

# A FOUNDATION FOR THE FUTURE



# Agenda

- Welcome
- Brief Grants Overview
- SHARE System
- Fundraising
- TRF Forms & Reports



# Rotary Foundation Mission

The Rotary Foundation mission is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.



# Areas of Focus

1. Peace and Conflict Prevention/Resolution
2. Disease Prevention and Treatment
3. Water and Sanitation
4. Maternal and Child Health
5. Basic Education and Literacy
6. Economic and Community Development



# Grant Names

Rotary Foundation  
District Grants

Rotary Foundation  
Global Grants



# Rotary Foundation District Grants

- Initiated by clubs and district
- Follows TRF Mission, preferably within the six areas of focus
- Preference for International projects in developing countries
- Local and DDF funding only, no World Fund match
- Up to \$4,000 grant, club matches \$ for \$
- One grant per club, but clubs can work together on a project



# Rotary Foundation Global Grants

- Follows the TRF Mission and six areas of focus
- Larger, long-term, sustainable projects
- Initiated by qualified club and/or district
- Must be with Pilot Districts
- DDF, World Fund, cash flow through, PF earnings, named gifts
- Minimum TRF grant of \$15,000
- Streamlined stewardship and accountability



# District Organization

- District Foundation Chair
  - District Grants Chair
    - Global Grants (includes VTTs, Scholars)
    - District Grants
  - District Fundraising Chair
  - District PolioPlus Chair
  - Foundation Mentors





# Qualification

- Clubs and districts must be qualified to receive Rotary Foundation funds
- Ensures proper legal, financial, and stewardship controls of grants
- Qualification process is simple
  - Attend Grants Management Seminar
  - Sign the Memo of Understanding



# Fundraising for The Rotary Foundation



# Why Give to The Rotary Foundation?

- TRF Mission
- Helps fund international and community projects
- Maximizes the use of donations
- We are Rotarians
- 
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# How to Encourage Giving

- Club Programs
  - Ambassadorial Scholars
  - Vocational Training Teams
  - Foundation Committee
  - Foundation Mentors
  - Foundation Alumni
  - Global Grants Participants
- Participation
  - Become a Host Counselor for a Scholar
  - Join a Vocational Training Team
  - Create or participate in a Global Grant
- Matching Points
- Raffle Tickets
- Foundation Seminar



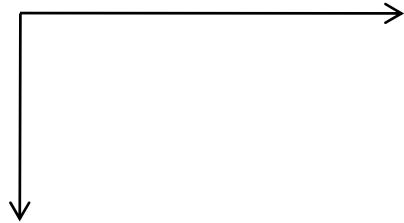
# Fundraising Overview

- Club Goals
  - Annual Program Fund
    - \$347,200 (\$117 per capita) so far
  - **Every Rotarian Every Year\***
  - \$200 Million Challenge\*
    - \$111,000 so far

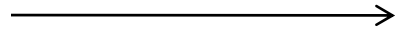


# SHARE System

APF Member donations



TRF Permanent Fund earnings



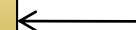
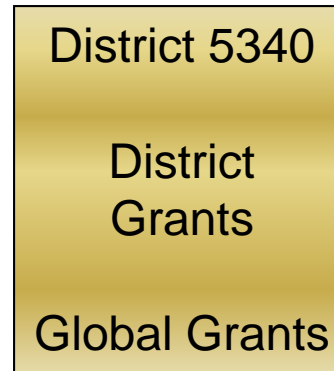
The Rotary Foundation



Three years pass

50% ↓

50% ↓



# Ways to Give

- Automatic Withdrawal
  - Credit Card
  - Bank Account
- Member Access
- Checks
- Stock Transfers
- Asset Transfers



# Automatic Payment

- Easiest of all
- One-time application
- Bank account withdrawals best
- Credit Card account withdrawals require renewals periodically, but you don't get miles!
- APF or \$200 Million Challenge
- TRF-Direct Form





# Member Access

- One time donation (or multiple! 😊)
- Credit card (miles!)
- Member can track their own giving
- Annual Programs Fund, \$200 Million Challenge or Permanent Fund
- Member Access:



# Checks

- Club Foundation Chair collects checks
- Completes the appropriate form
- Member Access:
- Mails checks and forms to TRF
- Tracks for correct application of funds
- Can be for APF, \$200 Million Challenge or Global Grant



# Stock Transfers

- Great way to get rid of stock with low cost basis
- Simple form
- Handled by broker
- Note to TRF with instructions on where to apply
- Stock Transfer Form



# Asset Transfers

- Can transfer most tangible assets
- Contact Permanent Fund Chairs, DGND Dick Stevens or Adam Rosenberg
- Multiple ways to give: Charitable Remainder Trusts, Donor Advised Funds, etc.



# Practice Time!

- Read the exercise
- Select the correct form
- Complete the form
- Check your work



# Exercise #1

- You have received a check for \$150 from Rotarian Paul Harris. He wants it to go to the Annual Programs Fund. This gift will qualify him for his first Paul Harris Fellowship.
- Complete the correct form.
- Your club number is 12345, Paul's Rotary ID number is 190501 and your District is 5340.



# Exercise #2

- You have received 8 \$150 checks from 8 club members who all want their money to go back for Global Grant 78105. You can be creative with their names and ID numbers. The club number is 12345 and the District is 5340.
- Complete the correct form.



# Exercise #3

- The Club President wants to use some recognition points of their own to honor the Educator of the Year with a Paul Harris Fellowship. You can be creative with the names.
- Complete the correct form.





# Exercise #4

- The club is ready to send back their \$2,000 donation for PolioPlus. The club number is 12345 and the District is 5340.
- Complete the correct form.



# Where do I get help?

- Experienced Club Members
- Your Foundation Mentor
- District Foundation Committee
- Areas of Focus Subject Matter Experts
- The Rotary Foundation Staff



# Closing

- Questions?
- Thank You

