

Carolinas' PETS 2020: YOUR Rotary Foundation

(Total Time: 60 Minutes)

Discussion Leader Notes

- ***Smile: Plan your “engagement” plan! (Note: This session has an IMPORTANT “Best Practices” Grid in the Discussion Materials)***
- ***Pre-arrange the location of your BLANK flip chart***
- ***Introduce yourself to the group and explain your role as the 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 (see below and your notes)***
- ***Encourage participants to take notes; try to gauge the participants’ knowledge and Rotary experience and adjust the facilitated discussions accordingly***

Session Opening

Learning Objectives

Review with group (in Discussion Materials)

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

- 1. Identify the six Causes of The Rotary Foundation and how they relate to Rotary Foundation grants***
- 2. Understand how your club can benefit from District Grants and participate in Global Grants***
- 3. Identify the “best practices” of clubs that successfully grow member support and contributions to The Rotary Foundation***
- 4. Understand how to use historical club contribution data to set reasonable goals for both Annual Fund and PolioPlus fundraising***
- 5. Understand how to use available informational and District resources to educate members on The Rotary Foundation's goals, accomplishments and value as their "charity of choice"***

If you haven't already done so, please POINT OUT the PETS 2020 "Your Rotary Foundation" Best Practices Grid at the end of the Discussion Materials

SHARE YOUR BEST PRACTICES

<u>Motto & Mission</u>	<u>6 Causes</u>
<u>How are Grants Initiated?</u>	<u>Types of Grants</u>
<u>Foundation Committee, Personal and Board Example</u>	<u>Promoting YOUR Foundation</u>
<u>Recognizing Members for Their Foundation Support</u>	<u>Goal Setting</u>

YOUR Rotary Foundation

INITIAL DL TALKING POINTS: (5 Minutes)

- ***YOU have an IMPORTANT ROLE to play as Club President in supporting the Rotary Foundation (It's 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 Rotary Foundation Committee (not just the Foundation Chair) should be knowledgeable!)***
- ***Could your club benefit by "discovering" an international humanitarian project and by applying for a District or Global Grant to assist your club's efforts? (Hint: Look for answers here today. Ideas can be found at <http://ideas.rotary.org>)***
- ***Are Rotarians the only source of funding for The Rotary Foundation?***
- ***Do you understand how the Foundation makes grants?***
- ***What will be **YOUR** legacy of leadership and support for the Rotary Foundation?***

Programs of the Rotary Foundation (12-15 Minutes)

Q. How well do your club members “connect” with the Rotary Foundation? Your success stories and feedback will be very helpful here!

Discussion Leader Notes

- *If presidents-elect do not volunteer to share personal stories, be prepared to share your own personal story/experience*
-

Talking Points (COVER THESE 2 POINTS)

- *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 Rotary Foundation’s 6 Causes?

Key Points

The Rotary Foundation has 6 specific Causes (formerly Areas of Focus):
[\(<https://www.rotary.org/en/learning-reference/about-rotary/areas-focus>\)](https://www.rotary.org/en/learning-reference/about-rotary/areas-focus)

- *Promoting Peace*
- *Fighting Disease*
- *Providing Clean Water*
- *Saving Mothers and Children*
- *Supporting Education*
- *Growing Local Economies*

Q. Why are these areas SO important to us as Rotarians?

Discussion Leader Notes

Your role here is to help the Presidents-Elect understand WHY we have these specific causes and why they are important as we serve humanity

Q. What are the big differences between The Rotary Foundation and other charitable foundations?

Discussion Leader Notes

Contributors to most charities have neither control of nor knowledge of where the money goes. The Rotary Foundation does its work entirely through Rotarians and Rotary clubs -- people who know where local needs are and know what will work to solve them. TRF Grants are created and managed by Rotarians.

Key Points

- **Grants from the Rotary Foundation are initiated by**
 - **A Rotarian who sees a community need and creates a solution**
 - **A Rotary club that supports the project**
 - **Rotarians who agree to execute the project**

Then,

 - **The Rotary Foundation funds the project**
 - **The Rotarians monitor, evaluate, and report on the project**

- **Available funds for both District and Global Grants are based on the DISTRICT's TRF contributions (from 3 years prior)**

- **Grants from The Rotary Foundation are initiated and directed by Rotarians, Rotary clubs and Rotary Districts. Therefore:**
 - **You know where your contributions are going**
 - **Rotarians "have your back" on the project**
 - **Required reporting ensures funds are spent as intended**

Q. Where do The Rotary Foundation's Grants come from and how do they work?

The Rotary Foundation District Grants are block grants made to districts to support smaller projects both locally and internationally. District grants are funded solely by District Designated Funds (DDF) generated from a district's Annual Fund giving from three years prior, and Endowment Fund SHARE earnings.

Districts may use up to 50 percent of their available DDF for these grants in each Rotary year and administer the grants without the Foundation's involvement. Specific district criteria are covered at the District Foundation Grants Seminar (different than the Foundation Seminar). Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district- or club-sponsored projects. In addition:

- **All activities funded with district grant funds must adhere the terms and conditions for Rotary Foundation grants**
- **Districts must be qualified by the Foundation to receive district grant funds**
- **Districts can set their own criteria for district grants and clubs must comply with such criteria in order to qualify to receive grants**
- **Activities are NOT required to support the 6 Causes**

Rotary Foundation Global Grants support larger projects (greater than \$30k USD) with sustainable, high impact outcomes in one of six causes (formerly Areas of Focus). These grants are administered by the Foundation. Applications are entered via the Grants Tool in MyRotary.

Global Grants utilize the other 50 percent of their (DDF)

- **All activities funded with Global Grant funds must adhere to the terms and conditions for Rotary Foundation grants**
- **Clubs and Districts must be qualified by the Foundation to receive grant funds**
- **Activities ARE required to support 1 or more of the 6 Causes**

Club- and district-developed global grants

Clubs and districts can use District Designated Fund (DDF) or cash contributions to fund global grant activities and get matching funds from the Foundation. When developing activities, clubs and districts should consider the following:

- **Activities must be sustainable and measurable. For example:**
 - **How will a project benefit the selected community in the future, after the grant has been spent?**
 - **How will a scholar's studies support one or more of the 6 Causes?**
 - **How will a vocational training team project support capacity building, either for the team or the benefiting community?**

- **Activities should stem from real community needs. Assessment tools are available to help identify community needs. Global grants must be sponsored by two Rotary clubs or districts: a host partner in the country where the activity takes place and an international partner outside the country. NOTE: Think about how we in the USA can be the host partner to do a project in our country and partnering with a Rotary club from another country.**
- **Both partners must be actively involved in the planning and implementation of all global grants. This includes maintaining communication and developing plans for the shared responsibilities in all the grant's stages.**

Q. HOW will you engage your club to achieve your club's Rotary Foundation Goal?

Key Points

- **AN ESSENTIAL RESOURCE is your club's Rotary Foundation committee:**
 - **Helps create awareness/inspiration and should provide ongoing Foundation information to educate Rotarians**
 - **Is a proven "Best Practice" of successful Rotary clubs Develops and carries out plans to support the The Rotary Foundation's Programs through club participation and financial contributions**
Reminder: Impact Drives Income (in other words, the results of TRF-funded projects drive contributions -- not the other way around)

Discussion Leader Note

- **Here is an optional/potential GROUP DISCUSSION TOPIC:**

Q. As President, HOW will YOU support your club's Rotary Foundation Committee?

Some Potential Responses:

- **Learn the requirements and application process for District Grants and apply for a grant for one of your club's projects BEFORE your term as President. IMPORTANT: Grants for your year will be made BEFORE July 1. Get a grant application underway ASAP if not already in process.**
- **Meet with the club's Foundation Committee (include the future club presidents too) BEFORE and DURING your term of leadership to review current and long-term Foundation goals and their achievement**

- ***Attend and encourage attendance at your district Rotary Foundation seminars and other related events***
- ***Help encourage club participation in Foundation giving and programs; lead by personal example and encourage your Board of Directors to also lead by example***
- ***Inspire 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***

Supporting Rotary Foundation Programs (12-15 Minutes)

What are the key programs of your Rotary Foundation and how do they work?

Talking Points (Look for these ideas!)

- ***The eradication of Polio (aka PolioPlus) is the highest priority “program” of Rotary International and supports the immunization activities of Rotary International and the other major partners of the Global Polio Eradication Initiative (GPEI) --(the Bill & Melinda Gates Foundation, the World Health Organization, UNICEF, and the U.S. Centers for Disease Control***
- ***PolioPlus is a separate fund of TRF, administered by the GPEI***
- ***The Annual Fund and the Endowment Fund are the sources of funding for the District and club-directed programs of The Rotary Foundation***
- ***Annual Funds are invested for 3 years. The earnings from this investment cycle are used to cover administrative expenses.***
- ***Each district's Annual 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 Scholarships, Vocational Training Teams, and Global Grants***
- ***The Endowment Fund is held in perpetuity. The principal is never spent, and a portion of the earnings is used each year to help pay for programs (like the Peace Fellows Program).***

Promoting Rotary Foundation Giving (12-15 Minutes)

Q. Are there Foundation goals that the President-Elect must complete?

Discussion Leader Notes

- **All of you should be entering your Foundation goals via Rotary Club Central. <http://www.rotary.org/clubcentral> Your club Foundation goals include:**
 - **Annual Fund goals**
 - **Endowment Fund goals**
 - **Polio Plus fundraising**
- **Be sure that YOU understand the use of Club Central the benefits to your club!**

Q. What are the Donor Recognition Levels of The Rotary Foundation?

- **Paul Harris Fellow (PHF) \$1,000 lifetime contribution**
- **Sustaining Member \$100/year**
- **Paul Harris Society \$1,000/year**
- **Multiple Paul Harris Fellow Add'l. \$1,000 increments -- PHF +1, PHF +2, etc.**
- **Major Donor \$10,000 lifetime contribution (Level 1)**
- **\$25,000 (Level 2)**
- **\$50,000 (Level 3)**
- **\$100,000 (Level 4)**
- **Arch Klumph Society \$250,000 minimum (multiple levels)**

Q. What is your role in giving to The Rotary Foundation?

Sample Responses

- **Make YOUR personal gift to the Foundation early in the Rotary year**
- **Encourage your club officers and club members to make a gift every year (Lead by your example!)**
- **Provide periodic reminders of gifting to The Rotary Foundation**
- **Inform members of how their contributions to the Annual 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)**
- **Sign up for Rotary Direct and give on a recurring basis via your credit card**

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

Talking Points (Look for these ideas!)

- **To establish an Annual Fund goal, using data from My Rotary (Club Fundraising Analysis), presidents-elect should examine the club's previous giving to the Foundation and determine a realistic, yet challenging goal**
- **The Annual Fund goal is also a pledge from Rotarians to make the world a better place**
- **To establish a PolioPlus goal, using data from My Rotary (PolioPlus Report), club presidents-elect should examine the club's previous giving to the Foundation and determine a realistic, yet challenging goal**
- **The Rotary Foundation is the "engine" for "Doing Good in the World"**

Q. Why is stewardship of TRF funds important?

Talking Points (Look for these ideas!)

- **The funds that support Rotary Foundation programs and grants were donated by yourself 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 many of you have attended your district's Rotary Foundation Seminar? 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***
 - ***Discover opportunities to PARTNER with other clubs in both local and international service projects***
 - ***Introduce newer Rotarians to The Rotary Foundation and acquaint 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***

DL Note: There are several excellent Rotary Foundation resources prepared and available for you listed in the Discussion Materials.

Q. What are some of YOUR club's "Best Practices" regarding the Rotary Foundation?

Talking Points (Look for the ideas BELOW!)

Rotary Foundation Club "Best Practices"

- **Utilize Public Image and social media to increase giving to TRF**
- **Establish/strengthen your club's Rotary Foundation Committee**
- **Plan a club program about the Rotary Foundation every quarter (especially in October for World Polio Day, in November, Rotary Foundation Month, and in February for Rotary's birthday)**
- **Include a brief story about The Rotary Foundation in every club program (e.g., a "Foundation Minute")**
- **Schedule presentations that inform club members (especially new members) about your Rotary Foundation**
- **Promote contributions from club members**
 - **Include recommended Sustaining Member contribution (\$100/year or \$25/quarter) on dues invoice**
 - **Paul Harris Level Point Match offers**
 - **Rotary Direct -- Regular contributions via bank draft or credit card**
- **Ensure that your club is well-represented (by YOURSELF, your Foundation Committee Chair and Foundation Committee members at the district Foundation events)**
- **Seek out ways to use and participate in Rotary Foundation Grants**
- **Recognize (warmly, publicly, and often) club members' financial contributions to TRF and their participation in Foundation programs; make recognitions special! (Example: Invite your Governor to present new Paul Harris Fellow recognitions)**
- **Help club members understand the relationship between Foundation giving and Foundation grants/programs**

DL Session Wrap-Up & Review (3-4 Minutes)

- **Have you looked back at your club's history of supporting the Rotary Foundation?**
HINT: The Club Fundraising Analysis is the most comprehensive report available from TRF. Ask your District Foundation Chair, Club Foundation Chair, President or Secretary to run it for you.

IMPORTANT SHORTCUT: tinyurl.com/PETSFoundationReports
- **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? What can you do now to grow and promote your club's support of the "heart" of Rotary, The Rotary Foundation?**
- **Would a stronger emphasis on INDIVIDUALLY recognizing those from your club who support the Rotary Foundation help you in achieving your Foundation goals? (Hint: Again, ask your District Governor to join you in presenting new Paul Harris Fellow and Foundation Benefactor, etc., recognitions; make these recognitions very special!)**
- **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" REALLY mean to you and your club?**
- **What is YOUR personal goal to support The Rotary Foundation?**
- **DL: 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 _____.**
- **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**
- **END OF SESSION**

YOUR ROTARY FOUNDATION

DISCUSSION MATERIALS

&

ROTARY REFERENCES

