

2013 ROTARY FOUNDATION FUNDRAISING MANUAL
ROTARY DISTRICT 5340



ROTARY DISTRICT 5340

**DISTRICT ROTARY FOUNDATION
COMMITTEE**

**ROTARY FOUNDATION FUNDRAISING
SUBCOMMITTEE**

**2013 ROTARY FOUNDATION FUNDRAISING
MANUAL**



*District Rotary Foundation Committee
Rotary Foundation Fundraising Subcommittee
Three Year Strategy*

Enhance the culture of giving within every club

**Encourage every club to attain 100% Every Rotarian Every
Year Club status**

**Encourage every club to attain 100% Sustaining Member
Club status**

**Encourage every club to attain 100% Paul Harris Fellow
Club status**

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STRUCTURE/DUTIES

COMMITTEE: Stan Hartman & Bob Franz Co-Chairs

There will be 10 members of the committee referred to as Regional Foundation Fundraising Representatives. The district will be broken down into 10 groups of clubs (see attached) for which there will be a Regional Foundation Fundraising Representative assigned.

Description of duties of each Regional Foundation Fund Raising Representative is as follows:

Regional Foundation Representative – Fundraising

The 10 RFRFs are members of the Rotary Foundation Fundraising Subcommittee, chaired by Stan Hartman and co-chaired by Bob Franz.

Each RFRF represents a region (about 8-10 clubs) of our district. Some of the RFRFs could also serve as specialists with the committee – for example, Annual Fund Chair, Permanent Fund Chair, Paul Harris Society Chair – although these specialist roles could be additional members of the Rotary Foundation Fundraising Subcommittee.

Responsibilities

1. Meet with the Rotary Foundation Fundraising Subcommittee Chair and other committee members on a regular basis to coordinate efforts and plan activities. These meetings may be monthly and usually by prearranged conference call.
2. Meet with the Rotary Foundation Chairs of clubs in their region on a regular basis to discuss progress, resolve issues, and provide encouragement, share best practices. These meeting may be monthly and usually by prearranged conference call.
3. Assist the chair and committee in preparing messaging, planning strategy and tactics, preparing presentation material for the clubs, assisting with foundation training and seminar events.
4. As requested by clubs, be available for special foundation programs in the clubs.
5. As needed, provide one-on-one assistance and encouragement to a club foundation chair and/or club president.
6. Be familiar with all TRF literature and training materials that support fundraising.
7. Be familiar with and utilize special fundraising resources like Mike Dunlap, Steven Solomon, etc.
8. Be alert for special opportunities to educate, motivate, and encourage Rotarians to support TRF financially.
9. Treat all personal information with complete confidentiality.
10. Become a local expert to the clubs.

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2013 Rotary Foundation Fundraising Committee Subcommittee

Chair – Stan Hartman

Co-Chair – Bob Franz

North Inland

Bonsall

Escondido

Escondido After Five

Escondido East

Escondido Sunrise

Fallbrook

Bob Franz (also committee Co-Chair)

Fallbrook Village

San Marcos

Shadowridge (Vista)

Valley Center

Vista

Central Inland

Convoy-San Diego

Poway

Ramona

Rancho Bernardo (San Diego)

Rancho Bernardo Sunrise (San Diego)

Nasrin Barbee & Jeanne MacLaren

San Diego North

North Coastal

Carlsbad

Carlsbad Hi-Noon

El Camino Real (Oceanside)

Encinitas

Encinitas Coastal

Marla Elliott

Oceanside

San Luis Rey (Oceanside)

Solana Beach ECO (Provisional)

Central Coastal

Del Mar

Del Mar-Solana Beach Sunrise

Susan Hennenfent

La Jolla

La Jolla Golden Triangle

La Jolla Sunrise

Mission Bay (San Diego)

Rancho Santa Fe

San Diego Coastal

Torrey Pines (La Jolla)

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Large Club

San Diego

Stan Hartman (also Committee Co Chair)

Downtown

Coronado

Coronado Binacional

Mission Valley (San Diego)

Mission Valley Sunset

Old Mission (San Diego)

Point Loma (San Diego)

San Diego Downtown Breakfast

San Diego Uptown Sunrise

Mike Whitehurst

East

El Cajon

El Cajon Sunset

La Mesa

La Mesa Sunrise

Lemon Grove

Rancho San Diego/Spring Valley

Santee-Lakeside

Bill Stumbaugh

South

Chula Vista

Chula Vista Sunrise

Chula Vista Sunset

National City

San Diego Paradise Valley

Southeast San Diego

Sydney Stewart

Desert

Blythe

Borrego Springs

Brawley

Calexico

El Centro

Holtville

Imperial (Valley Breakfast)

Sylvana Meeks

Military

Camp Pendleton

Miramar (San Diego)

E-Club of the United Services, San Diego

Naval Base San Diego

Amanda Wirtz

Special Positions

Annual Funds Chair

Endowment Fund Chair

Paul Harris Society Chair

Bob Franz

Dick Thorn

Christine Evans

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DEVELOP A CULTURE OF ANNUAL GIVING

Our job is to assist the Foundation Chairs and their Committee of each club to develop a Culture of Annual Giving. This can be accomplished in a multitude of ways.

1. Contact the President Elect of each of the Clubs assigned to you to assist them in developing their fundraising goals for the year – which are due to the District Governor Elect by May 15th
2. Provide a copy of their giving history (which are included in your manual under the appendix)
3. Encourage the club to at least monthly have a short presentation on The Rotary Foundation and how it works for their Community as well as internationally. We will provide examples of the work done by the Rotary Foundation to you all for their use.
4. Work with the Rotary Foundation Chair to assist them in developing goals for EREY, Sustaining Members, and Paul Harris Society
5. See appendix for other types of giving opportunities which we can assist with through others on the Rotary Foundation Fundraising Subcommittee.

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Encourage EVERY ROTARIAN EVERY YEAR

Work with each Rotary Foundation Chair to encourage EVERY Rotarian in their club to contribute some amount to the Annual Fund EVERY YEAR.



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Encourage 100% SUSTAINING MEMBERS

Work with each foundation chair to encourage them to set a goal to have 100% of their club contribute at least \$100 each and every year to the Annual Fund to qualify the club for a 100% Sustaining Member award.



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Encourage 100% PAUL HARRIS MEMBERS

Assist the Foundation Chair and President in setting a goal in their club for Paul Harris membership. Provide the data for them to review with you for those members that are close to their Paul Harris Award and suggest ways that they can encourage them to take that next step.



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DISTRICT ROTARY FOUNDATION COMMITTEE MANUAL

Rotary Foundation activities would not be possible without the financial support of Rotarians and friends. Giving to The Rotary Foundation is now easier than ever. The online system at www.rotary.org has been updated and simplified, and now accepts one-time and recurring contributions in multiple currencies. Giving online is more efficient, cost effective, and secure. Go to www.rotary.org/en/contribute.

Duties of the District Fundraising Subcommittee of the Foundation Committee. The committee oversees the district's fundraising strategy and helps clubs set and achieve their contribution goals for the **Annual Fund**, the Permanent Fund, and the PolioPlus Fund.

Annual Fund

The Annual Fund is the primary source of support for Foundation grants and programs each year. As district Rotary Foundation committee members, you are asked to promote recurring annual contributions to The Rotary Foundation through the Every Rotarian, Every Year initiative (**our goal is to get \$100 a year each year from all of our members**), which encourages every Rotarian to participate in a Foundation project and contribute to the Foundation's Annual Fund every year. By encouraging every Rotarian to make an annual contribution, the committee

- »» Promotes the Foundation's many successes
- »» Supports the local and international service projects developed by Rotarians
- »» Educates Rotarians on the Foundation's operations
- »» Motivates Rotarians to participate in Foundation activities

Annual Fund gifts can be directed to SHARE, the World Fund, or an area of focus fund. All options are available for one-time or recurring contributions.

SHARE is the primary source of funding for Rotary Foundation programs. It is also the only Annual Fund designation that generates funding for the District Designated Fund. Rotary districts use DDF to pay for the Foundation activities in which the clubs and district choose to participate.

World Fund contributions provide the Foundation's portion of funding for approved grants and other program support. The Trustees manage these funds and make them available for packaged grants and the matching portion of global grants.

Areas of focus contributions provide the Foundation's portion of funding for activities addressing critical humanitarian issues and needs. Annual Fund contributions directed to

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any of the six areas of focus are included toward a club's annual giving goal and per capita calculations. They also are eligible for all Annual Fund recognition opportunities (Every Rotarian, Every Year; Rotary Foundation Sustaining Member; Paul Harris Fellow; Paul Harris Society; Major Donor; and Arch C. Klumph Society) and count toward all club recognition opportunities. **Area of focus-designated contributions are not included in a district's SHARE calculation and do not generate DDF.**

Because Annual Fund-SHARE contributions are the primary source of funding for Foundation programs, SHARE-designated contributions from every Rotarian, every year remain crucial.

Permanent Fund

The Permanent Fund is the Foundation's endowed fund. Gifts are never spent.

Contributions

to the Permanent Fund are invested to preserve and grow the principle, only a portion of the earnings generated are used currently to support Foundation activities supporting Rotary's highest priorities, including global and packaged grants and the Rotary Peace Centers. The Foundation has set a goal of US\$1 billion in Permanent Fund assets by 2025, ensuring the Foundation has the ability to meet future needs. Contributions to the Permanent Fund often take the form of major outright gifts, such as endowed funds, bequests, or life-income agreements. Because contributions to the Permanent Fund can be complex, subcommittee members should work closely with your regional Rotary Foundation coordinator.

PolioPlus Fund

Money that is contributed to the PolioPlus Fund is used solely for the purpose of achieving the worldwide eradication of polio, and funds will be needed until that goal is achieved.

Rotarians are encouraged to continue contributing to the PolioPlus Fund until worldwide polio eradication is certified.

Fundraising Goals

District fundraising goals for the year are the compilation of club goals submitted to The Rotary Foundation. District governors-elect collect club goals at the president select training seminar and forward them to The Rotary Foundation by June 1 each year. Clubs are asked to set goals for the Annual Fund and the Permanent Fund. The district Rotary Foundation Fund Raising Committee should work with clubs to determine challenging but achievable club goals. For 2013-14 fundraising goals, an online tool will be available in Member Access.

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Start by asking clubs what they want to do in three years using District Designated Funds. Use these participation goals to determine how much the district must raise. Track achievement of fundraising goals throughout the year. Consider using the recommended benchmarks below:

30 September 25%

31 December 50%

31 March 75%

30 June 100%

*Based on Rotary year (1 July-30 June)

Monthly contribution reports and EREY eligibility reports are available on Member Access, including assistance on reading these reports. The district should help clubs set the following goals:

»» Reaching US\$100 per capita. If the district is already at \$100 per capita, consider a percentage increase. If the district is less than \$100 per capita, consider ways to reach the \$100 level.

»» Increasing the number of Rotary Foundation Sustaining Members, Paul Harris Fellows, Benefactors, or Bequest Society members.

»» Planning at least one public fundraiser in support of Rotary's polio eradication efforts or one of the areas of focus.

»» Identify, cultivate, and solicit a specific number of potential donors capable of contributing major gifts of \$10,000 or more.

Goals may be stated as a monetary amount or by participation, such as:

»» 100% club participation

»» Establishing a Paul Harris Society

»» Number of new major gifts

»» Number of new Benefactors

»» Number of new Bequest Society members

Fundraising Initiatives

The Rotary Foundation has three major fundraising campaigns. Each campaign is unique and should be targeted to different donors depending on their interests and financial resources.

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Fundraising Initiative	Fund/Program	Purpose	Goal (\$US\$)	Date of Completion
Every Rotarian, Every Year	Annual Fund	Provides ongoing support today	Determined annually in June	30 June annually
Permanent Fund Initiative	Permanent Fund	Helps secure Rotary's response to the pressing needs of tomorrow	\$1 billion	2025
Rotary Peace Centers Major Gifts Initiative	Rotary Peace Centers	Creates an endowed fund for the Rotary Peace Centers program	\$95 million	2015

The Rotary Foundation recognizes that fundraising approaches must be appropriate to the customs and culture of the countries involved. Please adapt the following suggested

types of gifts and commitments as needed. Fundraising on behalf of The Rotary Foundation is most successful when conducted person to person. The Foundation belongs to all Rotarians and every Rotarian should have the opportunity to support its grants and programs.

Types of Giving Opportunities

Donors can choose from a variety of contribution options. Every donor is unique, so take the time to cultivate prospective donors and to help them determine the option that works best.

Naming Opportunities

Term Gift

A term gift is established for a specific program and is spent in its entirety within a short period of time. A term gift can be created by an individual, a corporation, or a foundation in the name of the donor or someone the donor chooses to honor. Term gifts are not eligible for World Fund match but are available to spend immediately.

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Endowed Funds

With gifts of US\$25,000 and above, a donor can set up an endowed fund that bears their name or a loved one's name. Endowed funds can exist as individually established funds or as pooled funds (smaller contributions under \$25,000 combined by a common purpose) that reside within the Permanent Fund along with all other contributions. In addition to SHARE and World Fund, endowed funds can be created for Rotary Foundation global grants and the Rotary Peace centers.

Creating an endowed fund for a global grant gives donors the opportunity to support one of the areas of focus, a district, or a region. For example, \$250,000 can establish the Joe and Jane Smith Endowed Fund for disease prevention and treatment in District 0001.

Major gifts of \$50,000 or more are being sought for Rotary Peace Centers endowed funds; however, gifts of any amount are accepted and appreciated. For more information establishing an endowed fund, contact your regional Rotary Foundation coordinator or a Planned Gifts or Major Gifts officer at The Rotary Foundation.

Memorial and Tribute Gifts

Memorial and tribute gifts may be directed to the Annual Fund, PolioPlus Fund, or Permanent Fund. A contribution to The Rotary Foundation is a meaningful way to honor or memorialize a loved one. Tribute gifts can be a perfect way to mark a birthday, wedding, or holiday/special occasion.

Corporate/Foundation Gifts

Corporate/foundation gifts may be directed to the Annual Fund, PolioPlus Fund, or Permanent Fund. In each district there are many corporations and foundations. Corporate or foundation contributions can help you achieve your district's Annual Fund goal. One way that these gifts can be pursued is challenge grants, used by many foundations. This grant is a pledge to augment or match a set amount raised by a club or district within a specific time frame.

For small or matching gifts, The Rotary Foundation can provide sample proposal letters, which the club or district can tailor to the organization's interests. For larger gifts, the Foundation's Fund Development staff can work with local Rotarians to develop proposals that meet the donor's interests. Before approaching a corporation or a foundation, contact The Rotary Foundation to avoid duplicating efforts.

Gift Planning

Donors may wish to plan their giving to The Rotary Foundation to obtain the best tax benefits, financial security now and into the future, and advantageous use of resources. Gift planning involves establishing an agreement or commitment during a donor's lifetime that benefits the Foundation in the future, usually at the death of the donor and/or certain other beneficiaries designated by the donor.

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Bequests. A bequest is the most recognizable form of planned gift. Cash, securities, real estate, or property may be given to The Rotary Foundation through an individual's will or estate plan. The donor retains full control and use of the gift during his/her lifetime. When the will is probated, the gift to the Foundation may qualify for a charitable deduction in computing estate taxes.

Life income agreements. This is a popular option in the United States. The donor makes a contribution but retains a present interest in the assets (for example, annual payments) and directs the remainder for the ultimate benefit of the Foundation. In addition, the donor may receive a reduction of taxes on income, capital gains, and estate assets. Life income agreements benefit the Permanent Fund. For specific questions, contact the Fund Development staff at plannedgiving@rotary.org. A brief overview of the most common life income agreements follows:

1. Charitable gift annuity. In exchange for an irrevocable transfer of US\$10,000 or more, The Rotary Foundation will guarantee annual payments to one or two people designated by the donor. There is an immediate charitable receipt for U.S. income tax purposes, and a portion of the annual payments returned may be free from income tax.

A deferred charitable gift annuity postpones the start of annuity payments for at least one year. This provision offers a younger donor an opportunity to take advantage of the possible immediate tax benefits while planning for retirement. The minimum age for the beneficiary is 50.

2. Pooled income fund. Gifts of cash, securities, or both at a minimum of US\$5,000 are combined in The Rotary Foundation Pooled Income Fund for investment with those of many other people, similar to a mutual fund. The donor (and/or income beneficiary) receives a proportionate share of the earnings for life, a charitable receipt for U.S. income tax purposes, a possible reduction in capital gains tax, and reduced estate taxes, when applicable. The minimum age for the beneficiary is 50.

3. Charitable remainder trusts. The donor transfers a minimum of US\$100,000 in money, property, or both to trust with The Rotary Foundation as trustee, which invests the assets in a separate fund. The donor receives either a variable income (unitrust) or a fixed dollar amount (annuity trust). This type of gift may reduce capital gains tax on donated appreciated assets and provides a U.S. charitable receipt for immediate income tax purposes. The minimum age for the beneficiary is 50.

Life insurance. A donor may name The Rotary Foundation a beneficiary of the proceeds of any life insurance policy. A donor may assign ownership of certain new or existing life insurance policies to The Rotary Foundation. Because there are many types of life insurance policies, donors wishing to make such a gift should first contact the Foundation's Fund Development Gift Administration staff for detailed guidelines on the acceptance and recognition of life insurance policies. When ownership of a policy is

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properly transferred according to The Rotary Foundation Gift Acceptance Policy, the donor may receive an income tax deduction for the value of the policy at the time the gift is made and for subsequent premium payments.

Retained life estate in a residence or farm. The owner of a residence or farm may give the property to The Rotary Foundation, claim a U.S. income tax deduction for the charitable remainder, and retain use of the property personally and/or for someone else. A portion of the residence or farm value may be excluded from estate tax.

Lead trust. The donor establishes and funds a trust that is written for a term of years and is designed to provide a fixed percentage of income to The Rotary Foundation until termination. At trust termination, the trust assets revert to the donor, donor's beneficiary, or donor's estate with substantial tax benefits. If the trust reverts to certain heirs, tax on the transfer may be eliminated completely.

Donor Advised Funds (USA only)

Rotarians, Rotary clubs, and districts can support The Rotary Foundation and other charitable organizations of their choice through The Rotary Foundation Donor Advised Fund. An individual or Rotary-affiliated group donor can establish a donor advised fund account at The Rotary Foundation, then recommend grants to fund Foundation activities or other approved charitable organizations. The Foundation handles the administration, investment, and accounting for the fund. It is a great alternative to forming a separate foundation.

A minimum initial contribution of \$10,000 is required, and additional contributions must be at least \$1,000. Cash, mutual fund shares, stocks, bonds, and other securities can be transferred into the fund. Grant distributions from a donor advised fund are made on the recommendation of the donor with agreement of The Rotary Foundation. The minimum amount for grant distributions is \$250.

Each donor advised fund is invested separately and professionally managed, offering the potential for contributions to grow and result in larger charitable gifts. For more information, contact The Rotary Foundation at plannedgiving@rotary.org.

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Donor Recognition and Appreciation Opportunities

The Rotary Foundation welcomes opportunities to show its appreciation to individuals and clubs for personal outright contributions supporting its grants and programs. The following chart outlines available recognition.

Individual Recognition Opportunities
<p>ROTARY FOUNDATION SUSTAINING MEMBER</p> <p>A Rotary Foundation Sustaining Member (RFSM) is an individual who personally contributes US\$100 or more each year to the Annual Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition. Contact your Rotary club president to obtain the annual Sustaining Member badge sticker in appreciation of this achievement</p>
<p>PAUL HARRIS FELLOW</p> <p>Paul Harris Fellow recognition is given in appreciation to anyone who contributes (or in whose name is contributed), a gift of US\$1,000 or more cumulatively to the Annual Fund, PolioPlus, or an approved Foundation grant. The recognition consists of a certificate and pin. An optional medallion is available for \$15.</p>
<p>CERTIFICATE OF APPRECIATION</p> <p>Occasionally, a donor contributes US\$1,000 and wishes to recognize a business or organization. In these instances, a Certificate of Appreciation is given instead of Paul Harris Fellow recognition, which is only for individuals.</p>
<p>MULTIPLE PAUL HARRIS FELLOW</p> <p>Multiple Paul Harris Fellow recognition is extended at subsequent \$1,000 levels. Recognition consists of a pin with additional stones corresponding to the recipient's recognition amount.</p> <p>US\$2,000 to 2,999.99 - one sapphire 3,000 to 3,999.99 - two sapphires 4,000 to 4,999.99 - three sapphires 5,000 to 5,999.99 - four sapphires 6,000 to 6,999.99 - five sapphires 7,000 to 7,999.99 - one ruby 8,000 to 8,999.99 - two rubies 9,000 to 9,999.99 - three rubies</p>

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Individual Recognition Opportunities Continued

PAUL HARRIS SOCIETY

The Paul Harris Society is a **district-administered** recognition for those who elect to personally contribute US\$1,000 or more each year to the Annual Fund, PolioPlus, or an approved Foundation grant. Individual districts handle all associated recognition for this program, and inquiries should be directed to the district. Paul Harris Society contributions count toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition.

MAJOR DONOR

The Rotary Foundation recognizes individuals or couples whose combined personal giving has reached US\$10,000, regardless of the gift designation. Major Donors may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level.

US\$ 10,000 to 24,999.99 – Level 1

25,000 to 49,999.99 – Level 2

50,000 to 99,999.99 – Level 3

100,000 to 249,999.99 – Level 4

ARCH C. KLUMPH SOCIETY

Donors who contribute US\$250,000 or more become members of the Arch C. Klumph Society. Portraits, biographies and in some cases video clips are housed in the Interactive AKS Gallery, one of which is housed on the 17th floor of World Headquarters and another that travels to Rotary events internationally. Members also receive special lapel pins and pendants, signed certificates and invitations to exclusive AKS events held worldwide. New members are invited to a special induction ceremony at World Headquarters.

Trustees Circle

US\$ 250,000 to 499,999.99

Chair's Circle

500,000 to 999,999.99

Foundation Circle

1,000,000 and above

BENEFACTOR

A Benefactor is someone who informs The Rotary Foundation in writing that he or she has made a provision in his/her estate plans for The Rotary Foundation or by making an outright gift of US\$1,000 or more to the Permanent Fund.

Benefactor recognition consists of a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin.

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BEQUEST SOCIETY

The Rotary Foundation recognizes couples or individuals who have made commitments in their estate plans totaling US\$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and a pin commemorating the commitment at each new recognition level.

US\$ 10,000 to 24,999.99 – Level 1
25,000 to 49,999.99 – Level 2
50,000 to 99,999.99 – Level 3
100,000 to 249,999.99 – Level 4
250,000 to 499,999.99 – Level 5
500,000 to 999,999.99 – Level 6
1,000,000 and above – Level 7

Club Recognition Opportunities

EVERY ROTARIAN, EVERY YEAR CLUB

This banner is awarded to clubs that achieve a minimum US\$100 per capita and 100 percent participation with every active member contributing some amount to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year.

100% PAUL HARRIS FELLOW CLUB

To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time banner recognition is requested. In addition to the banner, the club's name is included on the list of 100% Paul Harris Fellow Clubs available at www.rotary.org. This one-time only banner recognition is awarded throughout the Rotary year.

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100% ROTARY FOUNDATION SUSTAINING MEMBER CLUB

Rotary clubs must achieve a US\$100 per capita and **every** active member of the club must personally contribute \$100 or more to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year and is based on active membership as of 30 June

Club Recognition Opportunities Continued

TOP THREE PER CAPITA IN ANNUAL FUND GIVING

Banners are given to the top three per capita giving clubs in each district. To be eligible, clubs must achieve a minimum US\$50 per capita in *annual giving*. This banner recognition is awarded at the conclusion of the Rotary year.

Foundation Recognition Points

Recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, PolioPlus, or World Fund, or as a sponsor portion to a Foundation grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Foundation recognition points can be transferred by the donor to others to help them become or name them as a Paul Harris Fellow or Multiple Paul Harris Fellow.

Gifts to the Permanent Fund do not earn recognition points, but may qualify toward Arch C. Klumph Society membership, major donor recognition, benefactor recognition, or Bequest Society membership.

Special Fundraising Events

Districts and clubs use special events to raise funds for The Rotary Foundation, such as district conferences, Foundation seminars, and other special events recognizing individuals and couples who have made substantial contributions or provided outstanding service to Rotary.

Special events may be targeted to Rotarians and their spouses, while others may be developed to involve those outside Rotary and promote the Foundation. Consider these ideas and other appropriate ways to thank donors:

- »» Ask permission to print the donor's name in club or district communications.
- »» Arrange a special program to publicly recognize the donor (e.g., recognition presentation or dinner for a Paul Harris Fellow or Benefactor).
- »» Call the donor to personally express thanks for the gift.
- »» Provide the donor with updates on the district's Foundation activities.

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Some Rotary clubs also use Paul Harris Fellow recognition to honor local, national, or world leaders who have demonstrated commitment to The Rotary Foundation's goals and purposes. These recognitions serve three purposes: They honor a deserving individual, give important support to The Rotary Foundation programs, and bring Rotary favorable public attention.

Clubs sometimes make contributions to recognize a member's service or outstanding success in a specific project. There are also Foundation service awards specifically designed for that

Special Fundraising Events Continued

purpose. The Rotary Foundation respects donors' requests to remain anonymous and avoid public recognition, but appreciates the opportunity to thank them publicly for their generous contributions when desired. Such public recognition often encourages others to consider similar gifts. The Rotarian responsible for coordinating the recognition presentation should make the recognition request to the Foundation. Suggested presentation remarks are provided by the Foundation to the Rotarian or club president when the recognition items are mailed or upon request.

Fundraising Tips for Major and Estate Gifts

- 1. Information is key.** People give to Rotary when they know the specifics of what we are accomplishing around the world — tout your district's success in writing, in person, and on the Web to attract new donors.
- 2. Everyone has a different motivation for giving.** Take the time to learn more about an individual's experiences and desires — using the same approach for everyone is less effective and can miss significant donors.
- 3. You can never say thank you enough.** Stay in touch after you say thanks the first time — what you or your district says or does the next month and next year influences whether another gift or bequest is made to the Foundation.
- 4. Help is available.** Use the district and Foundation resources available to you as described in this document. Build and support your district team by working with the Foundation's Annual Giving, Major Gifts, and Planned Giving teams assigned to your zone.

Fundraising Resources

Additional fundraising and recognition resources can be found at shop.rotary.org and at www.rotary.org/contribute.

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TIPS FOR RAISING FUNDS FOR ROTARY FOUNDATION

EVERY ROTARIAN EVERY YEAR (EREY)

What the Foundation Committee in Sequim Sunrise Rotary has done to achieve the EREY banner for four years in a row — in no particular order.

1. We have a collection table for Rotary Foundation giving set up at every regular club meeting — next to the meal cashier.
2. We tell the club members that we are an EREY club and expect to repeat again during the current year.
3. All of the members of the Foundation Committee are Paul Harris Fellows. (And, as of this year, all members of the club are Paul Harris Fellows)
4. Several of the members of the Foundation Committee are Major Donors. (We have five or more major donors in the club).
5. We have learned and practice the simple method of asking individuals to give - not just asking the group.
6. We have had occasions when a member was absent, one of us made a \$5.00 contribution on his/her behalf, then informed them at the next meeting what we did and asked them for the money to pay us back.
7. We have told the general membership when were down to five or so who had not made a contribution - not mentioning the member's names - but making a plea to those present to make a contribution.
8. We display EREY banners that we have been awarded in the past.
9. We have a "Foundation Moment" at least once a month during our meetings.
10. We have displayed a poster that contains a photo of each Paul Harris award pin from the first through the Major Donor.

2013 ROTARY FOUNDATION FUNDRAISING MANUAL

ROTARY DISTRICT 5340

TIPS FOR RAISING FUNDS FOR ROTARY FOUNDATION

11. We rely on member contributions only - we do not have any fund raising event for the Rotary Foundation.

12. We include a ten dollar bill in each induction packet given to new members, and request that they give it to the Foundation collection person at the next meeting, to become their initial contribution. Funds for this come from the club's administration budget.

13. We offer two or more "Matching Programs" each year. Members donate their recognition points and those points are offered, usually on a two points for each dollar basis.

14. We also use points to award Paul Harris awards to community persons who demonstrate "Service above Self".

15. We stress "No Contribution is Too Small" (but we do encourage at least \$2.00 a week) - which makes \$100 per year.

16. We remind members that giving should not stop when the first Paul Harris is achieved - that giving should be a continuous process as a part of International Service.

17. Our printed club directory lists each member and the number of Paul Harris awards they have received.

18. We have displayed posters and banners provided by RI about EREY and the Foundation.

Compiled by: Jim Pickett

Past Assistant Governor and Area Foundation Representative

Rotary Club of Sequim Sunrise, District 5020

2013 ROTARY FOUNDATION FUNDRAISING MANUAL

ROTARY DISTRICT 5340

TIPS FOR RAISING FUNDS FOR ROTARY FOUNDATION

Do's and Don'ts for Club Presidents and Foundation Chairs to Maximize support for the Foundation

It's up to you - make sure your Club knows:

TRF is unique; 100% of money goes to projects- not to administration

Most of the money comes back to the District after a 3 year cycle

Your Club controls where the money goes

Non religious, political, governmental

A giving Club is usually an active one in both Community Service and International Service. Participation builds Rotary friendships world-wide.

Foundation Funding Provides;

Matching Grants (Usually international)

District Simplified Grants (Usually local)

Various Scholarships

Group Study Exchange Teams

Polio Plus (Only three endemic countries left IN THE WORLD)

Why do people give?

Altruistic reasons

They want to make a "difference"

They want to solve a "problem"

Personal Recognition

Giving is morally rewarding

#1 REASON- Because They Are Asked

2013 ROTARY FOUNDATION FUNDRAISING MANUAL

ROTARY DISTRICT 5340

TIPS FOR RAISING FUNDS FOR ROTARY FOUNDATION

What do I need to do?

Set an ambitious but attainable goal, challenge each Board Member to achieve their next Paul Harris during your year

Keep the Board aware of the status of EREY %, per capita and total pledged

Emphasize, Every Rotarian Every Year, Time Treasure Talent at your meetings

Ask every member- PERSONNALLY, one to one

Emphasize most Rotarians join to “give back to the community and the world” the Foundation is the ideal vehicle for that

Coordinate with Community Services and International Services to do brief presentations of what the Club is achieving; do it visually whenever possible

Encourage giving to the Foundation over other Charities

Use tax deadlines as reminders for giving

Do a Foundation minute at almost every meeting

Make sure achievements are recognized publically at the meeting, ask at the meeting when presenting why the member decided to support the Foundation

Make the Club proud that they are Foundation achievers

Some points to remember

50% of your total will likely come from 10% of the Club population but emphasize everyone’s participation at the level they can achieve

Constant discussion and emphasis is mandatory but be aware no one likes an old fashioned “car salesman”, you CANNOT embarrass members into participating and that’s not what Rotary is about, though without the Foundation we’re just a social Club.

Make sure the members know what they are achieving by participating, most have never lived overseas so don’t realize the great impact of Rotary, your Club will save lives in the third world, make sure you members know.

2013 ROTARY FOUNDATION FUNDRAISING MANUAL

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TIPS FOR RAISING FUNDS FOR ROTARY FOUNDATION

You Have Help

Ensure that your Club Secretary gets you special access as the Foundation Director to the www.Rotary.org website. This will give access to several reports that are more self explanatory than they first seem and will make the job of tracking where you are and where you're going easy. You do not have to be an accountant to do this. It seems a little daunting at first; it is not hard, even if you hate math

KEY REPORTS YOU NEED TO KNOW (available through above)

Club Recognition Summary (CRS)

Will show where each member is in their total Foundation giving up to the +\$9000 level. Use this report to show members "how far they are from their next Paul Harris"

EREY Contribution Report

Shows much history but primary use, a snap shot of who has contributed this current Rotary year.

Monthly Contribution Report (MCR)

Show where your Club is, in relation to the District in per capita, annual, restricted and total giving, if you establish a giving Club this will be useful.

2013 ROTARY FOUNDATION FUNDRAISING MANUAL

ROTARY DISTRICT 5340

5340_Club_Fundraising_Dec_Analysis.pdf - Adobe Reader
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Club Fundraising Analysis

For The Month of DECEMBER (2012 - 2013)

District 5340

Annual Fund Goal	
2012 - 2013	\$9,792
2011 - 2012	\$7,600
2010 - 2011	\$8,200
2009 - 2010	\$8,900
2008 - 2009	\$10,640

Annual Fund Contributions

2012 - 2013	\$10,584
2011 - 2012	\$14,326
2010 - 2011	\$14,041
2009 - 2010	\$18,736
2008 - 2009	\$19,442

Fallbrook, CA

Total Contributions	
2012 - 2013	\$18,235
2011 - 2012	\$33,280
2010 - 2011	\$33,641
2009 - 2010	\$31,760
2008 - 2009	\$22,912

AF Per Capita	Club	District
2012 - 2013	\$158	\$68
2011 - 2012	\$194	\$146
2010 - 2011	\$185	\$140
2009 - 2010	\$218	\$106
2008 - 2009	\$216	\$124

Membership

2012 - 2013	67
2011 - 2012	74
2010 - 2011	76
2009 - 2010	86
2008 - 2009	90

	EREY Members	Sustaining Members	PHS Eligible
2012 - 2013	27	25	5
2011 - 2012	30	27	10
2010 - 2011	76	40	9
2009 - 2010	41	37	10
2008 - 2009	41	38	8

Note: The Benchmark amount \$16,636 is a prior four-year club average for contributions to the Annual Fund between 2008 - 2009 and 2011 - 2012.

To view a current Club Recognition Summary, please use Member Access or call our Contact Center toll free at 866-9-ROTARY (866-976-8279) or by email at contact.center@rotary.org.

Data As of: 14-Jan-2013
Club Fundraising Analysis R00079.1209


2013 ROTARY FOUNDATION FUNDRAISING MANUAL

ROTARY DISTRICT 5340

The Rotary Foundation 2013-14 Foundation Giving Goals .pdf - Adobe Reader

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THE ROTARY FOUNDATION

2013-14 FOUNDATION GIVING GOALS

EN-(1112)



Please visit Member Access/Rotary Club Central to set your goals: <https://map.rotary.org/en/selfservice/Pages/login.aspx>

Club Name (please print)

Club Number/District

2013-14 Club President's Name (please print)

E-mail

ANNUAL FUND			
Your Annual Fund contributions support humanitarian and educational programs both locally and internationally. Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals.			
Calculate your club's Annual Fund goal by multiplying the number of individual donors times the average contribution amount and adding all of the goal totals.			
Giving Level	Number of Individual Donors	Average Contribution Amount	Goal Total USD
Paul Harris Society (1000 USD or more)			
Sustaining Members (100 USD or more)			
Every Rotarian, Every Year (Up to 100 USD)			
Other Contributions (Fundraising events, corporate gifts etc.)			
ANNUAL FUND GOAL TOTAL		USD	

POLIOPLUS FUND

As funding is a critical concern in the effort to eradicate polio, Rotarians are asked to continue supporting the program until we reach our ultimate goal: the global certification of polio eradication.

Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals.

Foundation Giving Goals

- How to fill out the Annual Fund form
 - Use the Club Fundraising Analysis
 - Number of Paul Harris Fellows x average gift
 - Number of Sustaining CMembers x average gift
 - Everybody else x \$100
 - Plus other contributions = Annual Fund Goal
- Stretch your club goal to the outer limit
 - You will surprise yourself by reaching it!

2013 ROTARY FOUNDATION FUNDRAISING MANUAL

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HOW TO REPORT YOUR FOUNDATION GOALS

You may get questions regarding “How to Report your Foundation Goals”

Here’s what you need to do:

1. You must be registered on Rotary International (RI) Member Access.
Go to this link <https://map.rotary.org/en/selfservice/Pages/login.aspx>
IF you do NOT have a Member Account, go to “Create Account.”
Now....In your Member Access account, you will go to “Rotary Club Central” ... (under “Club Activity”) You will now see “Goals and Progress”next to that find “View Details” ... OK, that’s where you will “Edit” your Membership and Foundation information. Don’t forget to GO TO your Year 2013-14...you’ll find that down on the page under “Goals and Progress.”
2. Submitting paper “hard copies” of Goal Report Forms is not required.
3. Yes, this is a new procedure from RI So we’re learning as we go...Happy Rotary.

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