

Module B-6 Building Successful Fundraising Strategies (90 minutes)

	Step?	We want to accomplish?	How long?
1.	Introduce Topic and Presenter(s)	Provide topic – have participants open PETS Learning Guide, B-6: Building Successful Fundraising Strategies. Introduce concepts in fundraising resource materials. Refer to the three objectives. Introduce presenter(s).	10 min
2.	Main Room/ Content Overview	1st Learning Objective: Identify fundraising purposes and best practices. Facilitate discussion: What are the current fundraising purposes and best practices in your club? Which fundraisers have raised the most money for the work of Rotary within your community? Which fundraising practices have done the most to promote the work of Rotary within your community? List three keys to success. See Breakout Discussion Questions	20 min
3.	Breakouts/ Discussions	2nd Learning Objective: Identify the role of Club President in club fundraising development. Facilitate Discussion: Refer to fundraising excerpts in your PETS Learning Guide. As Club President, how do you plan to engage club members to create a successful new fundraiser which will both raise funds and elevate the membership of your club? (Not just planning the project, but planning the leadership actions / communications to engage members for achieving a successful fundraising project.) Share the key steps.	20 min
4.	Breakouts/ Discussions	3rd Learning Objective: Evaluate fundraising options in light of perceived club culture Facilitate Discussion: Have participants turn to the fundraising section. What is the common theme of these financial best practices? Refer to Signature Projects article in your PETS Learning Guide. Which of your clubs have a signature project? What is your signature project? What makes a fundraiser right for your club? (No right answer.) How does a signature project and its fundraising event foster an ongoing awareness of the impact of Rotary within your community? Share your three critical impacts.	20 min
5.	Sharing Back/ Q & A	Ask for good ideas to share, takeaways, and best practices. Ask for any questions and respond briefly.	15 min
6.	Wrap Up and Evaluations	Thank participants for an impactful and inspiring session. Ask them to go to notes page at end of module and jot down their thoughts. Remind participants to complete module evaluation via mobile app. Proceed with transition to next module topic and facilitator.	5 min

Lone Star P.E.T.S. 2026

PRESIDENTS-ELECT LEARNING GUIDE

SATURDAY

MODULE B-6 BUILDING SUCCESSFUL FUNDRAISING STRATEGIES

GOAL

Club Presidents will possess knowledge and insight about how to lead their respective clubs in effective fundraising strategies.

OBJECTIVES

At the end of the session, Presidents-Elect will be able to:

1. Identify fundraising purposes and best practices.
2. Identify the role of Club President in club fundraising development.
3. Evaluate fundraising options in light of perceived club culture.

REFERENCE MATERIALS

Planning Fundraising Events

Fundraising

Signature Projects

Event Planning Guide

Module B-6: Building Successful Fundraising Strategies

Breakout Discussion Questions

1. What are the current fundraising purposes and practices in your club? Which fundraisers have raised the most money for the work of Rotary within your community?
Which fundraising practices have done the most to promote the work of Rotary within your community?
List three keys to success.
2. Refer to fundraising excerpts in your PETS Learning Guide.
As Club President, how do you plan to engage club members to create a successful new fundraiser which will both raise funds and elevate the membership of your club?
(Not planning the project but planning the leadership actions / communications to engage members for achieving a successful fundraising project.)
Share the key steps.
3. Have participants turn to the fundraising section.
What is the common theme of these financial best practices?
Refer to Signature Projects article in your PETS Learning Guide.
Which of your clubs have a signature project?
What is your signature project?
What makes a fundraiser right for your club? (No right answer.)
How does a signature project and its fundraising event foster an ongoing awareness of the impact of Rotary within your community?
4. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
5. What is your **primary takeaway** from the Fundraising session?
6. Any other question(s)?

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. If your club chooses to organize a fundraiser, include the following steps:**

1. **Determine what you need.** Set a target amount as your goal and identify the type of event that will realistically 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. Use [Rotary Ideas](#) to help you plan your event and meet your fundraising goals.
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.

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

[My Rotary](#)[Donate](#)[Get Involved](#)

Fundraising

How can I fund my project?

You may be able to pay for your project entirely through fundraising events, such as charity dinners, walkathons, or online auctions. These events will not only help you raise money for your project, but also awareness for Rotary and The Rotary Foundation. Some possible fundraiser events are:

- Skip a meal at your club meeting and donate the cost
- Organize a walkathon, bike-a-thon, or skate-a-thon
- Honor a special person in your life with a memorial or tribute gift
- Collect pennies to [end polio](#)

- Organize a purple pinkie project to end polio

Creating a fundraising plan

Before hosting a fundraiser, you should create a plan that:

- Identifies your fundraising needs
- Establishes a budget
- Considers and addresses local laws for fundraisers
- Determines available resources in your community
- Outlines the event's logistics (such as selecting the location, ordering supplies, and arranging for set up and tear down)
- Describes how volunteers will be organized
- Considers how to publicize the event
- Provides ways to measure its success

What are other ways to fund my project?

In other cases, you'll need to turn to outside sources to fund your project, such as those listed below.

- Individual donors
- Businesses
- Foundations (including The Rotary Foundation)
- Nonprofit or nongovernmental organizations
- Government agencies
- Other Rotary clubs

How can I get funding through Rotary?

The contributions you make to The Rotary Foundation make possible a variety of grants to help fund your local and international projects and activities. Find one that's right for you at [Explore Grants](#).

What are the benefits of fundraising for The Rotary Foundation?

When you give to The Rotary Foundation, you help advance communities, improve health, and promote peace. Your support is essential to make grant-funded humanitarian projects, scholarships, and activities, such as vocational training teams possible.

What's more, the money you raise for the Foundation benefits you, your club, and your district. Here's how:

Annual giving

When you donate to the Annual Fund-SHARE, a portion of those funds becomes available to your district each year through the District Designated Fund. At the end of three years, your district can use this money to pay for Foundation, club, and district projects.

Help your fund grow by participating in the Every Rotarian, Every Year fundraising effort. Learn more

about [Foundation funding](#).

Major giving

When you make a gift of \$10,000 or more, you are providing crucial support for Rotary. If you give to the Endowment Fund, you are ensuring a strong future for the Foundation by providing a continuous stream of income to fund Foundation grants and activities.

Learn more about Rotary's [Endowment Fund](#) and [Planned Giving](#) opportunities.

Matching gifts

Thousands of companies match gifts to The Rotary Foundation. Find out if your employer does and double the amount of money you donate — and receive in return — to fund Foundation projects and activities.

You can set and track your Foundation giving goals in [Rotary Club Central](#).

Donor recognition

The Rotary Foundation is grateful for the generous support of its donors. Learn about [donor recognition](#) opportunities for individuals and clubs.

Resources & reference

- [The Rotary Foundation Reference Guide](#)
- [Every Rotarian Every Year brochure](#)

- [Connect for Good](#)
- [End Polio Now website](#)
- [The Rotary Foundation logo](#)
- [Club Rotary Foundation Committee Basics](#)
- [District Rotary Foundation Committee Intermediate](#)
- [Doing Good in the World - Every Rotarian Every Year \(EREY\) club presentation](#)

Tools

- Feature your project on the [Service Project Center](#)
- Track your fundraising progress in [Rotary Club Central](#)

Rotary support

- [Club](#) and [district](#) Rotary Foundation committees
- [Regional Rotary Foundation coordinators](#)
- [Endowment/Major Gift Advisers \(EMGA\)](#)

What Is Your Club Known For?

One of my most favorite Rotary activities is to visit clubs that are new to me. I frequently walk in, introduce myself to a member, and ask them to tell me about one of their club's projects.

All too frequently, what follows is a description of the club's Auction or Golf Tourney or Pizza Bowl — a fundraiser, but not a service project — which is, after all, the reason Rotary exists.

If club members, when asked to share something about their club, immediately focus on how the club raises money and ignore the service aspects of what we do, how is Rotary to share the good word of our successes? How are we to engage potential members if we stress the *how* of what we do, but not the *why* or the *what*?

Rotary leadership training programs often describe the importance of the "elevator speech," the opportunity to condense the essence of our Rotary experience into a few sound bites when we have an opportunity to explain Rotary to a stranger.

As leaders in this movement, it is critical that we spread the word to club members that, when given the opportunity to talk about Rotary, they should be sure to include how their local club supports a scholarship fund or food pantry or home heating oil fund. How Rotary is ridding the world of a crippling disease. How Rotary is making a difference on the ground through our humanitarian grants.

And only when the follow-up question comes, "how do Rotary members find the money to do all this?" should we talk about the Wine Auction or the Polar Bear Plunge.

—Marty Helman

Public Image



Signature Projects Deliver Significant Benefits

By Rotary Zone Coordinator Gayle Knepper

Many clubs are looking for ways to become involved in a new area of service — in other words, a new project — to meet changing needs of their communities, re-motivate members and stimulate involvement from non-Rotarians. If this describes your club, now may be the time to consider a signature project.

A signature project is a significant service initiative, one for which a club is clearly recognized in the community and that differentiates it from other organizations.

Small projects, while worthwhile, are difficult to leverage into lasting community impact and awareness. A major project, on the other hand, creates a "signature" for the club, one which establishes public recognition that Rotary is a dynamic, action-oriented service organization and one in which others want to get involved.

Signature projects can range from the purchase and staffing of a Rotary bookmobile traveling throughout the city to an annual regional marathon that raises funds to support homeless teens.

Attributes of a signature project include substantial size, scope and duration: it continues or repeats regularly for a number of years. It integrates most functional areas of a club, all or nearly of its members (many clubs have a goal of 100% member involvement) and engages outside partners and community members. It usually addresses a significant and recognized need.

The benefits? In addition to providing service in response to an important community concern, it increases visibility of the club, attracts new funding sources, increases hands-on service by members, motivates non-Rotarians to become engaged and often provides an opportunity for a Foundation grant. All accomplished by a single project.

A signature project requires careful advance planning due to its size and impact, but the results of a signature project for the community and the club are well worth the commitment.

One remarkable example of a significant signature project in Zone 24 is "Rotary Park," developed by the Novosibirsk Initiative club (District 2225). Although still under construction, the nearly \$500,000 project to serve handicapped children is already delivering benefits to the community and to Rotary, and supported an increase in club size of nearly 90% since 2012.

[Read the full story.](#)

If your club is considering a signature project, contact the Rotary Coordinator in your region to discuss steps to get started or check the Signature Project resources page at www.GreatIdeasToShare.com.





EVENT PLANNING GUIDE



Hosting or participating in an event is an excellent way to raise your club's profile, and Rotary's, in your community. Community events also offer an opportunity to raise awareness, establish relationships, inspire action, and highlight the progress Rotary has made in your area. It can start conversations among local leaders and influencers and get them involved in Rotary.

This guide, which includes ideas to get you started, a planning checklist, and a list of resources, will help you use events effectively.



1

DECIDE WHAT THE EVENT SHOULD ACCOMPLISH

Holding an event can be the perfect strategy for meeting club goals.

- + Do you want to raise awareness of Rotary in your community?
- + Does your club want to attract new members?
- + Do you need to raise funds?
- + Do you want to position your club's members as resources and experts in the community?

2

CHOOSE THE TYPE OF EVENT THAT'S BEST FOR ACHIEVING YOUR GOALS

KEY

-  EASY
-  MEDIUM
-  COMPLEX

IDEAS FOR BUILDING AWARENESS OF ROTARY



Be an exhibitor at a local event: Reserve a booth or table at a farmers' market, block party, convention, etc. Find volunteers to staff the booth and give out materials about Rotary.



Sponsor a major event in town: Perhaps an annual parade in your community can become the Rotary Club of [Your Town] Parade. Or start an annual run/walk under your club's name.



Hold a one-day Rotary festival: Feature local musicians and artists, food from local restaurants, and booths representing local businesses. Give the festival a name — Main Street Rotary Club of [Your Town] Fest, for example — and have club members there throughout the day to chat with attendees about what Rotary does and how your club works in the community. Collect email addresses and phone numbers of attendees to use for recruitment. If you can make the festival an annual event, it will become a reliable tool for generating interest and new members.



IDEAS FOR ATTRACTING MEMBERS

Hold a membership day: Have each member invite someone who has shown an interest in Rotary. Make sure your program has both a social and an educational component. For example, schedule a meet-and-greet hour with refreshments, then have a notable speaker discuss a topic of interest to the community. Welcome your guests by introducing your club and several members. Follow up by telling guests the steps they can take to get involved or to join.



Give a presentation in the community: Attend a meeting or event of another association or organization and give a presentation about Rotary and your club. Be sure to bring membership and club materials for attendees. Invite interested community members to your next meeting.



Co-host an event with another organization: Cross-promotion is an effective way to increase membership. Work with another organization from your community to host an event that gives members of both groups a chance to network and learn how to get involved. As an incentive, offer a reduced first-year membership fee for the other organization's members if they join your club.



IDEAS FOR FUNDRAISING

Host an artisan market: Invite local artists to sell their work, paying a fee for space, then donate the proceeds to The Rotary Foundation. Such a market can promote your club's community and international projects and encourage attendees to contribute to the Foundation themselves. Use your resources and connections to ensure that your event meets high standards. Invite local chefs, brewers, or bartenders to serve samples of their food and beverages to draw visitors.



Pair a fundraising event with a silent auction: Sell tickets to a full-service event that includes food and beverages, dancing, and a compelling speaker with a connection to Rotary's causes. Proceeds can go to The Rotary Foundation or a club project. Adding a silent auction will boost your fundraising. Gather items of value from corporations and community partners, as well as offering professional services by club members.



Hold a thank-a-thon: Gather club members for a session of writing thank-you notes to your club's donors from the past few years. (Donations are not limited to funds but can include space, supplies, food, etc.) In addition to expressing your appreciation, this gesture will keep your club in the minds of donors and partners and make it easier to solicit future donations.



IDEAS FOR ENGAGING THE COMMUNITY

Invite speakers to your club: Host representatives of local companies, professionals, and community activists and leaders. Having them discuss their area of expertise with your members will raise your club's profile among other community influencers and could lead to long-term partnerships. Also, notable speakers might attract new members.

Plan a project related to one of Rotary's areas of focus: For example, sponsor a food, clothing, or book drive; host a health and wellness fair; or fix up a community center or park. Service is at Rotary's core, so a service project highlights our values and the good work that we do.

Host a panel event: Panel discussions can showcase Rotary as a key influencer. Invite leaders to participate in a discussion about locally important issues. Speakers could include representatives from local organizations, academic or professional experts, politicians and civic leaders, and Rotarians. Tips for success: Include an interactive segment, and invite people who have a connection to the topic to have a booth or table at the event so that community members can get more information and network with them.



3

ASSESS YOUR RESOURCES

Once you've chosen the type of event you want to host, assess the resources available to carry it out. Consider time, money, materials, and people. Here's an example of a timeline and checklist for planning an event that's open to the community.

TIME FRAME	TASKS
<input data-bbox="165 562 233 632" type="checkbox"/> 24-18 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Identify the event's goals <input type="checkbox"/> Create an event plan that covers topic, audience, speakers, sponsors, promotional plan, venue, risk management <input type="checkbox"/> Build a team and assign roles <input type="checkbox"/> Contract with the event venue <input type="checkbox"/> Develop a budget <input type="checkbox"/> Review possible contingencies (e.g., for outdoor events, develop a plan in case of inclement weather) <input type="checkbox"/> Review insurance coverage for the event and contact your insurance provider <input type="checkbox"/> Get tax and legal advice; hosting exhibits, sponsoring events, or accepting sponsorships may have tax and legal consequences for your club <input type="checkbox"/> Develop a request for proposal to get vendor bids
<input data-bbox="165 1270 233 1339" type="checkbox"/> 18-12 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm speakers and rehearsal times <input type="checkbox"/> Find sponsors <input type="checkbox"/> Find exhibitors <input type="checkbox"/> Get vendor bids (for meeting and event services, graphics, printing, audiovisuals, catering, music, photography, security, etc.) <input type="checkbox"/> Analyze the bids and select service providers <input type="checkbox"/> Negotiate contracts, including payment terms and service delivery <input type="checkbox"/> Set deposit due dates <input type="checkbox"/> Develop a registration system; include a question about dietary restrictions if applicable <input type="checkbox"/> Obtain public performance licensing rights for music, etc. <input type="checkbox"/> Confirm entertainment and any rehearsal or sound check times

TIME FRAME	TASKS
18-12 weeks before (continued)	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm sponsors and exhibitors <input type="checkbox"/> Decide how and where you will promote your event <input type="checkbox"/> Inventory marketing materials: decide if any new ones are needed <input type="checkbox"/> Design promotional items: <ul style="list-style-type: none"> - Event sign-up page - Event posters - Fliers - Social media graphics - Email campaign - Videos - Other advertising materials - Materials for a Rotary booth at the event (banners, branded tablecloth, etc.) - Signs for the event space (photos, backdrop, banners, etc.)
12-8 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Send invitations <input type="checkbox"/> Deliver invitations and promotional materials to speakers and partners to distribute to their networks <input type="checkbox"/> Add information about the event on your club's website; explore other sites for promotion <input type="checkbox"/> Deliver promotional materials to others in your network <input type="checkbox"/> Draft a floor plan (include seating, registration area, attendee flow, exhibits, and food and beverage areas) <input type="checkbox"/> Draft a detailed schedule for the event, including setup, rehearsals, breaks, and run of show <input type="checkbox"/> Define volunteer assignments; note any special skills required
8-6 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> - Registration reminder - Latest program developments - Logistic information - Share with a friend <input type="checkbox"/> Start a phone campaign to key audience targets <input type="checkbox"/> Continue to distribute promotional materials <input type="checkbox"/> Recruit volunteers for specific assignments



TIME FRAME	TASKS
<div data-bbox="165 170 233 237" style="border: 1px solid black; width: 42px; height: 32px; margin-bottom: 10px;"></div> 6-4 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> - Registration reminder - Latest program developments - Logistic information - Share with a friend <input type="checkbox"/> Get speakers' presentations <input type="checkbox"/> Develop the presentation on Rotary and your club <input type="checkbox"/> Continue promoting the event <input type="checkbox"/> Select menus, if applicable <input type="checkbox"/> Train volunteers <input type="checkbox"/> Refine the floor plan <input type="checkbox"/> Refine the detailed schedule <input type="checkbox"/> Make a delivery and storage plan for event materials (e.g., printed materials, sponsor items, badges, displays, etc.) <input type="checkbox"/> Open event registration
<div data-bbox="165 1033 233 1100" style="border: 1px solid black; width: 42px; height: 32px; margin-bottom: 10px;"></div> 2 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> - Registration reminder - Latest program developments - Logistic information - Share with a friend <input type="checkbox"/> Finalize floor plan <input type="checkbox"/> Finalize the detailed schedule <input type="checkbox"/> Develop a detailed list of desired photos for the photographer <input type="checkbox"/> Reconfirm all speakers, vendors, and logistics <input type="checkbox"/> Give final floor plan and the detailed schedule to the event venue and key stakeholders

TIME FRAME	TASKS
<input data-bbox="167 170 233 237" type="checkbox"/> 1 week before	<input type="checkbox"/> Send email reminder to registered attendees <input type="checkbox"/> Rehearse the program with speakers <input type="checkbox"/> Determine last-minute vendor needs <input type="checkbox"/> Prepare goody bags, handouts, etc. <input type="checkbox"/> Contact media about the event <input type="checkbox"/> Provide guarantees to the event venue <input type="checkbox"/> Hold final meeting of planning committee with vendors to review all arrangements and timing
<input data-bbox="167 621 233 688" type="checkbox"/> 2 days before	<input type="checkbox"/> Send final email reminder to presenters and attendees <input type="checkbox"/> Continue to follow up with media contacts <input type="checkbox"/> Hold a final meeting with venue personnel to review the detailed schedule <input type="checkbox"/> Deliver all materials to the venue
Event day	<input type="checkbox"/> Set up signs, tables, program materials, etc. <input type="checkbox"/> Do a final review and walk-through of the event site <input type="checkbox"/> Perform audiovisual checks <input type="checkbox"/> Greet vendors and speakers <input type="checkbox"/> Assign someone to greet media representatives and introduce them to speakers and partners <input type="checkbox"/> Identify key people for photographer <input type="checkbox"/> Collect contact information from walk-in attendees for follow-up

4

BUILD ON YOUR EVENT'S SUCCESS

To maximize your event's long-term impact and make it easier to hold future events:



Send thank-you notes: Be sure to thank speakers, event partners, attendees, and volunteers.



Stay connected: Following up to say thank you is also a great opportunity to solicit opinions on the event. And remember to send periodic updates to those who expressed interest in Rotary, your club, or a project.



Pursue event coverage: Media can't always attend an event, so send materials about it afterward. Include photos and videos that highlight noteworthy speakers and attendees who are of interest to that media outlet. Don't forget that social media can be effective in amplifying event coverage, so post highlights of the event and any media coverage it received.



Tell us how it went: Email a summary of your event to pr@rotary.org. You can also share your event's success by visiting www.rotary.org/rotarystory and posting images or video. Add [#rotarystory](https://www.instagram.com/rotarystory) to a Facebook, Instagram, or Twitter post about your event. Spreading the word about your event will inspire Rotarians in other communities. Together, we can raise awareness of Rotary.



5

EVENT RESOURCES

A range of handy event resources are available on the **Brand Center**, **Rotary Shop**, and **My Rotary**:

OFFICIAL LOGOS



CLUB BROCHURE TEMPLATE



OTHER PROMOTIONAL RESOURCES:

- + Prospective member brochure
- + Discover Rotary presentation

ROTARY AND AREAS OF FOCUS ROLL-UP BANNERS



ADDITIONAL RESOURCES ON THE BRAND CENTER:

- + Newsletter, presentation, and letterhead templates
- + Thank-you card
- + Event promotion examples listed in the brand guidelines (posters, cards, digital assets)

? If you need help getting started, or get stuck planning, we're here to assist. Email pr@rotary.org.

