



PLAN A STRATEGY

to Take Zonta Fundraising to a New Level

Presented by: Dr. Jean Ann French

AGENDA

- Introduction of Session
- Fundraising Base Line
- Adopting a Strategy
- Taking ACTION
- Going to the Next Level
- Group Participation & Discussion

INTRODUCTION OF SESSION

- Introduction of YOU – the audience
 - Shapes & Sizes of Zonta Clubs
 - Age of Clubs
 - Your level of FR expertise
 - Why are you here?
- Introduction of Jean Ann
 - Experience
 - Philosophy
 - Style

FUNDRAISING BASE LINE

- What donated funds are eligible for a tax deduction?
- What is a 'pass through' organization?
- What constitutes a "Program" for a nonprofit?
- Can a Zonta Club write a grant?
- How do sponsorships work?

ADOPTING A STRATEGY

- Steps to creating your strategy for your club
 - Identify who you are and want to be in your community
 - Analyze your resources – internal and external
 - Analyze fundraising history
 - Analyze your budget and goals
 - Prioritize goals and objectives
 - Match your resources to goals
 - Diversify method and audience
 - Set 2 year plan

TAKING ACTION

- Create annual timeline(s)
- Create budgets
- Create committee(s) structure
- Create fundraising vehicle plan

Signature Event	Retail Sales	Passive Income
Secondary Event	Third Party	Sponsor Funded Event
In-Kind Gift	Scholarship Funding	Partnerships

- Execute

GOING TO THE NEXT LEVEL

- Think BIG
- Think Partnerships
- Think Sponsorships
- Think Area-District Wide



Fixing the FR Vehicle!



<u>Signature Event</u> Auctions, Murder Mystery, Golf Tournament, etc.	<u>Retail Sales</u> Calendars, Shirts, Fudge, Pins / Pens, Jewelry, etc.	<u>Passive Income</u> GoodSearch, Happy \$'s, Meeting Raffles, etc.
<u>Secondary Event</u> Tea, Holiday Event, Skeet Shoot, Bunko, etc.	<u>Third Party</u> Events that benefit your club, but not operated by your club: Banks, offices or Just Book it!	<u>Sponsor Funded Service or Advocacy Event</u> Forums, Birthing Kits, Community Speaker, etc.
<u>In-Kind Sponsored Gift</u> TV or Radio ads, printing, facility space, etc.	<u>Scholarship Funding</u> Solicit schools, dentists, doctors, professional schools, etc. for distribution	<u>Partnerships</u> Similar to In-Kind and Scholarship where co-branding is possible

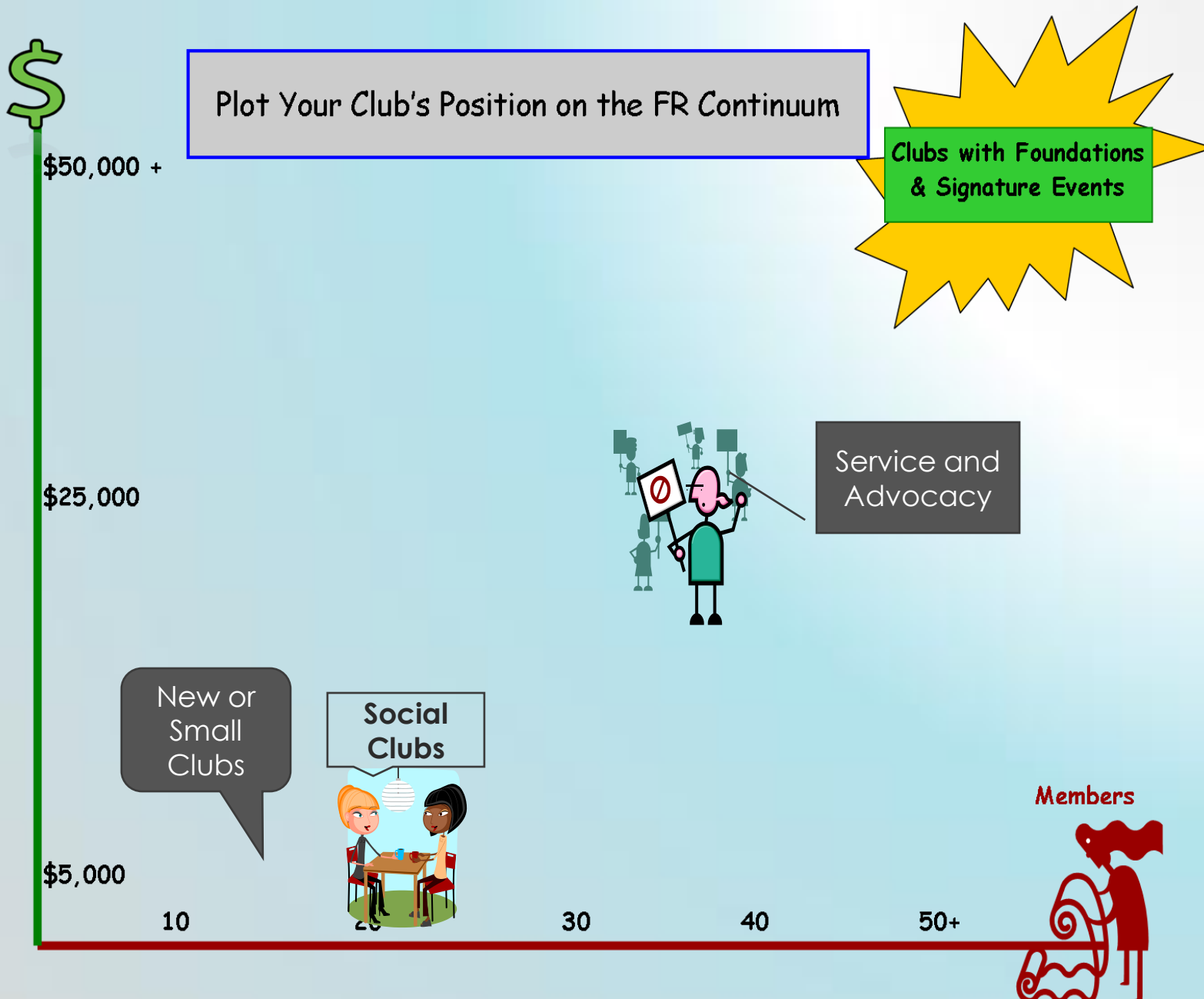
Identify Your Club Type

Advocates

Fundraisers

Social Group

Service



FUNDING GOALS & METHODS WORKSHEET

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

Basic Steps to Raising Funds:

1. Develop a strong case statement.

To build a strong case statement, you must answer the following questions:

- 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?

2. Research to find out how much you need to raise (budget).

3. Determine the best ways to fund your organization

4. Decide whom to approach and how you'll approach them (fundraising plan)

Create a Fundraising Plan

- Set Realistic Fundraising Goals
- Diversify Funding Mix
- Put together a fundraising plan and timetable
- Evaluate your efforts to plan for future years

Types of Funding Opportunities

See Fundraising Vehicle Handout.

Notes:

WORK GROUP QUESTIONS

- 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?
- Group spokesperson presents answers to audience concisely.