

**Educational Session Notes**  
**Our Foundation and Community Impact**  
**Training Leader—Jane Helten**

4:45 PM

***The “WHY” of Rotary is friendship, working together, engaging our skills and passion, taking action to have a positive impact.***

***THE ROTARY FOUNDATION is a great vehicle to achieve this. Engaging your club with The Rotary Foundation, OUR Foundation, will enrich your club, your members experiences and your year as President.***

**Explain the importance of YOUR Rotary Foundation**

Highest rating 9 years in a row	90% of funds go to projects and programs
CNN ranks the Rotary Foundation #5 in top 10 charities in the world	Charity Navigator highest rating at 4 Stars
Association of Fundraising Professionals Top Charity Award	3 Buckets: Polio Plus The Annual Fund - EREY Endowment Fund
Assets of \$1 Billion at TRF	

**The Foundation Endowment Fund**

Invest for 3 years, then original available for project	Your Rotary legacy far into the future
Many options for how to give and where to direct funds	Further details, and assistance: Your District or <a href="http://www.rotary.org">www.rotary.org</a>
Endowment funded primarily through Estate planning	

**The Annual Fund – EREY/Paul Harris Recognition**

Invest for 3 years, then original available for projects	½ to World Fund
Administrative costs are mostly covered by interest earned	½ to District Designated Funds
Requires a steady income to work	
<b><i>For Example – Annual Fund -- \$400,000</i></b>	
\$200,000	\$200,000
DDF	World Fund
\$100,000 Global Grants	\$100,000 District Grants
Matching Funds	
<b>DDF – 50% of Annual Fund managed by District</b>	<p style="text-align: center;"><b>District Grants</b></p> <ul style="list-style-type: none"> <li>• Small Scale, short-term activities chosen by each District and supports:</li> <li>• Humanitarian Grants</li> <li>• Scholarships of any level, length or area of study.</li> <li>• Vocational Training</li> </ul>

**How can you Engage your Clubs with TRF?**

What goals can be set (for Foundation)?	<ul style="list-style-type: none"> <li>• EREY – embed in dues</li> <li>• Paul Harris Society/Members – celebrate achievement</li> <li>• Projects</li> <li>• Benefactors</li> <li>• Educate members/Presentation</li> <li>• Club goal – recognition points</li> <li>• Foundation Chair – run reports</li> </ul>
What resources would be valuable to your club?	

Does your Club apply for grants?	
Do you recall the last grant your Club received?	

**Get your club qualified**

MOU	Grant Seminar
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**Identify your project and apply**

**Complete the Reports**

**Celebrate! (and start another project)**

### Understand the Different Grant Types

Start with the community	Encourage local ownership
District Grant can be either local or international	Grant must be sustainable – for international grants, buy supplies locally
Find local funding	The value of a foundation grant: <ul style="list-style-type: none"> <li>• Demonstrates vision</li> <li>• Results in Club engagement, vibrancy and recognition</li> <li>• Increases Giving</li> <li>• Creates Leverage.....Significant Leverage!</li> </ul>
Global Grants mean significant leverage	
<b>Normal 3.5x</b> <ul style="list-style-type: none"> <li>• \$10k Club contribution</li> <li>• \$10k DDF + \$15k TRF (1:1 DDF &amp; 0.5:1 Cash)</li> </ul>	<b>Canada</b> <ul style="list-style-type: none"> <li>• \$10k Club + \$10k DDF</li> <li>• GOC Matches both 1:1 (+\$20k=\$40k)</li> <li>• TRF 1:1 on DDF (+\$10k=\$50k)</li> <li>• TRF 0.5:1 on \$30k Cash (+\$15k=\$65k)</li> </ul>

### How can the Foundation Centennial help you support TRF?

Come up with 3 buckets at club meeting, "change for change"	Club kick in first \$26.50 and ask members to come up with the difference to make up \$100
e-club partner with another land-based club and make land-based club the lead	

**Explore partnerships with other Clubs for a project**

**Explore ways to engage your membership with Your Rotary Foundation**

**Polio Fund**

**Annual Fund – held for 3 years comes back to you**

## Endowment Fund

### Key Outcomes

Foundation is your tool as a President, use it

Explain the importance of Your Rotary Foundation

Explain how YOUR Rotary Foundation works

Identify how to access and use Foundation funds to meet club objectives

### Rotary Resources

Rotary Support Center: 866-976-8279

Rotary Club Central <http://rotary.org/clubcentral>

Presidents Manual: [http://www.rotary.org/RIdocuments/en\\_pdf/222en.pdf](http://www.rotary.org/RIdocuments/en_pdf/222en.pdf)

The Rotary Foundation: <https://www.rotary.org/en/about-rotary/rotary-foundation>

The Rotary Foundation: <https://my.rotary.org/en/rotary-foundation>

The Rotary Foundation Reference Guide: <https://my.rotary.org/en/document/rotary-foundation-reference-guide>

Ways to Give Brochure: <https://my.rotary.org/en/document/ways-give>

Your Rotary Legacy Brochure: <https://my.rotary.org/en/document/your-rotary-legacy-doing-good-world-beyond-your-lifetime>

## Parking Lot Items

1. RI – 6 months in Australia. Can get access to ClubRunner?  
Not as guest which is limited

**9:30 AM**

How are funds from foundation disposed?

Example: \$400,000.00

District

Global Fund

District Directed: Fund \$200,000.00

\$200,000.00

District fund\*: \$100,000.00

Global Fund \$100,000.00

To encourage foundation contributions:

Every Rotarian every year

Paul Harris Fellow

Paul Harris Society

Major Donner

Bequest Society

Arch Klump Society

To Obtain a Grant

You must meet the following:

Qualify as a club – 2 members have completed grant management seminar

There must be community support

Sustainable

Be measurable

You can join with other clubs

Request support from District Foundation chairs

#### Leverage of Foundation Grants

Club contribution:	\$10,000.00
From District:	\$10,000.00
The Foundation:	\$10,000.00
TRF	\$ 5,000.00
TOTAL	\$35,000.00

#### Canadian System

Club contribution:	\$10,000.00
From District:	\$10,000.00
Cdn Gvt	\$20,000.00
The Foundation:	\$10,000.00
TRF	\$ 5,000.00
TRF (match)	\$10,000.00
TOTAL	\$65,000.00

#### Features of a District Grant

A single block grant awarded annually for club and district projects

Local or international projects

Local decision making with broader guidelines

Smaller activities and projects

#### Global Grants

Align with areas of focus

Respond to a community need

Strengthen knowledge, skills, resources

Have long term sustainable benefits

Have measurable results

Have a budget of at least \$30,000.00

**1:45 PM**

There are two funds:

The Endowment Fund, where contributions are invested in perpetuity and the a portion of available earnings help fund Foundation activities.

The Annual Fund, where contributions to The Rotary Foundation are transformed into grants that fund local and international humanitarian projects, scholarships, and activities, such as vocational training teams. At the end of every Rotary year, contributions that were made 3 years ago from all Rotary clubs in the district are divided between the World Fund and the District Designated Fund, or DDF. An example of this would be a total of \$400,000.00 is divided with \$200,000 directed to the World Fund and \$200,000 directed to the District Designated Fund, or DDF. The District can then allocate \$100,000 to District Grants and \$100,000 to Global Grants.

Ways to encourage your club w/TRF:

1. EREY- Every Rotarian Every Year
2. Set goals for the Club
3. Encourage long term giving
4. Have a Paul Harris ceremony or dinner for recipients
5. Encourage automatic contributions out of a checking or savings account
6. Have your club make a donation for club member's birthdays
7. Award individuals in the community or family members with club points that would equal a Paul Harris

How to leverage funds by applying for a District Matching Grant in the United States

Let's start with \$10,000 cash from a club-

They apply and receive a District Grant (DDF) for \$10,000

They also receive \$10,000 from TRF which matches District Funds 1:1

They also receive \$5,000 from TRF which matches club cash .5: 1

This now is a \$35,000.00 grant.



How to leverage funds by applying for a District Matching Grant in Canada

Let's start with \$10,000 cash from a club-

They apply and receive a District Grant (DDF) for \$10,000

They also receive \$20,000 from the Canadian Government

They also receive \$10,000 from TRF which matched District Funds 1:1

They also receive \$5,000 from TRF which matches club cash .5:1

They also receive \$10,000 from TRF which matched the Canadian Government .5:1

This now is a \$65,000.00 grant.

Ways to engage membership in the Foundation:

1. Getting information back to the club so that members are well informed and have a better understanding
2. Host an event- celebrate the centennial year of the foundation, highlight past grant projects, etc.
3. Explore partnerships with other clubs- an example would be several clubs that combine their resources for an International Project.

**3:45 PM**

Goals for TRF from Presidents:

- Enter your club goals into Rotary Central
- Goals are the sum of individual donations to TRF from your club
- EREY Every Rotarian Every Year. Finding a mechanism to motivate your members to become and EYER club
- Set club goal for Polio Plus (donations count towards PHF for members. Make that clear)
- Set a goal of becoming a 100% PHF club
- Be a motivator and cheerleader for TRF to get club buy in. Focus on "the why" of giving, the projects and good work rather than just a focus on giving.

Understanding Foundation Giving and District Designated Funds. Vs. World Fund

- Your district gives \$400,000 to TRF.
- Three years later, funding returned:
- \$200,000 goes to District Designated Funds: \$100,000 for DDF grants and \$100,000 for Global Grants.
- \$200,000 goes to the World Fund
- In sum: \$400,000 becomes 50% District matching funds and 50% World Fund

Understanding the Match to leverage club cash:

- \$10,000 from Club Cash +
- \$10,000 District Designated Funds +
- \$10,000 from TRF World +
- \$5,000 from TRF 50% match of Club Cash =
- \$35,000

Understanding the Match to leverage club cash in Canada:

- \$10,000 from Club Cash +
- \$10,000 District Designated Funds +
- \$20,000 Canadian Government
- \$10,000 from TRF World +
- \$5,000 from TRF 50% match of Club Cash +
- \$10,000 TRF match 50% for Canadian Government Cash =
- \$65,000

What are ideas for The Rotary Foundation Centennial Celebration?

- Use the first donation of \$26.50 as a reference point for a theme. For example, ticket costs are \$26.50 or serve a 26.5 oz steak.
- Have a club project that is focused on honoring the 100<sup>th</sup> anniversary and make sure that the project has the Rotary Mark of Excellence on it or the TRF Centennial logo.
- Explore a crowd funding campaign to bring in a large donation and participation in honor of the Centennial.
- Use the Centennial as a reason to encourage club members to all donate and become an EREY club.

What are ideas for Foundation partnerships other clubs?

- Attend your District's quarterly grant meetings to find partners for projects and collaboration
- Attend and display projects at your District Conference as an opportunity to find partners and networks
- Communicate with your AGs

Ideas to Engage members in The Rotary Foundation:

- Educate members and make the stories "personal" to your club
- Present compelling testimonials
- Find out member interests/passions and focus service projects/TRF on those

In sum, participants were encouraged that they need not fully grasp all of the moving parts of The Rotary Foundation and to seek any guidance from AGs, DG and District Foundation Committee. Participants were encouraged to download a very useful **The Rotary Foundation Reference Guide** (Google that, available as a PDF download)

**Training Leader—Peter Schultz**

**4:45 PM**

Endowment Features

- Principal never spent

- You can direct where \$ go
- You can name the fund at the \$25,000 level

#### Annual Fund

- Contributions spent after three years
- Interest covers administration expenses
- About 1/2 comes back to district as District Designated Funds

#### Recognition

- Every Rotarian Every Year (EREY) - something from every member
- Sustaining Members - \$100 per year
- Paul Harris Fellow - \$1,000 cumulative
- Paul Harris Society - commitment of \$1,000 per year

#### Value of Foundation Grant

- Encourage giving
- Gets clubs engaged
- Physical involvement = engagement

#### How to Engage Clubs with TRF

- Understand how TRF works
- Contact district foundation chairs
- Know how to use online/automatic contribution and help less technically inclined Rotarians to enroll

#### Ideas to Build on Foundation

- Created fantasy football league - to play need to contribute to TRF
- Golf ball game
- PHF Circle - 4 Rotarians x \$250/yr = \$1,000. Recognition rotates
- Foundation Dinner - host pays for dinner and gets 500 points. Every participant pays \$100 to TRF
- Poop in the park

### **9:30 AM**

Our discussion ensued with points regarding Charity Navigator offering very high marks on the quality of the management of the Rotary Foundation.

In describing the funding of the RI Foundation, one point to make is that only the interest is spent, not the corpus. The Annual Fund covers the operating costs of the RI Foundation.

Rotary has seen significant partner funding IE: Bill Gates Foundation with Polio Plus campaign.

2017 is the Centennial year for the Foundation. Clubs should celebrate this activity by holding an event or fundraiser centered around the Foundation.

Rotary Direct is an easy way to establish reoccurring giving. Periodic contributions may be made through checking account, credit card, or other means.

District Designated Funds are smaller, local grants.

Global Grants have a minimum budget of \$30,000

Theme with grants can be “ Doing Good In The World”.

Discussion ensued about engaging club members with TRF through table topic session

Ideas:

Cliff Dochterman former RI President talked about encouragement of clubs to “ roll up their sleeves”.

Idea of quizzing club members on foundation facts.

Create an awareness of the Centennial and its facts.

Include every rotarian every year on club dues invoice.

With Water and Sanitation projects there are available projects listed with a Rotary Action Group.

Zone 25/26 also has available projects on their website.

Constantly recognize donors and create momentum in the club.

How does a club access funds?

**1:45 PM**

**Endowment fund:**

Permanent

Uses only interest

5% tax protection for contingency

Named fund

Directed fund

**Annual fund:**

Shared cycle (3 years)

Hand pump analogy

Usable funds

50% comes back

**Club engagement in the fund:**

They will know what is getting done – ‘the why’

Take photos of teams and the projects create posters

Gather info and data from the club

Thank you videos

Ping pong idea

Online grant training for district/global grants

**Value of the foundation to clubs:**

Allows for their own ‘why’

Recognizes what has been done

**How to build a fund:**

US clubs should seek a Canadian partner

Move from playground building clubs to housing for disabilities – do needs assessments, work with municipalities and other partners

Project Unity – small clubs partnering with other small clubs for international projects

Poop in the Park fundraising idea – horses in local park, people purchased plots of park property – 50/50

**3:45 PM**

**Engage Membership with Rotary International Foundation**

- Paul Harris (PH) club points to award to members and others
- Wish list
- Auction PH points

**What is Rotary Direct?** Monthly auto-payment by credit card. Easy to set up

## **How Can You Engage Your Club with The Rotary Foundation (TRF)?**

- Presentations
- Need partner Rotary club in other country for Global Grant
- Put information in newsletter
- Foundation chair gives updates of opportunities
- Educate membership
- When presenting Paul Harris pin, explain “why”

### **How to Get Grants**

- Attend District Grant Management Seminar to qualify. Some Districts are now offering this online
- Understand different grant types: Global & District
- Complete reports
- Celebrate: reinforce the “why”; great for morale

### **Value of Grant**

- Takes you back to the “why”
- Leverage

### **How to Build Foundation**

- Foundation centennial supports TRF
- Partnerships with other clubs
- Canadian/US clubs partner for cook stoves; if approved can qualify for 6.5x \$'s in matching grants
- Partner across border clubs – if both struggling this can help to strengthen them. Presidents can trade chairing each other's meetings by way of skype

**Training Leader—Karen Cook**

**4:45 PM**

Who donates to TRF?

- Rotarians
- Foundations (Gates)
- Clubs
- Districts

- ANYONE!

What are some resources for clubs?

- Grant recipients present a program
- AGs
- Slides/videos
- Grant seminars
- Brochures

Recognition

- Individual – PHF, PHS, etc.
- Club banners with name/year ribbons
- Plaques for display at meetings
- Share names in PowerPoint

Goal setting

- 100 squares (like sports pool)
- Pass the hat for Polio
- Rotary Direct

Accessing Funds

- Get qualified
- MOU outlines stewardship requirements
- District Grants - short term – local or international projects – reports at the end
- Global Grants – long term – international projects with host country partner – sustainable – annual reports until done

**9:30 AM**

What is the Rotary Foundation?

- Grants
- Charity
- Stretches funds

Who donates to TRF?

- Us (Rotarians)
- Friends/family

How do you get club members to donate?

- \$1 = 1 recognition point
- Members and clubs generate points when they donate dollars

What are some resources?

- Members with points
- Club becomes Paul Harris Fellow with club points (1 example)
  - 1000 points for a PHF
  - Must transfer at least 100 points

- One club used its recognition points to become 100% PHF club

#### Benefits of grants

- Leverages club money
- One club used a grant to purchase i-pads for autistics
- Matching funds on a dictionary project
- HS graduation
- Right to Read project

#### Qualification

- Training
- MOU – stewardship document

#### Ideas to get club engaged

- Add optional giving to dues invoice
- Weekly raffle proceeds to TRF
- Multiple club Winter Fest
  - Tent with information
  - 100 sky lanterns
- Feed the Pig – loose change into big piggy bank
  - Give all members equal credit for donation
- Beer / wine tasting fundraiser
- Donate to TRF in lieu of payment for service provided by club member
- Birthday age = \$ match
- 10x10 square board – like sports pool - \$10 per square creates one PHF

**1:45 PM**

#### How do you Engage Your Club with TRF?

- Goal setting as a club activity
- \$100 per Year, per member
- Have all members become Paul Harris Fellows
- Create a Foundation Fund Raiser

#### What resources are available?

- Members
- Assistant Governors
- District
- Zone
- RI website

#### What types of grants are available?

- District Grants – short term – check with district for specifics
- Global Grants – long term International Projects

#### How do you access Foundation Funds?

- How do you get qualified?
  - attend grant training session
  - MOU to be signed



- Projects can be local or international

What is the grant process?

- Get community involved
- What do they need?
- Have local participation
- Measure Success

What does getting a grant say about the President?

- demonstrates goals and a vision
- recognize all club members that participate in the grant process

How can we use the TRF Centennial?

- Club program
- do a project to celebrate the centennial
- start up TRF was \$26.50
- approach businesses to raise funds at \$26.50
- recognize in local papers with a Thank You Ad

How can partnering help?

- six clubs applied for same grant, to work together
- partner with a lead club
- don't forget to include all other clubs in the process

How do you engage members?

- show club members the value through to project completion
- club visioning, keep members informed
- resources through RI website, indicates programs

**3:45 PM**

**Training Leader—Janelle Harvey**

**4:45 PM**

***Value of Foundation Grant***

Demonstrate Vision

Leverage grants will attract new members & retain

It requires planning = vision

Building momentum for future projects

Reminds members how Foundation giving is coming back to the club

Be part of a success

***Goals***

Set standard higher than average

***Resources***

Educate members

## Existing organizations & partnerships

Good sized group--however, tired and not as focused on subject. Involved but also ready to be done. Some felt there was repetition, but all in all a very good session considering the amount of information already taken in.

### **9:30 AM**

#### How to engage clubs into participating in the TRF

1. EREY Banner (every Rotarian, every Year)
2. Speaker gift goes to Polio Plus
3. 26.50 from every new member – gets a blue sticker
4. Polio bucket every week
5. 126.50 goal EREY

#### Resources

1. Foundation Minutes Video
2. My Rotary website

#### Value

1. Vision to attract new members.
2. Pride to do more

#### Funds Qualifications

1. Grant Seminar, 1 member
2. Sign MOU
3. Succession planning

#### Community RFP's

1. Know needs
2. Ownership
3. Issues
4. Sustainable
5. Stimulate
6. Skin in the game
7. Celebrate

**1:45 PM**

**3:45 PM**

Engaging in TRF:

- Set goals – EREY, 50/50 (Member/Club)
- Make it part of dues (extra \$100)
- Honor contributors
- Special \$26.50 from every member
- Apply for Grants
- Rotary Direct
- Plan for succession of Foundation Chair

Foundation Building

- Partner up
- Use Club Recognition points to “top up” Members contributions
- Partner with Clubs in other countries
- Show how TRF impacted a particular project
- Remove barriers for contributing (take credit cards)

**Training Leader—Howard Svigals**

**4:45 PM**

What goals can be set?

- EREY
- World Grants

Resources

- District
- November is Foundation Month

**9:30 AM**

Rotary International has been given the highest rating for foundation management for the past nine years.

- CNN rates the RI Foundation one of the top 5 in the world.
- 90% of funds go towards programming – actually, this is misleading, as 100% of the funds return to programs, but the way it is reported is at 90% because staff are paid through the interest.
- Rotary International received the outstanding foundation award in 2016.

Howard had some great slides that explained the way funds are allocated through Rotary International.

- Endowment
  - One Billion Dollars
  - 350 Million in Cash
  - Cash is moved every three years
- Annual Fund
  - Every Rotarian Every Year is here
  - Receives close to 120 million annually
  - 100% is spent
  - Interest covers administrative costs
  - Funds are allocated to districts on an every-three-year basis (i.e., what we give is returned to us three years later – so what we give in 2016 will return to our District for grants in 2019)

There was additional discussion on the types of donations.

- Every Rotarian Every Year
- Sustaining
- Paul Harris Fellow
- Paul Harris Society
- Benefactor
- Major Donor
- Bequest Society
- Arch Klumph Society

DDF:

- 50% back to district 3 years later
- 50% to RI endowment
- Uses: District grant used in one Rotary year (it is a reimbursement grant)
- Uses: Humanitarian/Scholarships/Vocational Training

World Fund:

- Managed by Rotary
- Primary Use: Global Grants
  - More than one year
- Fits one of six areas of Rotary Focus

Other:

- Polio Plus
- One of Six Peace Centers, Worldwide
- Endowment Funds

Benefits to:

- Scholars
- Communities
- Individuals
- Families
- Children
- (Future Rotarians!)

**1:45 PM**

**No Notes submitted**

**3:45 PM**

**No Notes submitted**