



Rotary Club of Oak Bay Preferred Practices For Fundraising Events

An important note for the users

The attached Preferred Practices are written to enhance, and in some respects to standardize, various key activities in our club. They should be treated and used more as guidelines than as a rigid set of rules and regulations. In no way should independent thought and initiative be curbed as a result of adopting the Preferred Practices.

Please remember that Preferred Practices stem from our Club's combined experience in organizing activities efficiently and smoothly. If there is a doubt that a particular Preferred Practice is impractical, or it is non-functional due to a particular set of circumstances, please bring it to the attention of the person responsible for Knowledge Management or the Club President or any Board Member.

It is emphasized that this document merely gives guidelines to committee chairs and other Rotarians, and neither the Rotary Club of Oak Bay nor the persons who have written this document will be held liable in any event.

**Rotary Club of Oak Bay
Preferred Practices for Fundraising Events**

KEY FUNCTION OF THE FUNDRAISING COMMITTEE

To raise funds for the Rotary Club of Oak Bay by holding public events such as a concert, an annual dinner or dance or an auction or a barbeque (rib fest), but not limited to the foregoing.

AIM OF THIS DOCUMENT

To provide guidance to the future fund-raising events committee Chairpersons in the organization of sub-committees, the organization of events, the timing and nature of solicitations for donations, and the nature of the risks faced by the committee and the club as a whole.

PREFERRED PRACTICES FOR THE FUNDRAISING COMMITTEE

1. Once a project is approved by the Board, the Fundraising Committee should be struck at least five to six months prior to the event. This committee should meet at least twice a month in the first three to four months and weekly during the month leading to the event.
2. Although the preparation of the budget is the responsibility of the Fundraising Committee, the Directors should be aware of, and approve where the proceeds of the fundraising are to be disbursed.
3. The committee should consists of an Executive Committee and other sub-committees such as Ticket Sales, Donations, Publicity, Venue/Food Services, Finance, PR/Decorations, Multi-media/ Sound and Lighting, Room Decorations, Auction (if there is an auction attached to the event). One person should be responsible for each sub-committee and report regularly to the Executive Committee.
4. Requests for donations of cash and kind, matching funding, restaurant gift certificates etc., should begin at least five months prior to the event.
5. Four months prior to the event, committee members report to the club members at large on their various functions and needs on a weekly basis.
6. Two months prior to an event, brochures, tickets and other publicity materials should be printed and circulated to Rotarians and friends. For events such as a dinner, tables for 8 or 10 persons are sold to friends or to corporations.

7. All contracts for the venue, meals and entertainment are signed as early as possible. Committee members are advised to refer to Appendix 1 - Risk Management for potential risks in organizing events.
8. One month prior to the event the Executive Committee should meet at least once a week to ensure that all activities are proceeding smoothly and take corrective actions as needed.
9. A wrap-up meeting should be held within two weeks after the completion of an event to discuss highlights and snags that were encountered and write a brief report for future committees of a similar event.
10. Thank you letters should be sent to all donors within two weeks of the completion of the event.
11. All correspondence, solicitations and thank you letters should be on Club letterhead and individually signed either by the Club President or the Event Chairperson.

SOME MISTAKES TO AVOID

1. “Last minute” approach to planning, preparation, and solicitation of donations.
2. Expectation that sub-committees have, or will have completed their duties in a timely manner. Regular monitoring is recommended.
3. Sending mass letters seeking donations.
4. Failure to send thank you letters in time after the event. (Letters thanking all persons and/or organizations must be sent out within two weeks of the completion of the event).

Please Note: All letters seeking donations to an event and letters of thanks MUST be on Club’s letterhead and addressed to a key person. Each letter must be individually signed either by the Club President or the Event Chairperson.

RISK MANAGEMENT

ALL committee members and **ANY** person(s) involved with fundraising events must acquaint themselves with Risk Management given in Appendix 1 of this Preferred Practice document. Potential risks should be discussed and, if deemed necessary, brought forward to the Board’s attention.

This Preferred Practice is compiled by: Perry Bamji, Joan Firkins, Peter Lawrie and Joan Peggs

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Revised By: Perry Bamji

Date :July 2011

Appendix 1

Risk Management for the Fund-Raising Committee

(Taken from Rotary Club of Kingston, Risk Management First Edition: June 2002, Appendix F4)

1. Parties Involved

Rotary, Property Owner, Food and Beverage Vendors and Attendants

2. Potential Claimants

A. Claims by Attendees

Attendees may claim compensation for personal injury or financial loss or damages arising from:

1. Falling or falling objects, etc.
2. Food poisoning
3. Gas or propane explosion of Vendor's equipment
4. Car damage in parking lot
5. Misrepresentation as to item purchased in an auction
6. Failure to deliver future item purchased at Auction – e.g. group tour later cancelled by tour operator

B. Claims by the Property Owner

The property owner where the event is held may claim for compensation for financial loss or damages arising from:

1. Non-payment of any charges for use of property or breach by Rotary of any other terms of contract/arrangement
2. Claims against it by any other Party
3. Claims arising due to postponement of an event for any reason

C. Claims by Refreshment Vendors

The refreshment vendors may claim for compensation for personal injury or financial loss or damages arising from:

1. Falling or falling objects, etc.
2. Faulty electrical supply, etc.
3. Claims arising due to postponement of an event for any reason

4. Ranking of Potential Risks

Based on the probability (high, medium, low) of any one of these risks actually occurring and the severity (high, medium and low) of the consequences to Rotary if it does occur, the following risks have been ranked. The risks are given in a descending order of priority, along with the risk number and certain control procedures are given:

1. Item A1, **Claims by Attendants and Vendors for injury from falling etc.**
 - Check in advance that property owner has public liability insurance
2. Item A2 **Claim for food poisoning**
 - Use only reputable experienced Vendors
 - Check in advance that the Vendor has appropriate liability insurance coverage
3. Item A6 **Claim for failure to deliver at future date item purchased at auction**
 - Accept risk for amount equal to 10% of anticipated total profit and after that consider special insurance coverage.
 - Use appropriate disclaimers in brochures and catalogues and articulate conditions or restrictions.
 - Use only professional auctioneer(s).
4. Item A4 **Claim for parked car damage**
 - Responsibility of car owner and automobile insurance policy
5. Item A3 **Claim resulting from Vendor's faulty gas or propane equipment**
 - Use only reputable experienced Vendors
 - Check in advance Vendor's insurance coverage and possibly purchasing own special event insurance
6. Item A5 **Claim for misrepresentation or sale of faulty goods (e.g. barbecue, lawnmower etc.)**

- Use an auctioneer disclaimer
- Use only professional auctioneer(s)

7. Item B2 **Claim by property owner for any claims brought against it**
8. Item B1 **Claim by Property Owner for failure of Rotary to fulfil its obligations**