

# District 7150

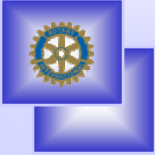
## Rotary Foundation Seminar



October 20, 2007

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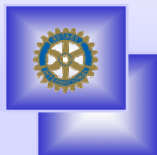
**Motto: “Doing good in the world.”**



# Jack Luchsinger, PDG

Rotary District 7150  
Foundation Committee Chair

# Fundraising for The Rotary Foundation



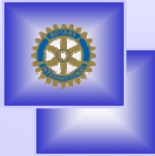
Contributions support the programs of  
The Rotary Foundation  
and are vital to the success of our  
organization to do good in the world

# Annual Programs Fund



- Supports Foundation programs
- Vital to the Foundation's role *today*
- Contributions earn Paul Harris Fellow Recognition
- Contributions support *Every Rotarian, Every Year* initiative

# Permanent Fund



- Contributions support long-term sustainability of our Foundation
- Funds invested, the corpus is never spent
- Supports Foundation programs
- Contributors include **Benefactor** and **Bequest Society** members
- Key to Foundation's role in the *future*

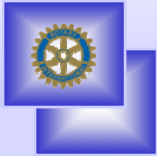
# Establish Fundraising Goals



Annual Programs Fund goal for 2006-07  
US \$120 million – or US\$100 per capita

- In order to reach the Annual Programs Goal
- encourage clubs to set their club goals
- **higher** than last year

# Fundraising Tips



- Lead by example – make your leadership gift at the beginning of the Rotary year
- Clubs are encouraged to support TRF during club visits
- Clubs are urged to participate in at least one TRF-supported project a year
- Establish or increase participation in Paul Harris Society

# Member Access



- View Membership Data
- View own personal contribution history
- Search Official Directory
- Manage E-mail Subscriptions
- View Club Recognition Summaries
- View Monthly Contribution Reports
- Contribute to TRF

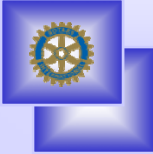
# Understanding *SHARE*



What does it do?

*SHARE* transforms TRF contributions into  
Ambassadorial Scholarships,  
Matching Grants projects,  
Group Study Exchanges,  
and more.

# SHARE



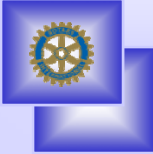
## The 3-Year Cycle

**TRF operates on a unique funding cycle, using contributions for program activities three years after they are collected**

**The three-year cycle gives districts time for program planning and participant selection**

**TRF uses the earnings from *SHARE*'s 3-year investment cycle to pay for administration and fund development**

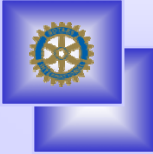
# SHARE



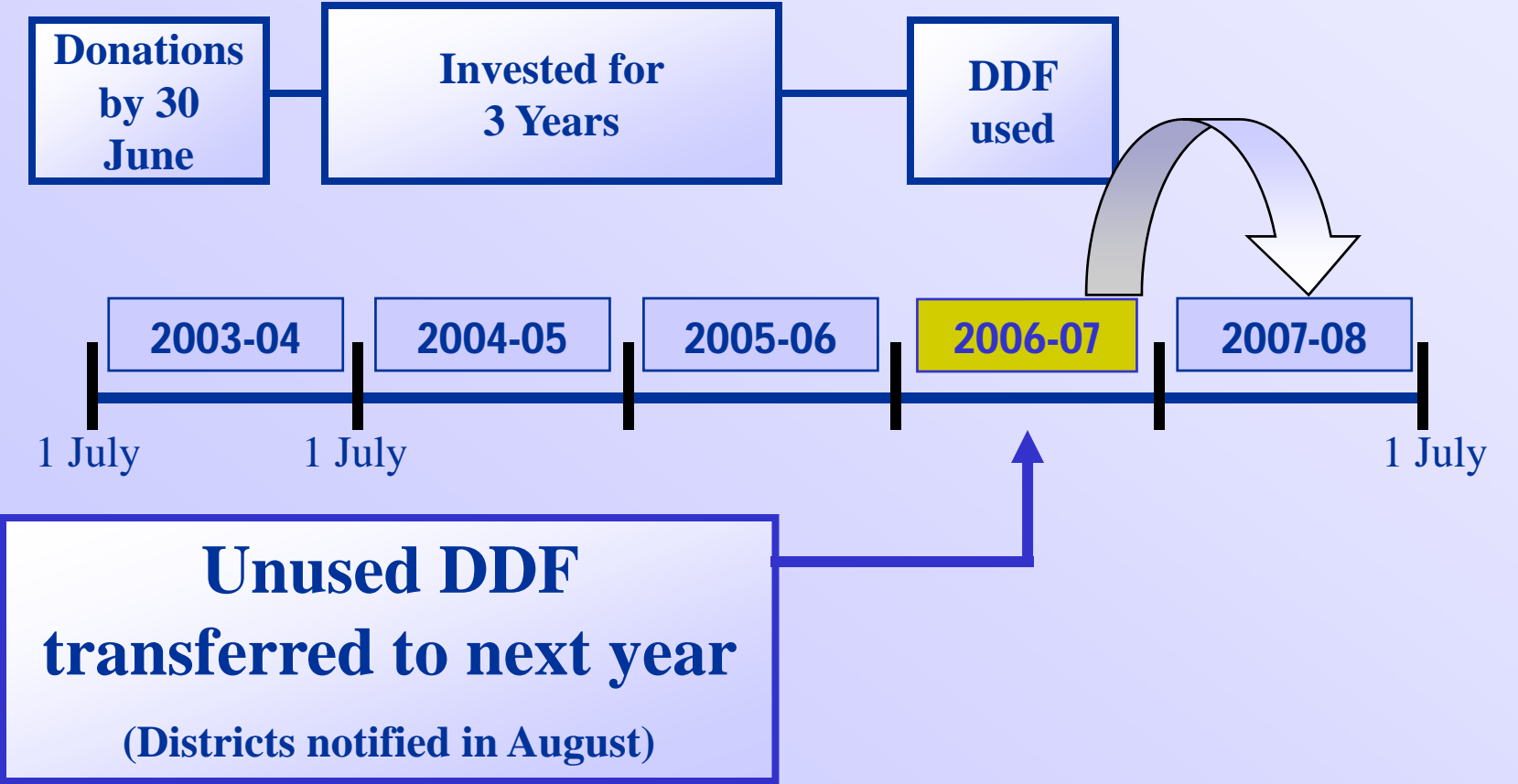
## How it works



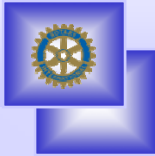
# SHARE



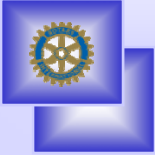
## How it works



# District Team



- District Governor
- District Rotary Foundation Committee Chair
- District Rotary Foundation Subcommittee Chairs
- District Governor-Elect
- Other knowledgeable Rotarians



# **Dr. Bill Cadwallader**

**Rotary International  
Past Director Zone 32**

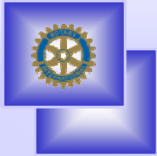
# TRF Programs:



## Educational Programs

- Ambassadorial Scholarships
- Group Study Exchange
- Rotary Centers for International Studies in Peace and Conflict Resolution
- Rotary Grants for University Teachers
- Rotary Peace and Conflict Studies program (at Chulalongkorn University, Thailand)

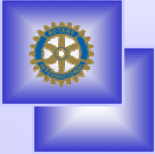
# TRF Programs: Group Study Exchange



The international exchange of young non-Rotarian professionals

- Teams spend 4 to 6 weeks abroad
- Districts can send teams every year using World Fund awards
- Variations include: Single-Vocation teams, Cultural teams, Humanitarian GSEs

# Rotary Centers



Master's degree program in fields related to peace studies and conflict resolution

- Focus on peace and conflict issues
- Advance knowledge and world understanding among potential world leaders
- Promote greater tolerance and cooperation among peoples

# TRF Programs: Peace and Conflict Studies



Peace studies, conflict resolution and mediation training at *Chulalongkorn University*, Thailand

- For middle and upper-level managers in government, non-governmental organizations, and private corporations
- 3-month program
- 30 students per session

# Humanitarian Programs



- Matching Grants
- District Simplified Grants
- Health, Hunger, and Humanity Grants (3-H)
- Volunteer Service Grants  
(formerly Individual Grants)

# Matching Grants



To assist Rotary clubs and districts in carrying out humanitarian projects

- Foundation match from World Fund
  - US \$0.50 match for every US \$1 cash contribution
  - US \$1 match for every US \$1 DDF (*SHARE*) contribution
- Applications accepted 1 July – 31 March

# Matching Grants



To assist Rotary clubs and districts in carrying out humanitarian projects

- Two grant types
  - Matching Grants: US \$5,000 - \$25,000
  - Competitive Matching Grants US \$25,001 - \$150,000

# Matching Grants



## General Guidelines

- Projects must involve active Rotarian participation
- Grants must address humanitarian need
- All grants must adhere to Terms and Conditions of Matching Grants Awards
- Reports due every 12 months

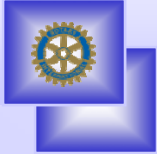
# District Simplified Grants



To support service projects in the local community or internationally

- One grant per year per district (can be used for multiple projects)
- Use 20% maximum DDF from 3 years prior
- For local or international use
- Reports due every 12 months
- Requests accepted 1 July – 31 March in Rotary Year prior to implementation of projects

# What is DDF?



- District Designated Fund
- 50% of district's total Annual Program Funds raised three years earlier
- Available for district use

# What is the World Fund?



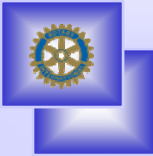
- 50% of district's total Annual Program Funds raised three years earlier
- Used for Rotary's match in Matching Grants, Individual Grants (currently in moratorium) and to send Group Study Exchange teams

# Volunteer Service Grants



- To support travel to plan and provide direct service
- Available to qualified Rotarians & Rotarian spouses
- Flat grant award
  - **US\$3,000 per individual or US\$6,000 per team of up to 5 mbrs**
- Applications received 3 months prior to departure and approved 2 months prior to departure
- Eligibility for traveler(s) based on:
  - **Defined community need**
  - **Need that can be met by skills & experience of traveler's)**
  - **Skills and experience not available locally**

# District Simplified Grants



## Important Criteria

- Grants over \$25,000: payment made in installments based upon spending plan
- Districts must provide progress reports delineating the expenditures before additional installments are made.

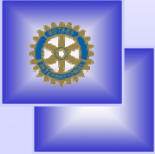
# 3-H Grants



Funds integrated long-term self-help, grassroots development projects

- Projects must be self-sustaining (after funds are spent)
- Sponsors have successfully worked together on a Matching Grant
- Sponsors provide minimum of 10% of award

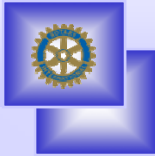
# PolioPlus



To protect children worldwide from the cruel and fatal consequences of polio

- 20 years of Rotarians' effort
- With 20 million volunteers
- In 200 countries
- Immunizing 2 billion children

# Global Eradication Initiative



## A public-private partnership led by:

- World Health Organization (WHO)
- Rotary International
- Centers for Disease Control and Prevention (CDC)
- United Nations Children's Fund (UNICEF)

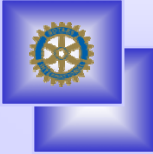


# Progress – then to now



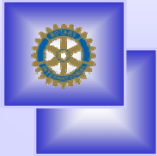
- In the 1980s, 1,000 children were infected by the disease every day in 125 countries. Today, polio cases have declined by 99%, with fewer than 2,000 cases reported in 2006. 2 billion children immunized, 5 million have been spared disability, over 250,000 polio deaths have been prevented.
  - ..... *only 4 countries remain endemic – India, Nigeria, Pakistan, Afghanistan-* each have infections of just one strain, monovalent (single virus strain)
- Over 99% reduction in cases since the beginning; 350,000 per year in 1985, <1000 reported last year.
- For each individual showing clinical signs of polio there are approximately 20 people carrying the virus.

# Polio Endemic Countries 2006

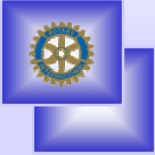


**4 endemic countries, the  
lowest in history**

# PolioPlus



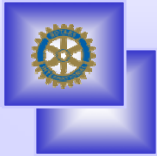
- What Can Rotarians Do?
  - Support a PolioPlus Partners Project
  - Highlight publicly the role of Rotary in the global eradication initiative
  - Schedule a club program on PolioPlus



# **John “Mac” Leask**

**Zone 31 Regional Rotary  
Foundation 2000-02 Coordinator**

# District Simplified Grants



- Utilize a portion of the district's DDF
  - 20% of new DDF
  - 1 grant per district per Rotary year
- Itemized and budgeted humanitarian good and services
  - Local community projects
  - International projects
- Direct Rotarian involvement

# Policies, Guidelines & Rotarian Involvement



- Adherence to standard grant policies
- Used only for eligible items/activities
- Respect wishes of receiving community
- Community needs assessment
- Project committee
- Project implementation
- Liaison with community leaders & beneficiaries
- Project promotion

# Request Procedure/Form



- Annual DSG Mailing
- Districts encouraged to submit requests in year prior to funds being spent
- Requests accepted: 1 July – 31 March
- Requests approved: 1 August – 15 May
- Amount requested
- DRFC chair and DGE authorization
- Payee Information (bank account)

# Payment Procedure



- Payment released at start of Rotary year
- 50% rule (previous DSG)
- Maximum of two paid open grants

# Grants Over US\$25,000



- Payment made in installments based upon a spending plan
- Subsequent payments released after progress reports are received
- Publicity plan required prior to payment
- Annual independent financial review

# Reporting Procedure / Reporting Content



- **PROCEDURE:** Progress reports at least every twelve months for the life of the grant
- Final report due within 2 months of completion
- **CONTENT:** Cumulative, district-level information
- Statement of income and expenses
- Bank statement
- Individual project reports that include itemized expenses.

# Stewardship



- Maintain accounting records
- Open separate bank account
- Keep receipts for at least five years
- ALL expenditures must be within TRF guidelines
  - No donations to existing projects or other organizations
  - No contributions to other TRF programs
  - When in doubt, refer to the Best Practices manual or consult with your Grants Coordinator

# Matching Grants



- Address humanitarian conditions that benefit a community in need
- Direct Rotarian involvement
- Match at least two countries (host and international)
- 1:1 match for DDF and 0.5:1 match for cash contributions

# Matching Grant Types



- Matching Grants
  - Award US\$ 5,000 - \$25,000
- Competitive Matching Grants
  - Award US\$ 25,001 - \$150,000

# Competitive Grants – Policies & Guidelines



- Community needs assessment
- Publicity and spending plan
- Annual independent financial review
- Adherence to Terms and Conditions of Matching Grant Award
- Must be humanitarian project
- Project must benefit a community in need

# Rotarian Involvement



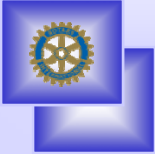
- Communicate with partners for life of project
- Establish committees (3 members) to oversee project
- Plan and implement project jointly
- Visit project site
- Submit reports to TRF
- Ensure proper stewardship of grant funds

# Application Procedure



1 July – 31 March	Applications accepted
1 August – 15 May	Applications approved
1 August & 1 January	Competitive Matching Grant application deadline

# Reporting Requirements



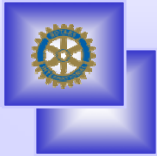
- Progress reports at least every twelve months for the life of the grant
- Final report due within two months of completion
- Primary report responsibility noted in application

# Report Content



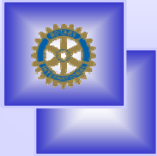
- Project accomplishments
- Rotarian involvement
- Information on the beneficiary
- Statement of income and expense
- Bank statement
- Certifying Signature

# Volunteer Service Grants



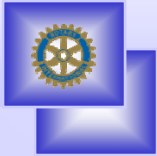
- International travel (individual or group)
  - Direct service
  - Planning projects
- Host and international partners
- Minimum stay: 5 days
- Maximum stay: 60 days

# Volunteer Service Grants



- Flat grant award
  - US\$3,000 for individual travel
  - US\$6,000 for group travel
- Maximum of two grants awarded to individual volunteer per Rotary year
- Project site may receive only one grant at a time (3 days overlap)

# Participant Qualifications



- Active Rotarians and spouses
- Eligibility
  - Defined community need
  - Need that can be met by traveler
  - Skills and experience of traveler not available locally

# Policies and Guidelines



- Adherence to standard grant policies
- Compliance with TRF travel insurance policies
- Eligible budget items
  - Economy class airfare
  - Minimal daily living expenses
  - Ancillary expenses
  - Remaining funds spent on project costs

# Role of Host Club & International Club

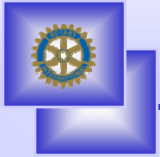


- HOST: Invite applicant
- Confirm need for skill/assistance
- Organize meetings with local officials
- Visit or volunteer at project
- Provide home hosting
- INT'L: Endorse applicant
- Communicate with host Rotarians
- Publicize project

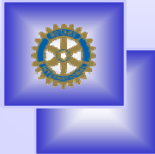
# Application Timeline & Reporting Procedures



- Applications accepted on rolling basis
  - Received 3 months prior to departure
  - Approved 2 months prior to departure
- Traveler submits final report upon return
- Host club submits post-service evaluation



EVERY  
ROTARIAN  
EVERY  
YEAR



# Goal Setting



## THE ROTARY FOUNDATION 2007-08 FUND DEVELOPMENT CLUB GOAL REPORT FORM

EN-(906)  
EVERY  
ROTARIAN  
EVERY  
YEAR

(Please return completed form to your district governor-elect by 1 May 2007)

Club Name (please print) \_\_\_\_\_ Club Number \_\_\_\_\_

Country \_\_\_\_\_ District \_\_\_\_\_

2007-08 Club President's Name (please print) \_\_\_\_\_

2007-08 Club President's Signature \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

### ANNUAL PROGRAMS FUND GOAL

Your Annual Programs Fund contributions support humanitarian, educational, and cultural programs both locally and internationally. Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals. Calculate your club's Annual Programs Fund goal by multiplying the number of members in your club by a per capita figure appropriate to your club.

# OF 2007-08 CLUB MEMBERS: \_\_\_\_\_

AVERAGE AMOUNT PER MEMBER: US\$ \_\_\_\_\_

**2007-08 APF-SHARE GOAL:** US\$ \_\_\_\_\_  
(Club members x per capita goal)

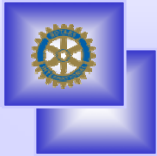
### PERMANENT FUND & MAJOR GIFTS GOALS

Indicate the number of club members interested in making an outright gift of US\$10,000 or more and those interested in including the Permanent Fund in their estate plan.

**Number of new Major Gifts:** \_\_\_\_\_  
(US\$10,000 or more outright)

**Number of new Benefactors:** \_\_\_\_\_  
(Minimum US\$1,000 outright gift or commitment in estate plan)

**Number of new Bequest Society Members:** \_\_\_\_\_  
(Minimum US\$10,000 commitment in estate plan)

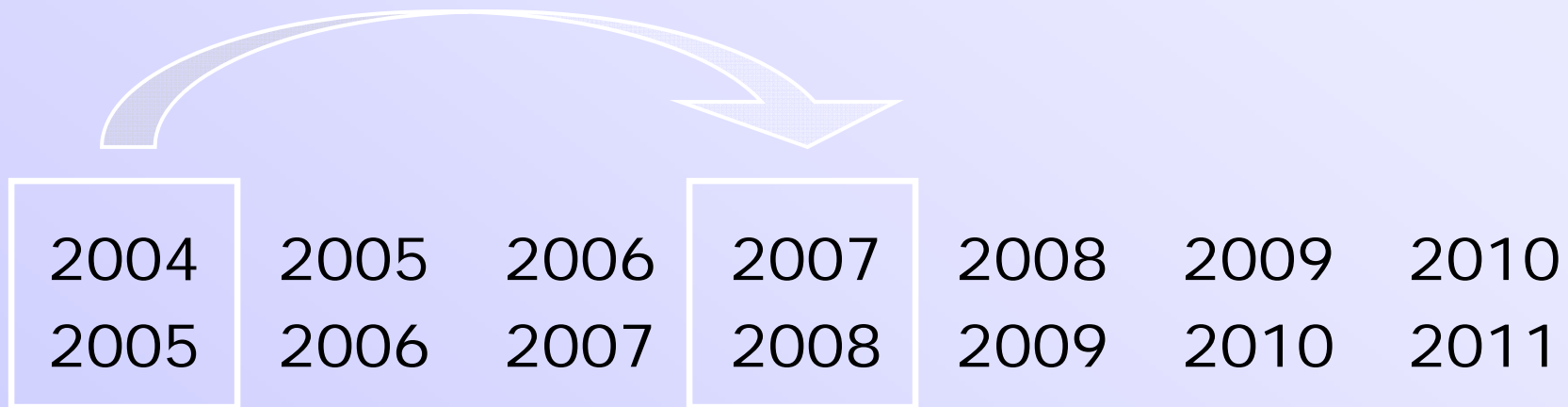
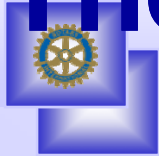


# Our Mission



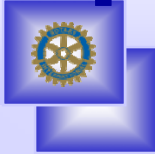
Enable Rotarians  
to advance world understanding,  
goodwill and peace  
through the improvement of health,  
the support of education,  
and the alleviation of poverty.

# The APF/SHARE 3-Year Cycle



- Contributions made to the Annual Programs fund in 2004-05 become available in 2007-08
- Contributions made in 2007-08 become available 2010-11

# Your Contribution at Work



Permanent Fund earnings  
also support the World Fund



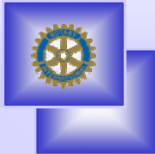
## 50% - District Designated Funds

- Matching Grants
- District Simplified Grants
- Ambassadorial Scholarships
- Rotary Centers
- Extra GSE Teams
- University Teacher Grants

## 50% - World Fund

- 3-H Grants
- One GSE Team per District each year
- Matching Grants (matches district and club input)
- Volunteer Service Grants

# Benefactor Recognition



A **Benefactor** is an individual or couple that has made a provision in their estate plan to gift a minimum \$1,000 to The Rotary Foundation.

*Your legacy will make a lasting difference in the world*

The Permanent Fund holds property in trust for the benefit of The Rotary Foundation of Rotary International by providing an extra stream of income to meet an increasing demand for the Foundation's educational, humanitarian, and cultural programs. My intent is to make an increasing gift to the Foundation by leaving a bequest in my will to provide an additional source of funds to help meet the globe.

A Benefactor of The Rotary Foundation is someone who bequeaths the Permanent Fund by making a provision in his or her will, or other estate plan, naming the Foundation's Permanent Fund as a beneficiary or executor and makes an outright gift of USD 1,000 or more to the Rotary Foundation Permanent Fund.

The Rotary Foundation solicits information about your bequest from which we will benefit in the future. We recognize the highly personal nature of these commitments. Only in the rarest of cases do we require a copy of your will. For estate recognition we will use the period's Personal Letter to the Benefactor's Family and a Post-Event Follow-Up plan. The Trustees are grateful for your gift and for your permission to publish your name as a Benefactor in their post-event legacy report.

www.rotary.org 149-EN-02/06

### BENEFACTOR GIFT COMMITMENT

I expect my gift will amount to US\$ \_\_\_\_\_

\*My commitment of USD 1,000 or more qualifies for membership in the top 100 legacy donors/committees in the country.

My Benefactor commitment to The Rotary Foundation's Permanent Fund will be in the form of:

Will Bequest  Other (please specify) \_\_\_\_\_

I designate that the spending period of \_\_\_\_\_ will be applied to:

The Trustee's Discretion (World Fund)  Through SFAME (Special Designated Fund and World Fund)

\*Should no dispositive bequest be named in this document, the gift will be made to the Rotary Foundation.

Name \_\_\_\_\_ Title \_\_\_\_\_ Rotary Club \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

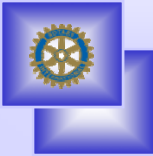
Telephone \_\_\_\_\_ E-mail \_\_\_\_\_ Date of Birth \_\_\_\_\_

Please return the bottom portion of this card to the appropriate address listed on reverse side.



Benefactor Commitment Card: 149-EN

# The Bequest Society



**Bequest Society** member is an individual or couple that has made a provision in their estate plan to gift a minimum \$10,000 to TRF.

Yes, I would like to become a member of The Rotary Foundation Bequest Society.

Name: \_\_\_\_\_  
(Please print your name in general in uppercase letters.)

This is a joint bequest and both spouses' names should appear on the report.

Address: \_\_\_\_\_  
(Please print and sign.)

District: \_\_\_\_\_ Rotary Club: \_\_\_\_\_

Date(s) of Birth: \_\_\_\_\_ (Spouse)

Telephone: (Home) \_\_\_\_\_ (Business) \_\_\_\_\_ (Other) \_\_\_\_\_

I designate that the spending portion of my gift will be applied:  
 to the Trustees' Discretion (World Fund)  through AMM (Discretion Designated Fund or World Fund)  
 to the Children's Fund (World Fund)

My Bequest will be funded by:  
 Cash  Savings Plan  Charitable Investment Account  Life Insurance  
 Other (Specify) \_\_\_\_\_

Amount of Bequest: \_\_\_\_\_ % and/or US\$ \_\_\_\_\_ to The Rotary Foundation.  
(Please state the amount in dollars to match the program code.)

Yes, The Rotary Foundation may publish my name in its compilation of names.  
 No, I would like my name withheld from all publications (including reports) and certain newspapers.  
 I have no preference.  
 Other \_\_\_\_\_

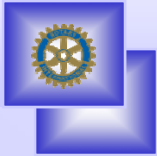
Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

The Rotary Foundation appreciates information about circumstances from which it will benefit in the future. We recognize the highly personal nature of these circumstances and assure that the details of your circumstances will be kept confidential.

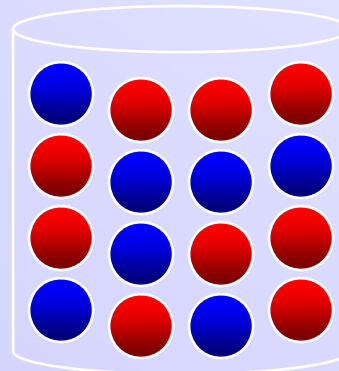
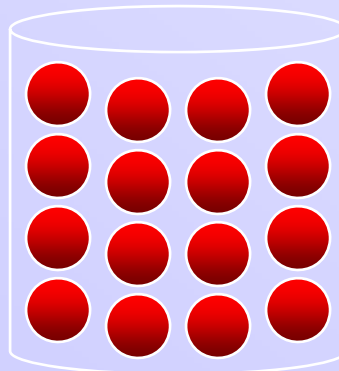
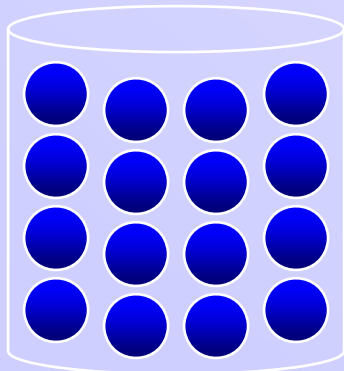


Bequest Society Membership Card: 098-EN

# Paul Harris Fellow



- The "magic" number for a PHF is 1000
- It can be **US\$1000**, **1000 Recognition Points** or a combination of both



# Understanding The Rotary Foundation



Questions? – to be answered  
in the breakout sessions!