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!

think BIG
dream 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 achieve in the past.

• **Achievable** – A realistic goal is based on a realistic assessment of materials, resources and time.

• **Measurable** – A goals 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