

Rotary District 5170

The anatomy of an Annual Fund Campaign

The **Annual Fund** campaign is an annual fundraising campaign to raise money for the World Fund/SHARE. One-half of the contributions to Annual Fund/SHARE go to Rotary's World Fund and one-half are returned in three years as District Designated Funds. *Our Grant programs such as Scholarships, District Grants and Global Grants come from our Annual Fund/SHARE giving.*

Every Rotarian Every Year (EREY) is a sub-campaign of the Annual Fund. It promotes Rotarians making a contribution of \$25 or more to the Annual Fund/Share each year.

Each Rotarian is encouraged and expected to support The Rotary Foundation annually fund with a contribution of at least \$25 as a part of *Every Rotarian, Every Year* campaign. In District 5170 most clubs suggest members become Double Sustainers (\$200) or more whenever possible.

Step 1: Plan outline

Before you can implement a successful Annual Fund campaign for your club you need to determine the basic outline or key elements of your campaign such as:

- A) What is your dollar goal?
- B) What is your intended timeline?
- C) Do you plan to ask for pledges?
- D) How specific will your ask(s) be?
- E) How will you communicate with your club members?
- F) How can members make their donations?

If you already have a regular Annual Fund campaign, the answers to these questions may be quick and easy. However, if you are new to an Annual Fund campaign or if you are interested in refreshing what your club does, spending some time answering these questions will be valuable. This is especially true in the era of COVID-19 where what we have done in the past is inevitably changing. It should not, therefore, be surprising that our approach to fundraising will need to change as well.

The great news is that many of your fellow Rotary District 5170 clubs have excellent Annual Fund campaigns that you can replicate.

Step 2: Establish your Annual Fund campaign committee

Once you have the outlines of your plan, it's time to establish your campaign committee. Some members should come from your Club Rotary Foundation Committee, but others may not since this is your Annual Fund campaign committee and therefore does not include fundraising for Polio, bequests, and international projects. The size and makeup of this committee should also be influenced the scope of your Annual Fund campaign. A simple, single mail/email solicitation, with perhaps one follow-up will not require a large committee. However, a comprehensive campaign which might include letters, personal asks, and multiple follow-up could involve dozens of Rotarians. (See Chapter 1: Committee Design).

Best Practice:

- Committee members must be donors themselves!
- Personal asks are always best! The more personal the better.
- Solicitors should donate at or above the level they are asking
- Select doers, not talkers
- Match donor “types” with fellow Rotarians – i.e. new Rotarians asking new Rotarians, PHS members asking for PHS donations.

Step 3: Finalize campaign and calendar action items

Working with your committee it’s time to flesh out your campaign. Identify individual action items, calendar each, and identify who is responsible for implementation. (See Chapter: Program Timeline, Chapters 6-8)

Best Practice:

- Start by calendaring key action items such as initial letter, etc.
- Work backward from target dates (campaign launch, end date)
- Be specific and comprehensive
- Include both an ask and at least one follow-up for those who have not donated (yet).
- Include general club communications during campaign such as Foundation Videos, Weekly Foundation Thoughts, etc.
- Don’t forget to include a celebration!

Step 4: Data/research

Gather historic giving data including:

- Historic Club Annual Giving numbers
- Individual giving (for personal asks)

Decide how you will monitor campaign activity

- Rotary reports (optimal)
- Excel/Google spreadsheet

Step 5: Gather/design campaign materials

Pull together a complete set of campaign materials including:

- Rotarian support materials (marketing)
- Recognition plan (what is it, how will you implement it, when will it happen)
 - Rotary has outstanding recognition materials, but you need to decide how you will utilize these.
- All Annual Fund gifts earn Paul Harris recognition.

Step 6: Draft initial ask

Assuming your campaign includes some form of “ask” (and it should), draft an initial Annual Fund campaign letter/email to club members. (See Chapter 3: Initial Letter to Members: Every Rotarian Every Year)

Best Practices include:

- Letters should be personal – no “Dear Rotarian!”
- Letters should be hand signed – no printed signatures and NO from “XXX Rotary.” I like blue ink as it stands out better.
- Letters should be signed by the “right” person – this probably is not you! Your Club President or the solicitor assigned?
- Letters should be specific – ideally you should ask for a specific amount based on their history of giving. This is nearly always the best approach. However, alternately you can give a few suggested levels such as \$200 as a Double Sustainer, \$1,000 to join the Paul Harris Society. etc. Even then, it’s best to use an appropriate giving spread so a PHS member does not get asked for a \$100 Sustainer gift.

Step 7: Implement your plan

Monitor your campaign activities and regularly update your campaign status.

Best Practice:

- Weekly monitoring
- Adjust campaign based on responses

Step 8: Recognize success and THANK, THANK, THANK

Best Practice:

- Thank before you bank!