The Rotary Foundation: 101

The "Basics" of our Foundation
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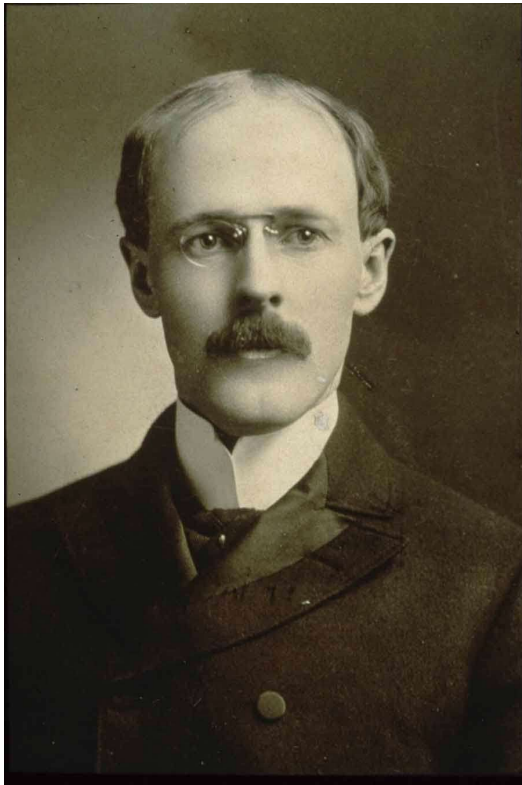
The Rotary Foundation

NOTE: For Presidents-Elect

- The Rotary Foundation is one of the top three Foundations IN THE WORLD!

- It is not your club's Foundation.

- You will need a Rotary Foundation Chair to successfully mange TRF business.

- Most clubs have a TRF Chair <u>and</u> a Chair of their club's Foundation.

- You may be confused by this presentation.

What is the The Rotary Foundation??

- Started in **1917** as an Endowment Fund by outgoing RI President Arch Klumph with $26.50 for "the purpose of doing good in the world."

- Renamed "**The Rotary Foundation**" in 1928 when total donations reached $5,000.

- Five trustees then made the first Foundation Grant of $500 to the International Society for Crippled Children (Easter Seals).

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Paul Harris Award

PAUL HARRIS circa 1896

- **Paul Harris**, Rotary's founder, died in 1947

- After his death, the **Paul Harris Memorial Fund** was created.

- Donations began to pour in after a long period of decreased donations to the Foundation during the Great Depression and World War II.

- The **Paul Harris Award** was then created to honor anyone who donated $1,000 to the Foundation (that's $11,000 in today's dollars!)

The Mission

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

The Foundation's Six Areas of Focus:

- *Peace and Conflict Prevention/Resolution*

- *Disease Prevention and Treatment*

- *Water and Sanitation*

- *Maternal and Child Health Care*

- *Education and Literacy*

- *Economic and Community Development*

A Short Video That Can Be Used at Your Club or Fundraiser

Summary Statistics

Contribution Summary	2017-18	Cumulative
Annual Fund	$131.4 million	$2.6 billion
Endowment Fund	$28.5 million	$348.6 million
PolioPlus Fund	$143.6 million	$1.5 billion
Other	$37.6 million	$194.4 million
Total Contributions	**$341.1 million**	**$4.7 billion**
Program Awards & Ops	**$302.7 million**	**$4.27 billion**

Total contributions / 1.2 million Rotarians = $284 each in 2017-18

Charity Navigator's 2018 list of the 10 Best

Rank	Charity	Score
1	Direct Relief	100.00
2	Map International	100.00
3	**The Rotary Foundation**	**100.00**
4	The Conservation Center	98.23
5	The Carter Center	97.87
6	Doctors Without Borders	97.23
7	Americares	97.23
8	National Countil of YMCA	97.17
9	Pationa Services Ind.	97.17
10	Catholic Medical Mission	96.63

Accounts for financial performance, transparency and accountability.

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Where Do My Donations Go?

Annual Program Fund (APF)

PolioPlus Fund

Endowment Fund

Annual Fund - SHARE

Start HERE: Assume $1 given to Annual Fund – SHARE program

50 cents invested in World Fund

50 cents invested for 3 years in District Designated Fund *(Query: why is it call District Designated Funds?)*

World Fund provides all necessary funding for Rotary's highest priority projects including Peace Fellowships, matching DDF, and other.

District Designated Fund split between Global Grants and District Grants

25 cents

25 cents

Minimum Global Grant project is $30,000

50 cents of global DDF for project (0.5:1)

Global Grant DDF matched by World Fund 25 cents into 50 cents (1:1)

DDF used for District grants under rules determined by each district.

Take Advantage of District Grants!

- Use District Grants to "match" your club's own cash contribution to a project.

- Your club must have met the qualifying amount of $100 per capita giving, and have no outstanding paperwork on previous grant projects.

- The application for District Grants is painfully simple.

- The District Grants Committee, chaired by Barry Thompson, is looking for projects to meet any of the six areas of focus, engage Rotarians, be sustainable and be promotable.

- If you partner with other Rotary clubs, you can leverage the total grant size.

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PolioPlus

- Rotarians have given over 2 billion polio vaccines to children worldwide at a cost of only about **60 cents** per vaccine.

- Partnered with World Health Organization, UNICEF, and Centers for Disease Control.

- Co-sponsored by more than **$500 million** in Matching Grants from the Bill and Melinda Gates Foundation.

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PolioPlus

- ***RIGHT NOW – 2 for 1 Matching Funds up to Rotary's $50 million continuing over the next two years** available from the Gates Foundation for every dollar donated to Polio Plus!

- Most effective public health program in history.

- **1988 – 350,000 cases of polio in 125 countries**.

- **2018 – 39 cases** of WPV worldwide reported in **only 3 endemic countries.**

What's the "Plus" All About?

PolioPlus donations have also provided funding to develop:

- An established "Cold Chain" for manufacturing and immediate delivery of immunizations in underdeveloped countries that also include: Measles, Diphtheria, Whooping Cough, and Tetanus.

- An established delivery network for other community heath needs, such as vitamin A supplements.

- Network of laboratories and Public Health Clinics to monitor and treat disease and serve public health needs.

These "plusses" will stay in place to serve countries and communities long after Polio is eradicated!

Learn More About Rotary and Polio Eradication

- Dare to Dream, How Rotary Became the Heart and Soul of Polio Eradication

- Go to www.daretodreamfilm.com for free trailer – FREE club program!

- 56- minute full-length documentary

- Polio fundraiser:

  - Cost to buy $25 (equals $19 to PolioPlus)

  - Cost to rent $4.99

- Owned by District 7620 Project Trust Fund

Rotary Endowment Fund

- A permanent fund meant to fund the future of Rotary.

- Principal of gifts to Endowment Fund is never spent and only a portion of the earnings.

- Useful for including the Rotary Foundation in your estate plan.

- Value of $1 billion + of current assets and promised commitments.

Levels of Foundation Support and Recognition

- Sustaining Member:

  - Donate at least **$100 per year** to the Foundation and/or PolioPlus.

  - Easy to give regular donations by enrolling in the **Recurring Giving Program** online!

  - All donations accumulate towards a Paul Harris Fellow Award.
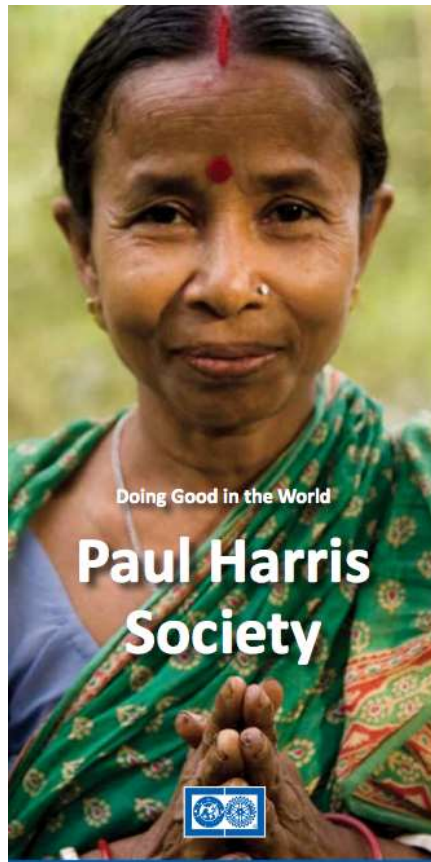
EVERY ROTARIAN EVERY YEAR

Levels of Foundation Support and Recognition

- Paul Harris Fellow

  - **Paul Harris Fellow recognition** is given to any Rotarian for a $1,000 donation to the Foundation (one time donation or cumulative donations).

  - Donor receives a Paul Harris pin, pendant and certificate.

  - Donors can receive recognition as **Multiple Paul Harris Fellows** (new pins) for their further support of the Foundation.

  - Paul Harris Fellow awards can also be given in other ways to **non-Rotarians**, including family members or deserving members of the community.

Levels of Foundation Support and Recognition

- Paul Harris Society
  - Pledge and donate **$1,000 per year** to the Foundation.
  - **That's less than $20 per week!** (about the cost of one cup of good coffee per day....)
  - Donations go to the Annual Fund (SHARE), PolioPlus or can be designated donations.
  - Pledge form can be obtained from your club president, foundation chairperson or downloaded from the RI website.

Levels of Foundation Support and Recognition

- **Foundation Major Donor**

  - Anyone who has donated $10,000 or more to the Foundation.

  - Major Donors receive a crystal recognition piece and a Major Donor pin.

  - Four levels of Major Donors, up to donations of $250,000.

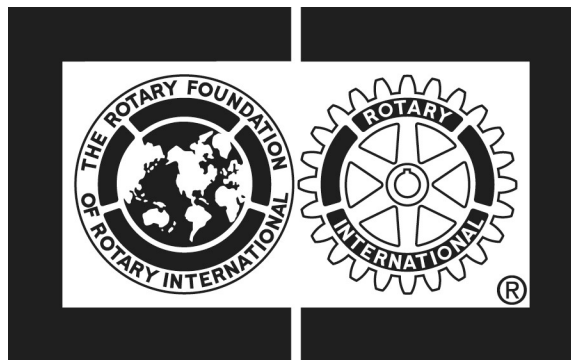 - Donors who have given $250,000 or more become members of the Arch C. Klumph Society.

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Levels of Foundation Support and Recognition

- Foundation Benefactor

  - Donate at least $1,000 to the **Foundation's Endowment Fund**.

    - OR

  - Make the Foundation Endowment Fund a **beneficiary in your will.**

  - Only the interest and dividends are used for Foundation sponsored programs or operation expenses.

Levels of Foundation Support and Recognition

- Foundation Bequest Society
  - Become a member by making a commitment of **$10,000** or more from:
    - Your estate,
    - Living will, or
    - Life Insurance Policy

How Do I Donate to the Rotary Foundation?

It's Easy!!!

- Make out a check to *"The Rotary Foundation"* and give to your club President or Foundation Chair, anytime!
    - OR

- Go online to **rotary.org** and login to *My Rotary*. Click on "DONATE." You can then *donate with a credit card online, and....*

How Do I Donate to the Rotary Foundation?

Enroll in Recurring Giving Online!

- When you donate online, choose any amount, method of giving and the frequency of giving for your recurring donation.

- Choose SHARE or **any** of the Foundation's Programs, Six Areas of Focus, PolioPlus, etc.

- Makes it **easy** to be a **Sustaining Member** or to become a **Paul Harris Fellow**.

- Allows **Paul Harris Society** members to simplify giving by choosing the time of the their donation every year.

Enroll in recurring giving

EVERY ROTARIAN EVERY YEAR

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Rotary Club Central

- Start developing your Foundation giving goals now for SHARE and PolioPlus.

- Discuss with your club's TRF chair, club board, and members.

- Don't be a chicken...infuse your club with a lofty vision.

- Make certain to post them online at Rotary Club Central.

You can make

a difference

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