

# THE LINK BETWEEN GOOD PROJECT MANAGEMENT AND SUCCESSFUL CHARITABLE FUNDRAISING

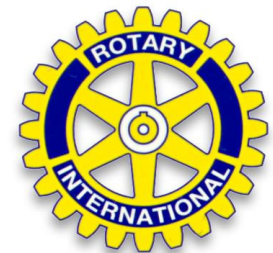
**ROTARY DISTRICT 7030 CONFERENCE**

**BARBADOS, APRIL 2011**



# Rational

- The difference between doing what we have always done and THINKING BIG!



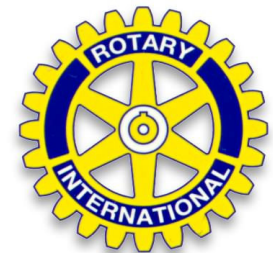
# Choosing a Project (1)

- Will the project be supported by the community and involve community stakeholders?
- Does the project match your club's pattern of community involvement?
- What is your club's community service history?
- Is the project attractive to your club's members?
- What financial and time commitments will be required of your club?
- How long will the project last?



## Choosing a Project (2)

- Will the project be sustainable?
- How can you work with Rotary's partners in service?
- How will be other community organizations be involved in your club's projects?



# Making a Plan

- Implementing successful service projects require involvement of all club members
  - Profession related to the service
  - International experience
  - Community experience
- Project Committees should represent a diverse cross-section of abilities.
- Don't be afraid to look externally for additional expertise.



# Making a Plan – Project Tasks

- Community Assessment and Analysis
- Project Selection
- Project Planning
- Project Fundraising and budgeting
- Project Implementation
- Volunteer Coordination
- Project Monitoring and Evaluation
- Community Relations and Coordination
- Project Public Relations
- Project Documentation



# Setting Project Goals & Objectives

- One of the Project Committee's most important task is creating effective goals and objectives for a service project.
- **GOALS** are a broad description of what the project is meant to achieve while **OBJECTIVES** are specific aims based on those goals.
- Project goals are important for organizing a project, defining its scope, and measuring how well a project succeeds



# Characteristics of Effective Goals

- **Shared** – a shared project goal is one that represents the aspirations of all involved.
- **Challenging** – A challenging project goal should be ambitious and go beyond what clubs have achieved in the past.
- **Achievable** – A realistic goal is based on a realistic assessment of materials, resources and time.
- **Measurable** – A goal's objectives should have a tangible, quantifiable point to pursue.
- **Time – specific** – A goal's objectives should include a specific time frame for a project's completion.





# Developing a Project Work Plan

- With the goal's in mind, create a simple work plan. The work plan should include:
  - Specific tasks
  - Individual responsibilities
  - Resources
  - Budget
  - Project timing and deadlines
  - Anticipated task outcomes



# Developing a Budget

- Realistic financial expectations, outlined in a detailed budget will lessen the chances of unforeseen costs arising as the project progresses.
- Base the budget on your work plan.



# Transparency & Accountability

- Research local laws and regulations that may apply to the project
- Write a statement of financial stewardship and accountability
- Create a bank account for project funds
- Collect receipts for all project expenditures and provide receipts to individuals who donate money or project materials
- Compare receipts with financial accounts regularly
- Develop a system for independent auditing of project finances
- Make regular written reports to project and community stakeholders describing project income and expenses



# Project Liability and Protection

- How would your club react if an accident occurred during a service project or related event?
- Does your club have a plan in place to deal with emergencies?
- Are you protected legally?



# Raising Funds

- What are the sources for raising funds for your project? Typical sources of funding include:
  - Individuals
  - Businesses
  - Foundations
  - Nonprofit or nongovernmental organizations
  - Government agencies



# Some Things to Think About

- PROJECT MANAGEMENT
  - Who will serve on your club's project committee?
  - How will this committee be organized?
  - What are your goals and objectives?
  - Are your project goals and objectives shared, challenging, achievable, measureable, and time-specific?
  - What specific tasks are needed to achieve each project goals and objectives?
  - When will each of your project tasks be completed?
  - Who will be responsible for completing each of your project tasks?



# Some Things to Think About

- Project Management cont'd:
  - What financial and material resources do you need for each of your project's tasks?
  - What are the anticipated outcomes of each of your project's tasks?
  - Based on your project work plan, what income and expenses do you anticipate for each project task?
  - Do you have a transparent system of accounting for project finances?
  - Does your club have a plan for dealing with accidents and emergencies during a service project?
  - Have you considered possible project liabilities and ways to protect your club?



# Some Things to Think About

- Fundraising:
  - How will you move your club from planning to action?
  - How will your club raise money for a project?
  - Who in your club will be responsible for fundraising?
  - How will you research potential donors in your community?
  - Is your project eligible for a Rotary Foundation grant?





# Some Things to Think About

- Club Administration

- Who will coordinate volunteer activities for your club's project?
- Is any training or preparation needed before volunteers begin their work?
- How will you keep all project participants motivated?
- Does your club have a public relations strategy for your project?
- Are your promotional materials in compliance with Rotary policy?



# THANK YOU

## QUESTIONS AND ANSWERS

