

Rotary Fundraising

District Training Assembly 2023

- Matt Risi
Old Mission Rotary
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- Co-Chair: San Diego County Winemakers Festival at the Maritime Museum (Rotary Event)
- Chairman: AMICI Ball for Our Lady of the Rosary Church
- Co-Chair for UNICO Italian-American Golf Tournament
- Chairman: So You Think You've Got Talent San Diego? (Old Mission Rotary Event)

- Benefits
 - Raise money for charitable causes
 - Build Camaraderie
 - Community Awareness
 - Attract New Members
- Challenges
 - Pressure on club members to give money
 - Work falls on the shoulders of a few
 - Competition with other events
 - Option to hire an Event Planner

Themes

Shows:

- Mariachi Festival- Route 78 Rotary
- So You Think You've Got Talent San Diego?- Old Mission Rotary
- Miss Fallbrook Teen Pageant- Fallbrook Village Rotary
- Comedy Hypnosis- La Mesa Sunrise and La Mesa Rotary Clubs
- Trivia Night- Chula Vista Sunrise Rotary
- Comedy Night- Point Loma Rotary
- Rotary Creates Magic- Encinitas Rotary
- Cinco de Mayo- El Cajon Rotary
- Golf Ball Drop- Encinitas Coastal Rotary

Sports:

- Ride the Point- Point Loma Rotary
- Low Tide Ride & Stride- Coronado Rotary
- Walk the Talk 5K- San Diego Coastal
- Bocce Ball- Del Mar-Solana Beach Rotary
- Pickleball Tournament- La Mesa Rotary

Golf Tournaments:

- Coronado Rotary
- Chula Vista Rotary
- San Marcos Rotary
- Oceanside Rotary
- El Cajon Noon Rotary
- Carlsbad Rotary
- El Camino Real Oceanside Rotary

Food:

- Baja Lobster Fest- Del Mar-Solana Beach Rotary
- Oktoberfest- Carlsbad Rotary
- Vines & Vittles- Rancho Bernardo Rotary
- Wine, Brews & Blues- Bonsall Rotary
- Wine & Vine Uncorked- Carlsbad Rotary
- Wine Festival- Encinitas Rotary
- Couer de Cuisine Culinary Festival- Escondido Rotary

Community Festivals:

- Fern Street Circus- Downtown Breakfast Rotary
- Holiday Street Fair- Rancho San Diego Rotary
- Concert at the Lakes- Santee-Lakeside Rotary
- Spring Flower Baskets- Escondido East Rotary
- Annual Poinsettia Fund Raiser- Rancho Bernardo Rotary
- Vista Strawberry Festival Booth- El Camion Real Oceanside Rotary
- Poway Rotary Parade- Rotary Club of Poway

Evening Galas:

- Great Gatsby Gala- Escondido After Five Rotary
- Sunset Soiree- Del Mar Rotary
- San Diego and Tijuana Community Gala- Coronado Binancial Coronado
- Havana Nights- El Cajon Rotary
- Fabian Aguayo Charity Fundraiser- San Diego Downtown Evening Rotary
- A Night in Buenos Aires- Chula Vista Eastlake Rotary
- Polynesian Luau- La Jolla Sunrise Rotary

Virtual Events

- Non Event Fundraisers- just ask for money
- Entertainment/Programs on ZOOM
- Website for Donations
- Website for Shopping
- Silent Auctions online

Standard Fund Raiser Model

- Income
 - Ticket Sales
 - Sponsorships
 - Silent and Live Auctions
 - Raffle
 - Pledges- Paddle Raise
- Costs
 - Cost of the Venue
 - Catering
 - Entertainment
 - Advertising
 - Prizes
- Expenses
 - Advertising- Print, Web and Media
 - Event Operations- Security, Clean Up, Audio/Visual
- Profit
 - Disbursed to club charities
 - Refill Club/Foundation coffers

Generating Attendance-Traditional

Who is your target market?

- Club Members
- Family
- Friends
- Business Associates
- Neighbors
- The Local Community
- Media- Pay or Free Public Service Spots

Charity Partner Model

- Partner with one or more non-profits who will help with:
 - Raffle ticket sales
 - Raffle prize donations
 - Silent and live auction prize donations
 - Securing of sponsors
 - Involvement in planning meetings
 - Sending volunteers to work the event
- In exchange for their participation, beneficiaries are expected to receive a certain percentage of proceeds from the event. By making beneficiaries participate at this high level, they take on a vested interest in the success of the event (since higher proceeds equate to higher contributions to their non-profit). It becomes a win-win for everyone involved. Profits can be shared between charities or between your club and a charity.

Interact and Rotaract Clubs

- The event venue can be the High School or University facilities such as fields or auditoriums where the clubs are located
- Another network of people exposed to the event including school faculty and parents
- Additional staffing for the event

Profit Sharing with Interact, Rotaract and other Rotary Clubs

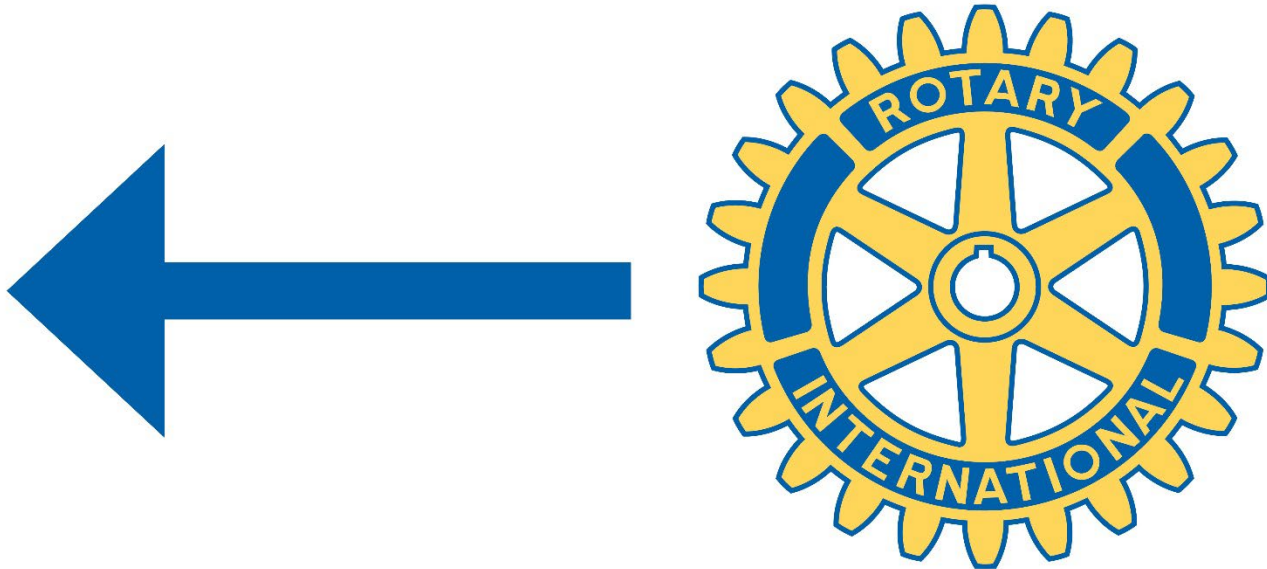
- Another network of people and businesses exposed to the event
- Additional staffing for the event
- Co-Sponsors can get the profit portion of all income generated by their clubs: tickets, raffle tickets, silent or live auction items etc.

The Venue

- The right size for your event
- Venue cost- Do the math backwards!
- Convenient Location
- Technical Staff for Audio/Visual
- Parking
- Signs at the event: Entrance, Parking and Registration Table
- Lighting, electrical power and water
- Security
- Staffing the event- Set up and clean up
- Chairs and tables
- Heat lamps for evening events outside
- Room to expand next year

Signs

ROTARY EVENT



Time and Date

- Consider the best time of day for the event
- Food: Appetizers not enough for mealtimes
- Competing events at the venue
- Remember public holidays
- School vacation schedules
- Conflicts with other Rotary International and District 5340 Events
- Major sports and cultural events in town

Marketing

- Who is your Market?
- Establish the image of the event early
- Plan for a standalone Website or at least use your club website to advertise
- Invitations: postcards to hand out and mail
- Posters for windows and message boards: 11x17
- Ticket printing: Numbered with tear off stub
- Social media such as Facebook: SHARE Button
- Souvenir Programs for the event- Sell advertising space
- Promotional Backdrop for photos
- Media and Press Releases
- Photos or videos of your event for future use
- Promote the event in District 5340 with the Newsbits Newsletter
(Editor Sandy Pugliese: sandyp304@gmail.com)

Event Ticket

Name

Phone

Email

So You Think You've Got Talent San Diego!

Saturday, May 18th, 2019 Reception starts at 5:30 p.m.



Francis Parker Upper School Concert Hall
6501 Linda Vista Road
San Diego, CA 92111



THOUSAND SMILES
FOUNDATION
FUNDACIÓN MIL SONRISAS

☐ \$100 Ticket - \$75 Tax Deductible (501c3 Tax Id: 33-0589382)
Free Parking • Casual Dinner • Hosted Bar • Silent Auction

"\$100 for 1,000 Smiles!"

Presented by Old Mission Rotary Foundation, The Kearny Mesa Rotary Club and Francis Parker Interact Club in support of Thousand Smiles Foundation, Old Mission Rotary Foundation and The Kearny Mesa Rotary Club. Visit: www.GotTalentSanDiego.com for details

Raffle Ticket

Name

Phone

Email



Opportunity Drawing

Suggested Donation \$20 per ticket

3 for \$50 - 7 for \$100

1st Prize \$1,000 Cash

2nd Prize \$250 Cash • 3rd Prize \$100 Cash

Drawing will take place at the gala event

So You Think You've Got Talent San Diego!

May 18, 2019 - Need not be present to win.

Proceeds Primarily Benefit the Thousand Smiles Foundation

**Sponsored by Old Mission and Kearny Mesa Rotary Clubs
& Francis Parker Interact Club**



**THOUSAND SMILES
FOUNDATION**
FUNDACIÓN MIL SONRISAS

Flyers and Posters



Saturday, May 18th. Reception at 5:30PM, Talent Show at 6:30PM.

**FREE Parking, Casual Dinner, Hosted Bar, Silent Auction
Presented by Old Mission Rotary and Francis Parker Interact Clubs
in support of**

Thousand Smiles Foundation

The **Thousand Smiles Foundation** was established by a group of Rotarians from the San Diego area in 1985, to provide free professional medical treatment to patients with maxillofacial deformities who, without our help, would go untreated, to use our facilities to provide dental care to under privileged children and to promote a bilateral interchange of medical, dental and surgical techniques between the medical professionals from the USA and the countries in which we work.

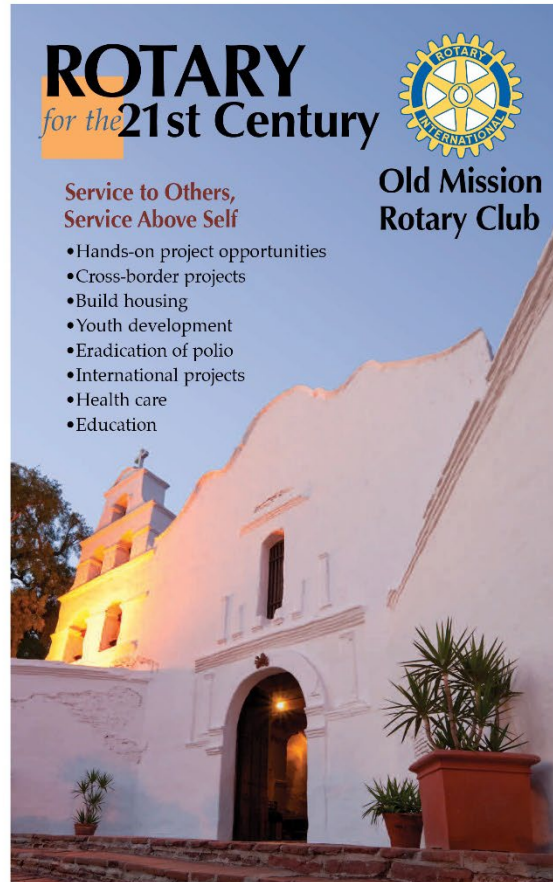
Old Mission Rotary presents an exciting annual talent show gala to raise funds for a special partner organization. Again this year, the **So You Think You've Got Talent San Diego Gala Fundraiser** will benefit the **Thousand Smiles Foundation**.

YOU CAN HELP! How?

- **BE A SPONSOR.** \$5,000, \$2,500, \$1,500, \$800 and \$500 level sponsorships are available.
- **BUY TICKETS.** At only \$100 each (\$75 is tax deductible), it's a bargain for a great night's entertainment.
- **DONATE SOMETHING FOR THE SILENT AUCTION.** An item, your service...if you have an idea, ask.
- **ENCOURAGE SOMEONE WITH TALENT TO ENTER THE CONTEST.** It's free, with \$\$\$ prizes.

**Questions? Contact Steve Nunez at
gottalent@oldmissionrotary.org or call 858-480-5033**

Souvenir Program



Eighth Annual So You Think You've Got Talent San Diego? Program and Silent Auction Guide



Produced by the
Interact Club of Francis Parker
Old Mission Rotary Club
and the
Kearny Mesa Rotary Club



To benefit the Thousand Smiles Foundation



**THOUSAND SMILES
FOUNDATION**
FUNDACIÓN MIL SONRISAS

Sponsors

- Several levels all to include as an incentives:
 - Complimentary Tickets
 - Advertising on the website and printed program
 - Introduction at the event
 - The Sponsor needs to see what they will be receiving for their support
- Individuals and Club Members:
 - A \$250 level may include two tickets to the event

Typical Corporate Sponsors Often Businesses of Club Members

- Attorney
- Auto Dealer
- Banks
- Casinos
- CPA's
- Doctors and Dentists
- Financial Planners
- Home Improvement Contractors
- Hotels and Resorts
- Insurance Agents
- Mortgage Brokers
- Retirement Homes
- Mortgage Company
- Party Rental
- Real Estate Agents
- Travel Agency

Timeline

- Committee meets at least six months before the event
- Save the Date announcements four months ahead
- Invitation Postcards: mail and hand out two months ahead
- E-mail blasts- One Month Ahead
- Posters: Post in local businesses and public places
- Promotion via the district web site and Newsbits e-mail newsletter
- Press Release: Free public announcements and low cost media buys
- Invite Newspapers Magazines and TV to cover the event for next year's publicity

Old Mission Rotary San Diego's Got Talent

Logistics

- Venue: Francis Parker
- Date: Saturday, May 18

Committee

- Determine budget & goals
- Decide on venue
- Decide on possible dates

Venue Coordination Assigned to: _____

- Talk to venue to secure a date
- Coordinate a walk-through of the event space prior to event
- Secure tables and chairs for auction/food & belly bars
- Secure linens for tables & belly bars
- Handle any details related to the venue including janitorial services and AV technician

Auction Assigned to: _____

- Solicit donations
- Encourage Rotarians & folks from Thousand Smiles to solicit items
- Collect & store items
- Create packages & bid sheets
- Set up day of event
- Coordinate close-out of the auction
- Secure volunteers to help day of the event
- Thank auction donors
- Ensure auction item purchasers receive thank you letters

Sponsorships Assigned to: _____

- Solicit sponsorships
- Encourage Rotarians & folks from Thousand Smiles to solicit sponsorships
- Track sponsorships

- Ensure sponsors are thanked and receive recognition they were promised

Opportunity Drawing Assigned to: _____

- Take the lead on promoting the opportunity drawing
- Encourage Rotarians & folks from Thousand Smiles to sell tickets
- Secure prizes

Food & Beverage Coordination Assigned to: _____

- Secure caterer
- Select menu
- Secure coffee donation
- Coordinate dessert with Francis Parker Interact

Entertainment Assigned to: _____

- Coordinate the setup of the website to receive video submissions
- Distribute flyers to schools & other venues to encourage submissions
- Coordinate a team to review the videos and select performers
- Notify those who submitted a video whether or not they have been selected
- Communicate with performers on the details of the event
- Secure judges for the night of the event
- Coordinate volunteer group to assist with dress rehearsal and the night of the event

Marketing & PR Assigned to: _____

- Create flyers, brochures and promotional materials
- Design program for night of event
- Design sponsorship power point
- Donation cards for paddle raise

Other

- Secure an emcee
- Secure an auctioneer (if doing a live auction)
- Video and/or speaker prior to paddle raise
- Clean up crew

Raffles

- Allow for advanced sales as well as at the event
- An easy way for people to support the event that cannot come
- Solicit prizes for the Raffle from businesses
- Need Not be Present to Win
- Purchase prizes for the Raffle
 - Flat Screen TV \$500
 - Southwest Airlines Travel Vouchers \$500
 - Cash prizes
 - Raffle a prize for every 100 tickets sold (100 Tickets x \$20 each yields \$2000 less a \$500 prize nets \$1500)

Non Profit Raffles in the State of California

- State of California Department of Justice
Office of the Attorney General:
<https://oag.ca.gov/charities/raffles>
- Download Forms:
https://oag.ca.gov/sites/all/files/agweb/pdfs/charities/raffle/ct_nrp_1.pdf?
- Register with the DOJ. Cost is \$20
- After event report is required to the DOJ

Silent and Live Auctions

- Solicit items:
 - Restaurant Gift Certificates
 - Rounds of Golf
 - Hotel Stays
 - Tickets to sport and cultural events
 - Experiences such as sailing and airplane rides
 - Artwork
 - Theme Baskets- Mexican, Italian, Baseball, Movies etc.
- Potential problems:
 - Realistic minimum bids
 - Well organized Silent Auction closing
 - Talented Auctioneer for Live Auctions
 - **Payment and Check Out Table- Credit Cards!**
 - New Technology using Mobile Devices to Bid
 - Sales Tax

Pledges- Paddle Raise

- MC or Charity Spokesperson appeals directly to the crowd to pledge money after an emotional appeal
 - Example for Thousand Smiles
 - \$500 pays for a cleft palate surgery
 - \$250 pays for a child's dental surgery
 - \$50 pays for teeth cleaning for a child
- Event Staff Identify Pledge Givers in the audience
 - Numbered paddles or programs can be distributed at event check in and linked to pre-swiped credit cards
 - Staff hands out colored cards with dollar amount as pledges are made during the pledging

Sales Tax

- Sellers Permit or Temporary Sellers Permit (If needed less than 90 days) from the **California Department of Tax and Fee Administration**
- <https://www.cdtfa.ca.gov/industry/temporary-sellers.htm>
- Each city has a different sales tax rate (City of San Diego sales tax rate is 7.75%)
- Tickets- Charge sales tax on cost of food & beverages provided. List this cost on the ticket.
- Live and Silent Auctions- Sales tax must be collected for the final auction bid price paid.

What is Not Subject to Sales Tax

- Sales of tickets for concerts, movies, plays, shows and similar events when food and meals are not included in the ticket prices.
- The sale of travel, home rentals, guide services, tutoring and other things of value that are not physical products.
- Sales of gift cards, gift certificates and coupon books.
- Sales of advertising that does not involve exchanges of merchandise or goods.

Alcohol Permit- Daily License

- To serve alcoholic beverages requires completing a Daily License Authorization (ABC Form-221) from the California Department of Alcoholic Beverage Control (ABC) and paying a fee.
- Register online: <https://www.abc.ca.gov/licensing/license-forms/form-abc-221-instructions/>
- Police Department permission may be required (see list on ABC website).
- The ABC office in San Diego is located at 8620 Spectrum Center Boulevard in Suite 302. The office number is (858) 300-6855.
- The ABC office in San Marcos is located at 570 Rancheros Drive in suite 240. The office number is (760) 471-4237

Insurance for the Event

- Rotary Insurance for liability is with Gallagher/Insight
- Active U.S. Rotary clubs and districts and Rotaract clubs are provided with general liability ("GL") and directors & officers/employment practices liability ("D&O/EPL") insurance through the U.S. Rotary Club and District Liability Insurance Program ("Program"). The Program is financed by insurance assessments collected from U.S. Rotarians on the July Club Invoice.
- **You may need to present a certificate of insurance for your event.** To obtain a certificate of insurance or an insurance policy, contact the insurance broker, Gallagher/Insight.
- Email rotary@ajg.com
Website: rotary@ajg.com
 - username: rotary@ajg.com
 - password: rotarian1

Post Event Review

- Number of attendees
- Number of Sponsors
- Ticket sales
- Raffle ticket sales
- Sponsorship Revenue
- Live and Silent Auction Income
- Net proceeds: Income less Direct Costs and Expenses
- Thank you letters or Phone Calls as appropriate

1:58 PM
01/24/14
Cash Basis

Encinitas Wine Festival
Profit & Loss
July 2003 through June 2013

	Jul '03 - Jun 13
Ordinary Income/Expense	
Income	
Direct Giving	480.00
Income Received	2,338.33
Misc.	300.00
Misc. Donations	640.00
Raffle Tickets	51,459.00
Silent Auction	165,086.14
Sponsors	
Cellar Select	35,000.00
Collector Sponsors	2,445.00
Connoisseur Sponsors	27,500.00
Grand Cru - Major Sponsor	87,500.00
Misc. Sponsor	1,169.00
Private Reserve Sponsors	35,000.00
Recycle Bags - Sponsor	4,000.00
Sommelier Sponsors	53,000.00
Total Sponsors	245,614.00
Ticket Sales	558,078.00
Total Income	1,023,995.47
Expense	
ABC Permits & Others	569.00
Audio Expense	8,055.25
Bank Charges	25,245.07
Catering/Restaurants	23,110.87
Decorations	9,347.27
Entertainment	10,175.00
Equipment Rental	22,616.84
Green Event Fees	2,005.09
Miscellaneous	7,708.16
Parking	8,268.93
Postage	2,164.64
Printing	40,283.31
Promotion	5,603.05
Raffle/Auction expenses	1,775.59
Signs	2,655.66
Site rental & expense	29,808.30
Supplies	14,281.58
Web Expenses	12,320.00
Wine Festival Director	23,700.00
Wine Glasses, Trays & Promo's	22,811.59
Total Expense	272,505.20
Net Ordinary Income	751,490.27
Net Income	751,490.27

District Resources

- Rotary5340.org
 - Go to *Clubs* pull down menu at the top
 - Click on fundraising
 - Click on various topics
 - Links to PDF documents
- Promote your event with the Newsbits Newsletter
Editor Sandy Pugliese: sandyp304@gmail.com