

PETS 2012: The Rotary Foundation

(Total Time: 60 Minutes)

Discussion Leader Notes

- **Pre-arrange your flip chart(s)/slides and markers to a location that you are comfortable with**
 - **Introduce yourself to the group and explain your role as a resource and facilitator of their discussion; you may wish to greet each participant individually as they enter and find a seat**
 - **Discuss your expectations and group guidelines (such as taking turns speaking, welcoming and accepting all questions/comments, and asking the group to turn off all cell phones)**
 - **Review the session's learning objectives with the participants (HINT: Have the preprinted flip charts for this session near you and be familiar with their content)**
 - **Encourage them to take notes and to get to know each other; try to gauge the participants' knowledge and Rotary experience and adjust the facilitated discussions accordingly**
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Learning Objectives (Refer to your flip chart)

At the end of this session, participants will be able to:

- 1. Identify the programs and activities of The Rotary Foundation**
- 2. Understand how to support and communicate Foundation programs**
- 3. Lead the club in establishing Foundation goals**
- 4. Be exposed to/understand the Future Vision Plan**

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If you haven't already done so, please distribute PETS 2012 Rotary Foundation Handout #1 at this time. A copy is NEXT.

The Rotary Foundation – Handout #1

(Beginning of Session)

- **YOU have an *IMPORTANT ROLE* to play as Club President in supporting the Rotary Foundation (YOUR foundation)!**
- **What is the best resource for helping you and your club achieve (or surpass) its Rotary Foundation goals? (Hint: it's a very key club committee)**
- **How would you rate/assess your personal knowledge of the programs and initiatives of the Rotary Foundation:**
 - A. Strong?
 - B. Pretty good?
 - C. Average?
 - D. Not sure?
 - E. (Hint: *There's a message here: both you and your club's Foundation Committee should be knowledgeable!*)
- **Could your club benefit by “discovering” an international humanitarian project and applying for a Matching Grant to assist your club's efforts? (Hint: Look for answers here today)**
- **Have you heard about *The Rotary Foundation Future Vision Plan*?**
- **What will be YOUR legacy of *leadership* and *support* for the Rotary Foundation? It begins TODAY here at Carolinas' PETS!**

My Notes & Follow-up Items:

Programs of The Rotary Foundation (20 Minutes)

Q. Who can share a personal story about your experience with a Rotary Foundation program?

Discussion Leader Notes

- If presidents-elect do not volunteer to share personal stories, be prepared to share your own personal story/experience
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Key Points (Refer to your flip chart)

- The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. The Rotary Foundation's motto is *Doing Good in the World*.
- Foundation programs are supported solely by *voluntary* contributions from Rotarians and friends of the Foundation who share its vision of a better world.

Q. What are the 3 main program areas of The Rotary Foundation?

Key Points (Refer to your flip chart)

- The Rotary Foundation has three main program areas:
 - PolioPlus
 - Educational Programs
 - Humanitarian Grants Programs
- Each program has specific eligibility criteria and application forms, which are available through the RI Catalog (019), from the district Rotary Foundation committee, or at www.rotary.org

NEXT: Refer to WORKSHEET 17 (Handout)

Group Activity

Discussion Leader Notes

- Allow 15 minutes for this activity
- Ask participants to review Worksheet 17 for 2 minutes on their own. Form 3 groups – each GROUP will complete the worksheet page that corresponds to one of the 3 Rotary Foundation program areas (Educational, Humanitarian Grants, or PolioPlus)
- Allow 8-10 minutes for each group to answer the discussion questions that correspond to each program
- For the last 5 minutes of the activity, have each group briefly report on its discussion and answers

Q. Who will you work with to carry out your club's Foundation Goal?

Key Points

- The club Rotary Foundation committee:
 - Is the primary resource for helping clubs achieve Foundation goals
 - Helps create awareness and should provide ongoing Foundation information to educate Rotarians
 - Develops and carries out plans to support the The Rotary Foundation through financial contributions and club participation in Foundation programs

Discussion Leader Note

- Here is a potential *GROUP flip chart* opportunity.

Q. How will YOU support your club's Foundation Committee?

Some Potential Responses:

- *Meet with the club's Foundation Committee at the beginning of the term to help assess current annual and long-range Foundation goals*

- *Help encourage club participation in Foundation giving and programs; lead by personal example and encourage your Board of Directors to also lead by example*
- *Support Foundation programs that offer opportunities for involvement and membership retention*
- *Promote contributions from club members*
- *Identify what resources are available to help the club participate in Foundation programs*
- *Ensure that the club committee is working with the district's Rotary Foundation Committee*
- *Attend and encourage attendance at district Rotary Foundation seminars and other related events*

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Supporting Rotary Foundation Programs (20 Minutes)

Q. What do the primary programs of The Rotary Foundation cover and how do they work?

Key Points (Refer to your flip chart)

- **PolioPlus is the corporate program of Rotary International and supports the immunization activities of Rotary International and the other major partners of the Global Polio Eradication Initiative (the World Health Organization, UNICEF, and the U.S. Centers for Disease Control).**
- **The Annual Programs Fund and the Permanent Fund are the sources of funding for the programs of The Rotary Foundation.**
- **Annual Programs Funds are invested for 3 years. The earnings from this investment cycle are used to cover administrative expenses.**
- **Each district's Annual Program Fund contributions for a Rotary year are equally split into the District Designated Funds and the World Fund.**
- **Districts use their District Designated Funds to participate in Foundation programs of their choice.**
- **The World Fund pays for programs for which every district may apply, such as Group Study Exchanges and Matching Grants.**

- The Permanent Fund is the Foundation’s endowment. The principal is never spent, and a portion of the earnings is used each year to help pay for programs.

Q. Is there a Foundation form that the President-Elect must complete?

Discussion Leader Notes

- Yes, *The Rotary Foundation Fund Development Club Goal Report Form*. A copy of this form is provided for each president-elect in the PETS materials sent to the governor elect. Club presidents-elect report their club’s goals to the governor-elect by completing this form which covers:
 - Annual Programs Fund goals
 - Permanent Fund goals
 - Polio fundraising
- This form should be completed during this meeting or at a time set by the governor-elect.

Q. What does “Every Rotarian, Every Year” mean to your club?

Sample Responses

- *Every Rotarian makes a contribution to the Foundation’s Annual Programs Fund every year*
- *Every child has the opportunity to learn to read and write*
- *Every community has clean water*
- *Every person lives in a polio-free world*

Q. What is your role in “Every Rotarian, Every Year”?

Sample Responses

- *Make a gift to the Foundation early in the Rotary year*
- *Encourage your club officers and club members to make a gift every year*
- *Provide periodic reminders of EREY*
- *Inform members of how their contributions to the Annual Programs Fund support Foundation programs that achieve good in the world*

- *Recognize Rotarians who support The Rotary Foundation; make the recognitions special (and often as reminders to other Rotarians)*

Q. Have you set the fundraising goals for your club?

Key Points (Refer to your flip chart)

- **The worldwide Annual Programs Fund goal is an accumulation of club goals.**
- **To establish an Annual Programs Fund goal, club presidents-elect should examine the club's previous giving to the Foundation and determine a challenging goal.**
- **The Annual Programs Fund goal is also a pledge from Rotarians to make the world a better place.**

Q. How will your club raise funds to end polio?

Q. Why is stewardship of RI funds important?

Key Points (Refer to your flip chart)

- **The funds that support Rotary Foundation programs and grants were donated by you and fellow Rotarians.**
- **Humanitarian grant project participants must manage the funds received from the Rotary Foundation responsibly and with full disclosure.**
- **Stewardship includes project planning, submission of completed and accurate applications, direct Rotarian involvement, transparency in all financial transactions, and effective/timely reporting.**
- **Transparency and proper use of Foundation funds help build confidence in The Rotary Foundation as a worthy and effective charitable organization.**

Q. How can the district Rotary Foundation Seminar help your club achieve its Foundation goals?

Sample Responses

- *The district Rotary Foundation Seminar provides an opportunity to:*
 - *Share goals for the coming Rotary year*
 - *Introduce newer Rotarians to The Rotary Foundation and reacquaint other Rotarians about the work of the Foundation in the district and around the world*
 - *Learn about resources, other club fund-raising ideas, and tools to motivate Rotarians to support The Rotary Foundation*
 - *Understand the importance of financial support of Foundation programs*

Future Vision Plan (5-6 Minutes)

Q. What have you heard about The Rotary Foundation Future Vision Plan?

Sample Response

- *The Rotary Foundation is testing a new grant model that will carry the Foundation into the next century. There will be only two grant types: Rotary Foundation District Grants and Rotary Foundation Global Grants.*
- *Rotary Foundation District Grants are block grants made to districts to support smaller projects both locally and internationally. Districts may use up to 50 percent of their available District Designated Fund for these grants in a given Rotary year and administer the grants without the Foundation's involvement*
- *Rotary Foundation Global Grants support larger projects with sustainable, high impact outcomes in one of six areas of focus. These grants would be administered by the Foundation in a manner similar to the current system.*

Key Points (Refer to your flip chart)

The six areas of focus for the Global Grants are:

- **Peace and conflict prevention/resolution**
- **Disease prevention and treatment**

- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

Q. What are the benefits of the Future Vision Plan?

Key Points (Refer to your flip chart)

- The new grant model will:
 - Simplify processes
 - Expand service opportunities
 - Build a stronger sense of ownership among Rotarians for their Foundation
 - Increase the collective impact of grants by concentrating more on the areas of focus
- More information about The Rotary Foundation's *Future Vision Plan* is found in the Club President's Manual, Pages 90-91

Q. What other resources are available to you?

Key Points (Refer to your flip chart)

- Rotary Foundation resources include:
 - District Rotary Foundation chair and committee
 - District governor and assistant governors
 - Regional Rotary Foundation coordinator
 - Rotary Foundation staff at RI World Headquarters
- The following are suggested as informational club resources:
 - *The Rotary Foundation Quick Reference Guide*
 - *Every Rotarian, Every Year Club Success Kit*
 - Contact.center@rotary.org
 - EXCELLENT, additional information is found in the *Club Rotary Foundation Committee Manual, a part of the Club Officers' Kit*

Please distribute PETS 2012 Rotary Foundation Handout #2 at this time. A copy follows on the NEXT page in your notes.

The Rotary Foundation – Handout #2

(End of Session)

- **Have you looked back at your club's history of supporting the Rotary Foundation?**
- **Are there any "trends" or "patterns" of support for the Rotary Foundation in your club's history? Would you be proud of what you discovered?**
- **Would a stronger emphasis on recognizing those from your club who support the Rotary Foundation help you in achieving your Foundation goals? (Hint: Ask your *Governor* to join you in presenting new Paul Harris Fellow and Foundation Benefactor, etc., recognitions; make the recognition *very special!*)**
- **Have you asked your club's Rotary Foundation Committees to set a goal for your year of leadership and report back? (Hint: Ask all of your key committees to propose annual goals and get your club to adopt them!)**
- **Would a regular Club Assembly about the programs and great work of *your* Rotary Foundation assist you and your club in achieving your Foundation support goals? (Hint: Yes!)**
- **What does the phrase "*Every Rotarian, Every Year*" mean to you and your club?**

My Notes & Follow-up Items:

Review

- **Review the Learning Objectives to ensure that all topics were covered sufficiently. Answer any questions and let the participants know how to contact you if they have questions later (Your contact information is contained within the 2012 Carolinas' PETS Program).**
- **Ask participants to share something that they learned during the session and an action they will take as a result of this session. Participants can share with the person next to them or with the entire group.**
- **THANK THE GROUP**