

## **FUNDRAISING**

### **(from Rotary Learning Center Courses)**

#### **Planning fundraising events**

Work with your club committees on fundraising efforts. A successful fundraising event can support projects that make a real difference in people's lives.

The key to effective fundraising is to involve people that are passionate about planning successful events and/or the cause the fundraiser supports. Identify peoples' strengths and passions and match assignments accordingly – some like gathering silent auction items, some like contacting corporate donors or selling tickets, and some only like to handle the logistics of an event. All are necessary for a successful fundraising event.

1. **Determine what you need.** Set a target amount as your goal and identify the type of event that will really yield that amount.
2. **Establish a budget.** Find out what is available in your club budget to hold an event and determine what your expenses and anticipated revenues will be.
3. **Identify the resources required to meet your fundraising goals.** Determine how many people are needed to plan and carry out the fundraiser.
4. **Figure out logistics.** Choose an appropriate date and venue for the event.
5. **Minimize risks.** Evaluate whether the event activities might lead to potential losses to the club, and determine how those losses can be avoided.
6. **Organize volunteers.** Determine roles and tasks for volunteers, and involve community members. Set up a fundraising organizing committee.
7. **Publicize the event.** Work with the club public image committee to identify target audiences for your event in the club and the community, and plan how you will reach them. Notify the media about your event if appropriate. You will find a variety of promotional resources in the [Brand Center](#).
8. **Hold the fundraiser.** Encourage volunteers to monitor the event's progress, noting successes and challenges to be discussed during evaluation
9. **Manage funds appropriately.** Establish a tracking procedure before collecting any funds, and deposit funds in an account opened specifically for the event. Report how the funds are used to the club and donors.
10. **Recognize volunteers, contributors, and sponsors.** Send personalized thank-you notes, photos, and certificates if appropriate.
11. **Evaluate the effort.** Make note of what worked and what didn't so what you learned can be applied to future fundraisers.

12. **Ensure success for future fundraising efforts.** Discuss any outstanding concerns or issues with the incoming treasurer and with new members of the fundraising organizing committee. Be sure document the fundraising event process so the event can be replicated without reinventing the wheel!

You will find more event ideas and promotional resources in the [Event Planning Guide](#) in the Rotary Brand Center.

### **Using Rotary Marks**

Rotary's masterbrand signature (official logo) identifies Rotary and our commitment to improving communities worldwide. Rotary International owns trademarks and service marks (referred to as Rotary Marks and listed in the Voice and Visual Identity Guidelines and the Rotary Code of Policies) for the benefit of Rotarians worldwide.

When you reproduce the Rotary Marks, follow our Voice and Visual Identity Guidelines and the Rotary Code of Policies (article 33). Clubs can download logos for Rotary, Rotaract, and other Rotary programs in the Brand Center.

### **Naming guidelines**

In naming an activity, project, program, website, or publication, the Rotary club or other Rotary Entity must use its name and not just "Rotary" alone. A club can add its name to the name of the project, for instance. Proper naming examples include:

- Rotary Club of Evanston Cleanup Project
- Mountain City Rotary Club Centennial Park
- [www.anycityrotaryclub.org](http://www.anycityrotaryclub.org)

The Rotary club signature, which consists of the masterbrand signature plus the club name, should be used on all club communications and materials associated with a club activity, project, and program. For specific guidelines on naming club projects, see the Rotary Code of Policies or contact your Club and District Support representative.

### **Rotary Marks on fundraising merchandise**

Nearly 160 licensed vendors are authorized to produce merchandise featuring the Rotary Marks and to offer club management systems and other online tools. See My Rotary for a list of official licensees and Community Marketplace Resources to connect with vendors. Only licensed vendors are permitted to produce and sell merchandise with the Rotary Marks. If your club wants to raise funds for a project through merchandise sales, you can sell products featuring the Rotary Marks for a limited time as long as you purchase the merchandise from an official Rotary licensee and include this information on the items:

- Your Rotary club name or Rotary club signature
- Your fundraising event or project name
- The project dates

If your club wants to sell merchandise for a long-term fundraising project, you'll need to apply for a license. If your club wants to buy merchandise from an unlicensed vendor, that vendor must receive permission to use the Rotary Marks directly from Rotary International.

### **Risk management for projects**

You can help protect your club's assets and shield yourself and your club from liability by anticipating the possible risks associated with your club's activities. Being aware of risk and managing it will protect your members, program participants, and club assets.

Meet with the outgoing treasurer to learn about your club's risk management plan. Find out if the guidelines below are already in place and if any need to be set during your term.

Whether you're holding meetings, running fundraisers, or working with young people, risk management responsibilities are part of your role. In this context, "risk management" refers to a proactive process that aims to identify causes of possible loss and determine how to prevent them or lessen their financial impact. To manage risk:

- Review activities from the perspective of "What can go wrong?"
- Modify activities to lessen the risk
- Use contracts and agreements to clearly define roles and responsibilities of all parties involved (consult local legal counsel to draft and review legal documents)
- Follow established policies, procedures, and guidelines

We encourage clubs to obtain professional legal and insurance advice about liability protection.

Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability insurance through a program arranged by Rotary and paid for by U.S. Rotarians.