

Slide 3 notes:

What kind of clubs are here?

Clubs with Foundations

New clubs or new to fundraising

Clubs with 50+ members Clubs with 20-49 members Clubs with less than 20 members

Total club FR values (all venues, but not dues) less than \$5,000 - \$50,000 to \$5,000 - \$50,000+

What is your level of expertise?

Novice – just learning

Intermediate – several events over the years

Advanced – MANY years with many events

Expert – you do this for a living!

Why are you here?

10 statements other than 'learn about FR' (unique answers please)

what's the specific problem with your club

Experience – LIFE TIME! - Sold booster banquet tickets in HS – Habitat for Humanity – Women built house in 2001 & women build trip to Cluj Romania in 2007 and Women's transitional housing

Philosophy – Fundraising is a sales transaction – nonprofit needs the money or services, so what does the donor want in exchange – I don't "ASK" for money, rather I "offer" people the opportunity to give.

Style – University professor, so pardon the 'lecture', but enjoy the 'class' participation style at the end. Please hold questions to end of presentation so I don't get off track. I plan to direct the presentation to information collected from the audience. On occasion, I'll read my notes so I won't derail myself by going off on a tangent.

I'm a bit of a country girl that focuses on relationships and uses casual or layman's terms. If necessary, I can use \$5 words.

Slide 4:

Tax deductions: Funds to a foundation – funds in excess of retail value – NOT funds where goods or services were received

Pass Through: Org that collects funds from community/corp. and passes on / through the funds to charitable nonprofits. NOTE: Problem when soliciting funds from organizations like banks and companies who have their charitable dollars already designated to same charities as Zonta – of course they prefer to give direct to a ‘program’.

Program: Domestic violence where an org provides services to clients is Program – Zonta creates a “Program” with community education, awareness, and advocacy such as a forum or community speaker

Grant: Zonta can write grants for “Program” funds for a foundation qualified 501-c-3 – NOT for passing through money to other charitable organizations – A request for sponsorship is considered a proposal.

Sponsorships: Sponsorships from corporations are more closely related to ‘advertising’ dollars – the desire of the company is for community recognition of support with logos, signs, banners displayed at events, e.g. auction tables, etc. A good example of the ‘sales’ exchange or quid pro quo. If your organization has a foundation, the sponsor may be able to spend benevolent dollars, otherwise the funds come from community goodwill or advertising dollars

Slide 5:

Identify:

Develop a clear, cohesive organizational identity - this supports the goals of raising money and increases visibility - making it easier to express the organization's mission effectively and consistently – Yes, we have the Zonta mission, but what is your local club's identity (service, social, educational, advocacy, fundraisers, etc) Remember focus groups - Conduct smart outreach

Analyze Resources:

Internal – talent and businesses within the club – facilities, funding, youth, and other volunteers

External – natural resources, community culture, corporate friends, other clubs for partnerships, etc.

Analyze FR History:

Look at past experience. What worked? What didn't?

Criteria: Funds raised, expense, net profit - Number of people needed - People hours invested - Cultivation value

Analyze Budget and Goals:

How much money are you raising and why?

Motivates members - Gives something concrete for goals - Allows you to communicate clearly with donors - Inspires donors to give

Prioritize:

Values of your club – what's important – what's the minimum?

Match up:

Know what is doable – a great small success is much better than a grand failure which leaves you with more expenses than profit

Diversify: Different opportunities for different audiences – not everyone likes an event

Slide 6:

Timeline: Know your community and competition when assigning dates

Budget: A budget is more than funds, as it includes volunteer hours and committee meetings. Industry average is up to 25% of gross is allowable for expenses, but most Zontians operate well below 25% and consider most FR to be 'self-funded' or rather the gate price covers the expenses.

Committee: Personally, I don't believe in co-chairs. If you have to promise only 'half' a job to get someone to sign up for 'co-chair' then it's all off to a bad start already. I highly recommend a primary chair or Project Manager (PM) with a 'second' in command who is being groomed to take on the primary position the next year. Go with sub-committees and have job descriptions.

FR Vehicle:

In order for your fund raising event to be successful, choose a specific type of activity. This will correspond to the goals that you have.

Worksheet/list of event types is an additional handout.

Execute:

Slide 7:

BIG: Rose Parade in Pasadena, or Portland, OR. National or regional events sponsored by Zonta, such as bringing in a major speaker, celebrity, or concert with universal appeal. Susan Sarandon has been a major boost for Heifer International, Willie Nelson for farmers, Brad and Angelina for New Orleans.

Example of 'big' is: <http://www.crowdrise.com/raiseforwomen> where we placed 2nd with \$130,436. A partnership or sponsored by Skoll Foundation and Half the Sky Movement

Partnerships – collaborations:

Collaborating with Other Organizations - Each organization has its own fund-raising committee - Form joint fund-raising committee representing each organization - Each group develops and submits fundraising plan to committee

Committee:

Coordinates fund-raising efforts of all groups

Reviews all plans for overlap.

Ensures that prospects are not approached more than once.

Obtains affiliate approval

Communicates regularly with partner affiliate

Coordinates collaborative efforts

Formulate joint case

Fundraising strategies

Sponsorships – Who can promote Zonta nationally like Coldwater Creek and New Balance promotes for Susan G Komen? How many university presidents are Zontians? Locally, is there a company that would be a primary promoter for Zonta?

Area-District Wide: Similar to all the above that is bigger than an individual club that provides strength in numbers.

Slide 8:

Signature Event

Auctions, Murder Mystery, Golf Tournament, etc.

This money is redistributed

Secondary Event

Tea, Holiday Event, Skeet Shoot, Bunko, etc.

Create something from nothing – purse and jewelry auction from donations

This money can be donated or some used for operations

In-Kind Sponsored Gift

TV or Radio ads, printing, facility space, etc.

This is partnership and bookkeeping 'income'

Retail Sales

Calendars, Shirts, Fudge, Pins / Pens, Jewelry, etc.

This money can be donated or some used for operations

Third Party

Events that benefit your club, but not operated by your club: Real Estate office /bank – Just Book it! is a private FR event

This money is redistributed

Scholarship Funding

Solicit schools, dentists, doctors, professional schools, etc. for distribution

This is similar to in-kind FR and very much 'out side the box'

Passive Income

GoodSearch, Happy \$'s, Meeting Raffles, etc.

These are operations funds

Sponsor Funded Service or Advocacy Event

Forums, Birthing Kits, Community Speaker, etc.

These events could qualify as 'program' and are clearly charitable dollars for budgeting purposes

Partnerships

Similar to In-Kind and Scholarship where co-branding is possible

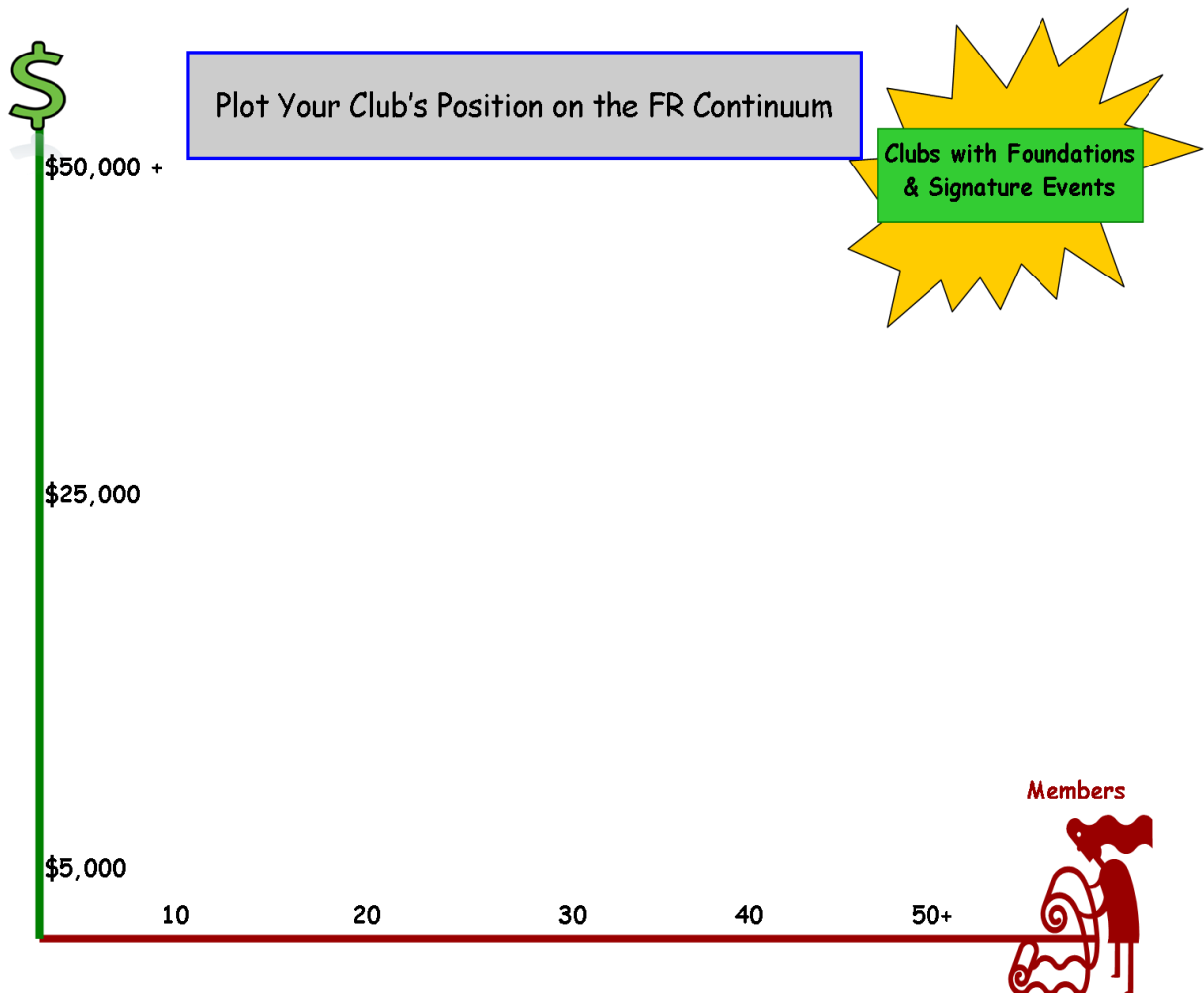
May or may not generate funds for charity, rather serve as PR and community goodwill

Tools, charts, and outlines for your club to print off and have a workshop:

Slide 9:

Tools, charts, and outlines for your club to print off and have a workshop:

Slide 10:



Tools, charts, and outlines for your club to print off and have a workshop:

Slide 11:

<i>Funding Method</i>	Signature FR	Secondary Event	Private / Other Events	Passive Income
<i>Funding Goals</i>				
ZIF				
Scholarships				
Local Charities				
Operations				
Service Projects				

Tools, charts, and outlines for your club to print off and have a workshop: Slide 12:

Bonus sheet for working with your club members.

<p>1. Develop a strong case statement.</p> <p>To build a strong case statement, you must answer the following questions:</p> <ul style="list-style-type: none">• Why does your agency exist? What is your mission?• What are the specific problems in society that you plan to address?• Who will benefit from your work?• What methods will you use to alleviate these problems?• Do you have a track record of accomplishment?• How qualified are your board, staff, volunteers, and community alliances to tackle these problems?• What resources are needed to advance your efforts?• How will you raise the needed funds? <p>2. Research to find out how much you need to raise (budget).</p> <p>3. Determine the best ways to fund your organization</p> <p>4. Decide whom to approach and how you'll approach them (fundraising plan)</p> <p>Create a Fundraising Plan</p> <ul style="list-style-type: none">• Set Realistic Fundraising Goals• Diversify Funding Mix• Put together a fundraising plan and timetable• Evaluate your efforts to plan for future years <p>Types of Funding Opportunities</p> <p>See Fundraising Vehicle Handout.</p>	<p>Notes:</p>
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Slide 13:

Instruct attendees to make notes on their handouts to identify and record new possibilities.

Give groups 15 minutes to discuss (groups of approximately 7)

Give groups 15 minutes to present (approximately 8 groups at 2 minutes each)

Last 10 minutes are for group Q&A

- Discuss the following within your group and choose only one answer to each question to report to the audience:
 1. Share your most successful fundraiser and how much you raised.
 2. What are your challenges?
 3. What is the most unique fundraiser in your group?
 4. Identify a successful community Partnership.
 5. Identify a successful Sponsorship.
 6. What's 'going to the next level' look like?