
- A manual exists
- Why change?

### **Why Change?**

- Resources no longer available
- Don't wear out a good thing
- Negative image in the community
- Saturation
- Social norms change
- Event becomes controversial

**FUNDRAISING THAT WORKS  
SESSION INSTRUCTOR: DOREEN FOX KELSEY  
SESSION NOTES FRIDAY 8:30 AM**

**CONCERNS**

Why are you here?

“Retained Earnings” spent  
Big time fatigue, laziness to tackle large projects  
Small clubs – fundraising capacity  
Big dreams, minimal success  
Small community, competition,  
Need new ideas  
Small work + big money?  
Ticket selling fatigue / guilt  
Just for the ‘halibut’ creative ideas

## **PURPOSES / REASONS FOR FUNDRAISING**

Club participation / fellowship  
Raise funds for community  
Increase Rotary awareness

## **OTHER CHALLENGES**

Older members – succession  
Burnout – annual, no breaks  
Everyone looking for money + need is greater  
Local versus international emphasis  
Meeting success  
Keeping it fresh

## **BEST EVENTS?**

### Group 1

Annual duck derby:

At \$10 / duck x 10,000 ducks

Partner with other groups – Kiwanis, Lions, for sales

3,700 ducks = \$37,000

Common characteristic – in the public eye, include all members

### Group 2

In community - fun

Dance: 50s – 60s sock hop: admission; concession

Beer garden

Haunted house            100,000

### Group 3

Bowl-a-rama: half day \$10,000+

Pair of Hearts ball – donations, live auction

Hop-toberfest – with microbreweries – scholarships funded

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

Research:

Liability inc. liquor

Other clubs            Done it

Scheduling            Check conflicts

Economics

Scale vs. resources

Partnering options

Tied to efforts

**Organize:**

- Committee
- Promotions
- Licensing

**Tell:**

- Publicity
- Timing
- Media: Radio, TV, Print, etc.
- Social Media: (free / economical), Facebook, etc.

**Actions:**

- Coordinate volunteers
- Check follow-up
- Clean up after (making it fun)

**Review:**

- Reference booklet tracking succession
- Post Mortem evaluation: Success, PR
- Fellowship, potluck

**You are set to go:**

- Thank you's
- PR
- Video follow
- Invite guests to lunch

**CASE STUDY (B)**

What worked/could have worked?

- Effort – reward relationship
- Easy in / easy out – not onerous or fatiguing
- Community involvement

What went wrong/could go wrong?

- Pub - connections to
- Limited capacity (size?) / returns
- Pub - over serving

What actions need to be taken/could have been taken?

- Check suitability for club (scale) / expectations

**CASE STUDY (E)**

What worked/could have worked?

What went wrong/could go wrong?

Changing / continuity of chairs – no sharing of info, no advance timelines  
Leadership / monitoring – unsuccessful / lacking

What actions need to be taken/could have been taken?  
Check suitability for club (scale) / expectations

### **CASE STUDY (F)**

What worked/could have worked?

What went wrong/could go wrong?

Lack of member buy-in – involvement / excitement

Lack of partnerships with others, e.g. ticket sales / Paul Harris recognition?

What actions need to be taken/could have been taken?

Check suitability for club (scale) / expectations

## **FUNDRAISING THAT WORKS SESSION INSTRUCTOR: DOREEN FOX KELSEY SESSION NOTES SATURDAY 3:20 PM**

### **CONCERNS**

Why are you here?

Fundraising is important

New ideas

Expand types of fundraisers

Need to learn / fundraise

Successful fundraising:

Congruent with club values / priorities

Exceed \$ goal

Got experience

'Wages' \$.50/hr & effort / rewards relationship

FUNDraising – people want to participate

### **PURPOSES / REASONS FOR FUNDRAISING**

Fellowship – engaging members

Awareness for a CAUSE - polio; your CLUB ....; ROTARY....

Benefits:

- Rotary in action
- See us in the community
- Profile
- Community resources
- Family involvement – participation
- Potential new members'

**OTHER CHALLENGES**

- Lost fundraiser due to N.Z. snail migration
- Same old – same people, same events
- Reach too far for available Club resources
- Conflicts
  - Other organizations
  - Same / similar event
  - Date conflicts
- Competition with other clubs
- Economy – ups & downs

**BEST EVENTS?**

Group 1

- No soliciting
- Iron Chef
- Dinner event
- Beverages
- “Quick buyers” – quick nibbles
- BBQ outside etc.

Group 2

- Chocolate bar / bunny picture naming at Easter
- Sustainable / organic
- Buy compost in bulk (waste from wastewater treatment plant) everyone in community contributed!
  - Repackage in small bags and sell
  - Hands on project – Rotarians bagged etc.
  - Line-ups – bagging & selling same day – next time bag 2 advance days
  - Donated trucking – low cost to obtain

Group 3

- Sports memorabilia sale
- Member – Mariners connection (lost member with connection)
- Relationships with others in community

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

### Research:

- Ideas – comparison shop  
(buy supplies but get best deal)
- Check for support

### Organize:

- Establish budget
- Form committees

### Tell:

- Get the word out
- Traditional press release - newspaper
- Social media – Facebook, Twitter,
- Invite: non-Rotarians; friends; other clubs

### Actions:

- Assign tasks
- Oversight
- Ongoing planning / logistics
- Invite: non-Rotarians; friends; other clubs

### Review:

- Timeline
- Agenda
- Check on volunteers
- Check list / timelines

### You are set to go

- Celebrate
- Recognize
- Thank contributors
- PR Thanks

## **CASE STUDY (B)**

### What worked/could have worked?

- Made some money

### What went wrong/could go wrong?

- Fell short – burn out

### What actions need to be taken/could have been taken?

- Better planning
- Not overburden members
- “No ROI”

## **CASE STUDY (E)**

### What worked/could have worked?

- Venue
- Function
- History – well established event

What when wrong/could go wrong?

No continuity – succession plan not there

No back-up plan

Lack of communication

Co-chairs not working together

Members disengaged / not informed / relying too much on co-chairs

What actions need to be taken/could have been taken?

Improve communications

Consult past organizers

Ensure co-chairs are well informed and there's an accountability system in place

### **CASE STUDY (F)**

What worked/could have worked?

Longevity of event – don't re-invent

Meeting goal

What went wrong/could go wrong?

Burned out volunteers

What actions need to be taken/could have been taken?

Contribute to capacity

Redistribute work load; match interest to volunteer activities

### **NEW METHODS**

When do we start replacing traditional events?

Attendance drops off

Interest drops off

Don't wait until it does

Once you have a new good event

When you have too many events

Not FUN anymore

Can't get volunteers

Can't fund the project anymore – cash flow issues.

**FUNDRAISING THAT WORKS**  
**SESSION INSTRUCTOR: SHARON EDBERG**  
**SESSION NOTES FRIDAY 8:30 AM**

**WHAT ARE THE CHALLENGES? /WHY ARE YOU HERE?**

Participation - by the whole club  
Level of commitment - burn out  
Economy  
Social Issues - gambling, alcohol at events  
Members tired of being asked for money - focus for \$ is inward not outward  
Looking for new options

**NEW IDEAS**

Consider types of rewards  
    Diamond - prize  
    Musician - experience  
    Speaker - emotion  
Nite of Magic  
    Carnival atmosphere, circus,  
    jugglers  
    food  
    bar  
    games  
    live music & dancing  
Ice Classic  
    mid-October Raffle, depending on where you live  
    select the day, hour, minute of the ice breaking  
    cash prizes and Rotary awareness information on ticket stub  
Ladies/Mens Night Out  
Duck Race  
Rose Sale - valentines, Mother's Day, etc.  
Cow Bingo  
Walk, form teams to benefit youth  
Garage Sale, specific types of items (sports) or lots of variety  
Raffle art, car, 10 minutes to fill grocery cart, vacation, etc

**WHEN IT IS TIME TO PHASE OUT YOUR FUND RAISING EVENT OR TRY SOMETHING NEW?**

Member burn out  
Too labor intensive

Lack of member involvement  
Cultural changes  
Age differences  
Consider pride/ownership of the project  
Funds raised? Value for \$?

### **OTHER IDEAS**

Review why you are raising funds  
**Tactfully** move to the new event by club reviews, old vs. new  
Board review events annually  
Have a club visioning session  
Transition of leadership is a good time to evaluate/change  
Be sure the event has a co-chair

## **FUNDRAISING THAT WORKS SESSION INSTRUCTOR: SHARON EDBERG SESSION NOTES FRIDAY 4:15 PM**

### **WHY ARE YOU HERE? /WHAT ARE THE CHALLENGES?**

Find out what others are doing  
Learn new options, event is stale and needs freshness  
Fundraising problems, demographics, changing families  
Need involvement of younger members snappy new ideas  
How to get people to events  
Members are burning out  
Poor economy  
Competition  
Gaming funds may go away, need something new

### **NEW IDEAS**

Fantasy Travel Event to destinations such as Africa, Asia, Australia, and Caribbean  
Travel agent involved, early bird drawing, costs \$ up front to do this event  
Collaboration with 4-H kids, they raise animals that are butchered and community members bid to eat first at a dinner event. Funds go to youth program, buy backpacks

Cycling event with winery destinations. No drinking of wine, only water of such during the ride so families can participate. At end of ride, tasting happens. Cost is \$65.00 Tom McVey can share more information

Brewfest in Park (any unique property can work) \$25.00 for all you can drink.

Hole in one contest part of the event as well as toys for kids

Car Show

Murder Mystery evening

Sell Keys to a treasure chest

Rides on a dog sled (works well in Alaska)

Ducks sold for \$5 - \$10 each to race in creek or such

Drop ducks in a lake and send a retriever to get them, first duck chosen gets 1st prize

Casio night

Hire a professional entertainer and sell tickets

Every member donate a bottle of wine, auction them

Crab Feed - done in winter when nothing else is happening

Wine and Chocolate tasting

Raffle

Decorate, sell, or pick up Christmas trees

Ice Fishing for fun

## **WHEN IS IT TIME TO PHASE OUT YOUR FUNDRAISING EVENT OR TRY SOMETHING NEW?**

When leadership changes

Diminishing returns

Burn Out

No longer fun

New/better idea is identified

Always the same people - no one else is involved

## **OTHER IDEAS**

Review why you are raising funds

Start phasing in a new project before ending the old one if possible

Poll members to get their feedback

Club visioning can help to plan forward

**FUNDRAISING THAT WORKS**  
**SESSION INSTRUCTOR: SHARON EDBERG**  
**SESSION NOTES SATURDAY 3:20 PM**

**WHY ARE YOU HERE? /WHAT ARE THE CHALLENGES?**

Obligated to raise money  
Need new ideas  
Losing our bingo funds  
Bank new ideas for the future  
Transition our fundraising  
Alternative to labor intensive auction  
Small club - member burn-out  
9 clubs in community looking at the 'same pot'  
Spend money to make money  
20% do work 80% do not  
Lack of leadership

**NEW IDEAS**

Send \$50 to clubs around the world to cover cost of a gift we ask them to send back to us for an auction - get very unique gifts, often work much more than \$50  
Duck Hunt raffle, big ticket items for winners  
Lobster dinner - whole community looks forward to coming  
Ghost dinner (a non event) where no one actually comes but we sell tickets, promote time we're saving, cost of new outfit, etc. (Costs you won't have)  
Community Breakfast brings in guests who are potential members and raises money  
Buffalo BBQ  
Scotch Tasting  
Hot Dog Sale - in center of town, great for the kids - display Rotary posters  
Wine donation - sell tickets  
Food festival  
Built a house and donated it  
Flags over Bellaire - check web site, 4 times a year, flag is delivered to your home, removed after holiday ends.  
Flamingo someone's lawn with plastic flamingos - pay to do it and pay to have them taken away (always anonymous)  
Shopping spree-fill cart at grocery store  
Balderdash - golf ball roll off  
Dessert Auction  
Golf  
Cow plops  
Date with bachelor

## **WHEN IS IT TIME TO PHASE OUT YOUR FUNDRAISING EVENT OR TRY SOMETHING NEW?**

When club has changed  
When members are burned out

### **OTHER IDEAS**

Review why you are raising money  
Have a strong cause (kids) to raise money for  
Have a District Visioning session  
Have a Fireside to talk about what you are raising money for, critique the event  
Hold a planning session to evaluate

## **FUNDRAISING THAT WORKS SESSION INSTRUCTOR: KATHERINE THOMPSON SESSION NOTES**

What are some of the best fund-raising events you have ever attended, either inside or outside of Rotary?

A Crab Feed with an Interact Club.  
A "Taste of" event showcasing local restaurants.  
Duck Floats  
Jazz Festivals.  
Waterfront Festivals.  
Christmas Tree Display combined with a Gala Auction.  
Rose Sales at Thanksgiving, Valentines or Mother's Day.  
Crab Races  
Auctions (wine, holiday, etc).  
TV Auctions.  
Antique Car Shows  
Craigslist Sales  
Rummage Sales

What are the common elements to these fund-raisers?

Alcohol consumption (especially at auction events).  
Showcase local volunteers, present awards to them.  
Community involvement.  
Total Club Involvement.  
Involve Interact (or Rotaract) Clubs  
Fun/Fellowship.

Build local community identity.  
Rotary Club seen as a positive force in the community.  
Raise profile of Rotary Club in the community, attract potential new members.

What are the key elements to successful fund-raising events?

Bring in sponsors to underwrite operating costs.  
Perform a cost-benefit analysis to determine whether appropriate monetary returns are being realized based on total volunteer hours needed.  
Get the entire Club involved.  
Perform appropriate public relations to get the word out.  
Find ways to promote Rotary at each event, attract new members to the Club.  
Be on guard against “fund raising fatigue”. Check for appropriate spacing between events.  
Be sure to start with the “why”; what group will benefit from your fund-raiser?

How to plan your event?

R (Research):

Involve other community groups/beneficiaries.  
Research menu issues, health codes and ordinances if food is being served.  
Cost and venue issues.  
Goals/time frames.  
Perform feasibility studies if necessary.  
Develop and maintain social networking sites.  
Check with participants...are they willing to be involved?

O (Outreach):

Community.  
Volunteers  
PSA's (Public Service Announcements).

T (Tell):

Newspaper/radio/Internet.  
Involve local celebrities if possible.  
Affiliated Groups.  
Club Membership.  
“Cross-Pollinate”, promote event at other Club events.  
Investigate free advertising if available.  
Feature the Rotary Polio Eradication story.

A (Act):

Print tickets

Find sufficient numbers of volunteers.  
Determine appropriate location.  
Double check all paperwork.  
Schedule entertainment if necessary.  
Re-check time frames.

R (Review);

Minimize financial risk to Rotary Club.  
Strategic planning.  
Post-event review and debrief with all stakeholders.  
Use PE to take notes throughout process, develop and event “owners manual”.  
Don’t get too invested in the process, focus on the big picture, the “why”.

Y (You are Good to Go):

Celebrate and thank volunteers!