

What Rotary Leaders need to know about virtual fund-raising



- Fund-raising is any activity that solicits donations of cash
- Virtual or Online fundraising is new, but the fundamentals remain the same



Know the laws and best practises that apply in your jurisdiction



- Your club must approve by recorded motion the fund-raising project
- The end use of the funds must be identified
- Funds must be used for the purpose indicated
- Financial records must be maintained, along with copies of receipts for all tickets or donations made
- All costs associated with fund-raising must be identified



Do you need to be registered?



- Does your jurisdiction require registration for fund-raising.
- All jurisdictions have strict requirements for gaming projects and registering to hold gaming events.
- In addition to being registered for gaming you will need licenses for
 - Casinos
 - Raffles
 - 50/50 draws (there is not minimum exemption)
 - Square draws (Grey Cup) pools
 - Bingos



Transparency



- Your clubs name must appear on all advertising and tickets
- The purpose of the funds raised must be stated
- You must indicate a contact person
- You must provide a copy of your financial statements if requested
- All in person volunteers selling tickets should wear club identification
- Your donor lists should not be shared



Virtual Fund-Raising Events



- You are not dealing face to face
- Phone calls
- Email requests
- Social media appeals
- Web page appeals
- Video Conferencing media Zoom, Skype, Facetime etc
- Events attended by Video Conferencing, such as virtual dinners, games nights



Games night, multi player on line games



Email, and text fan outs



- Email or text your friends and acquaintances and ask them to support your project.
- Have them e transfer funds to you. Choose a password rotary
- You send them ticket(s)
- You deposit the funds raised
- The club holds a draw, with witnesses present
- Done



On Line Systems



- There are unlimited companies that will assist you in online fund-raising
- GoFundMe has been one of the first in the field and is widely used
- Rafflebox is popular in Alberta and used by many District 5370 clubs
- Eventgroove is a new American company being used by many Rotary districts in Zone 28 & 32 but is new to District 5370
- Trellis is widely used in Canada and is located in Kelowna
- The Rotary Foundation Canada accepts donations online



What will online fundraisers do



- Most online platforms offer to create online web pages and promote web pages and social media pages for:
- Virtual events
- Virtual auctions
- Donations
- Raffles
- Peer to Peer donations



What else do you need ?



- Open an account with the provider
- Obtain all permits needed for your jurisdiction
- All interested purchasers or donors are directed to an online payments platform such as Stripe.com or Square.com
- The payment platform charges for its services and if the referral comes from the virtual fundraiser it will add the fundraisers percentage to the charge



Sample virtual ticket

11/5/2020

Edmonton Strathcona Rotary Club 50/50 Cash Raffle



Name of purchaser
Address



Order #: 7c401e70-4619-41f5-88a0-085fcd7f5227

The draw AGLC-565813 will take place on November 6, 2020 at the "Meals on Wheels" Warehouse Edmonton. The winner will then be contacted by the [charity] to claim their prize! Your ticket reference numbers are below:

B-16721 B-16720 B-16719

If you would like to run a fundraiser please fill out our [Sign Up](#) form or if have any questions or concerns please visit our [Support Portal](#)



Critical Things to Understand



- You may only sell gaming related tickets within your jurisdiction and to people over the age of majority (18)
- For gaming tickets, a hard copy of the raffle ticket etc must be mailed to the purchaser. Local companies can do this, out of country companies will require that you do that.
- You must indicate when and where the draw will be held, and it must be witnessed by people not associated with the management of the draw.



How much does it cost?



- It depends! Buyer Beware There is no free lunch!
- Cost vary by vendor and the product the vendor handles but range from 4.9% to 7.9% of ticket price. There may be additional charges for mailing tickets to purchasers.
- Plus online payment processor fees range from 2.65% +C\$0.10 to 2.9% +C\$0.30 per transaction.
- Some of them allow the purchaser to “tip” the transaction fee to the bill so that the charity gets the full face value of the ticket.



The Agreement



- You will be required to accept their terms of use. This is a typical software product agreement, that favours the virtual service provider
- Obtain legal advice before proceeding to agree to their terms and conditions
- Where will disputes be resolved? Out of country resolution is difficult and expensive
- Be wary of arbitration clauses, they proprot to save money but are expensive and usually one sided



Agreement contd.



- Understand any indemnification clauses, check with your insurance agent as to liability that is covered by your insurance co.
- Understand where your data is being stored, Canada or USA
- Confirm with your jurisdiction that the company and services offered can be legally provided. This is especially true of gaming services.
- When will you get your money. As they are processed or at the end of the project.



Accountability



- Your club and its executive will be the ones held to account make sure you have done your due diligence
- Make sure you are protected from cyber attacks. Check your insurance and make sure that your providers have protection against cyber attacks and insurance.
- They must protect the credit card numbers of purchasers and help to resolve cyber breaches.



Using the District 5370 Charitable Foundation



- The Rotary District 5370 Charitable Foundation was established to provide assistance to clubs in fundraising for their charitable projects.

The Foundation is registered with the Canada Revenue Agency as a "public foundation". This means that it is able to collect funds for charitable activities and issue tax receipts for these funds. Foundation President - Julius Buskie buski@shaw.ca
Ph. (780) 973-6820

- <https://portal.clubrunner.ca/50012/SitePage/district-5370-charitable-foundation/charitable-foundation>



Don't forget The Rotary Foundation (Canada)



- When raising funds don't forget our own Rotary Foundation (Canada)
- TRFC can process payment online to yours or anyone's credit card
- Money donated to the TRFC works its way back into our local clubs through the District Designated Grants and to club international projects through the Global Grants.
- <https://my.rotary.org/en/login?destination=/en/take-action/give>



Buyer beware



- Check references with other clubs that have used the services of the company you are considering
- Don't be pressured. There are lots of providers out there.
- Consider doing it yourself, in house. Many clubs have sophisticated online and web page presences. You can add a panel to have donations through credit card processing company
- Check other clubs for their fundraising ideas, there is no copyright on ideas



Do it yourself donation button



Rotary Club of Edmonton Northeast
Rotary Club of Edmonton Northeast
Enter donation amount
\$0.00

Email

+1 Phone number


Full name

Card number MM/YY CVV Postal code

Save my information for a faster checkout

Donate

By clicking Donate, you authorize this donation, and agree it is non-refundable and made voluntarily without exchange of goods or services.

 Secure checkout powered by Square



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- <https://eventgroovefundraising.com/>
- <https://rafflebox.ca/>
- <https://trellis.org/>
- <https://ca.gofundme.com/>
- <https://stripe.com/en-gb-ca>
- <https://squareup.com/ca/en>
- <https://portal.clubrunner.ca/100984> (the Rotary Foundation Can)





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- <https://eventgroovefundraising.com/pricing/>
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Rotary Opens Opportunities





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