

The Rotary Foundation

Club Rotary Foundation

Committee Guide

The Rotary Foundation of Rotary International



Introduction

In November 2004, the RI Board agreed that every club should have, as part of its standing committees, a Rotary Foundation Committee. This guide is intended to help clubs organize their support for The Rotary Foundation. It outlines the role of the Club Rotary Foundation Committee and the responsibilities of the club Foundation chair.

The key element is educating club members about The Rotary Foundation, and involving the club in Foundation projects.

When Rotarians learn about their Foundation and learn about the international service accomplished with the assistance of Foundation programs, they support their Foundation, both financially and with their time and talent.

The Rotary Foundation gratefully acknowledges past regional Rotary Foundation coordinator John M. Leask Jr. for his invaluable contributions in preparing this guide.

Role of the Club Rotary Foundation Committee Chair

The club Foundation chair is expected to:

- Help the Rotary club and its president to achieve his or her goals
- Help educate and train club members about the Foundation
- Encourage club members to participate in Foundation programs and support the Foundation financially
- Communicate the Foundation goals of the district, zone, and Trustees to the club and its members
- Ensure the Foundation goals are reported in accordance with the schedule provided at PETS

Educating Rotary club members about the Foundation is a critically important role. The more individual club members know about the Foundation the more they will want to participate in its programs and the more likely they are to financially support its programs. The Foundation strongly encourages clubs to have well-trained, enthusiastic, knowledgeable, and respected Rotarians serve as the club's Foundation chair.

A Foundation program can be successful only if it is embraced and actively supported by Rotary club members. It is unrealistic to expect Rotarians to participate in and financially support the Foundation's programs unless they understand how these programs save and change lives, and benefit them and their Rotary club in the process.

The club Foundation chair links club members to the district governor and his or her Foundation team, the regional Rotary Foundation coordinator, and the Foundation Trustees.

To be successful, the club Foundation chair must become the expert on The Rotary Foundation. Each club

Foundation chair must understand the Trustees' and district governor's goals and how they fit with the club's goals.

The club Foundation chair must also be a Foundation trainer and salesperson. He or she must know where to find Foundation resources and how to get answers to questions club members may have. The chair should look for ways to support the club president's goals.

The club Foundation chair is a part of a Foundation team that includes the district Foundation leadership, regional Rotary Foundation coordinator, Annual Programs Fund strategic advisers, Major Gift advisers, Rotary Foundation alumni coordinators, and Foundation staff.

Educating the Club Rotarian

A significant increase in club support for The Rotary Foundation will not happen unless each club member understands Foundation programs and the tremendous return that results from investing in our Foundation. Four ways to educate club Rotarians are:

1. Good, interesting club programs on the Foundation
2. Member participation in Foundation programs
3. Weekly Rotary Foundation Thought
4. Attendance at Foundation seminars and other events

Good, interesting club programs on the Foundation bring home the power and benefits of the Foundation's programs by putting a human face on what TRF does to save and change lives. The best club Foundation programs spotlight the experiences of Foundation alumni: Group Study Exchange team members, former and current Ambassadorial Scholars or Rotary World Peace Fellows, University Teachers, and participants in the Humanitarian Grants Program. Before the presentation, the introduction of the speaker or speakers should briefly explain their connection to the Foundation. During the presentation, the speaker should focus on how the activity saved and changed lives. After the presentation, the attendees should be briefly told how the Foundation sup-

ported the program. Club members should then be asked to support the Foundation's Annual Programs Fund to help make possible the kinds of programs just featured.

One club program each year should present a general Foundation overview and update club members on current Foundation activities. It should not be a lecture but follow a discussion leader format, presenting a mixture of new information in short vignettes and questions about the information covered. More interesting than a lecture, this "tell a little, ask a little" format will keep club members actively engaged in the presentation and increase retention.

Presentations on the Foundation often focus on the features and details of its programs. Instead, presentations should highlight the benefits to Rotarians and Rotary clubs as well as to those served that result from participating in or supporting the Foundation. These presentations should demonstrate the tremendous return that results from investing in our Rotary Foundation because of the hands-on work of Rotarians who add their time and resources to the dollars provided by the Foundation. At the conclusion of each program there should be a call for action.

Videos and pamphlets are available through the online catalog at www.rotary.org that can help supplement information provided during Foundation presentations.

Encouraging club member participation in Foundation programs is a principal responsibility of each club Foundation chair. There is no better way to demonstrate the effect of Foundation programs than to get members involved in them. Each club Foundation chair must have a good understanding of the opportunities to serve through our Foundation's programs and the benefits of such service to their club.

Many Foundation programs available at the district level can directly benefit each Rotary club's community without costing the club anything more than time and creativity. Each educational program available should be publicized and promoted in the community by every

means possible. Here are programs that can bring significant grants to members of your community if they are available in your district:

- Ambassadorial Scholarships
- Group Study Exchange
- Rotary Grants for University Teachers
- Rotary World Peace Fellowships

It is important that the club Foundation chair know which Educational Programs are available in the district and how to recruit candidates from the community. This information is available from the district's Foundation leadership, at the annual district assembly and district Foundation seminars, and frequently on district web sites. Additional information on these programs is available on the RI Web site at www.rotary.org.

The club Foundation chair should be familiar with these Humanitarian Grants Programs:

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

A Rotary club may use these programs to assist its community, vocational, or international service efforts. When properly publicized, participation in Foundation programs often attracts new members to the club.

The club Foundation chair should understand the concepts of these programs, which are available from the district, and when to apply. The district Foundation grants subcommittee chair and the other chairs can answer questions about program features and help with applications. They may even provide workshops to help the club Foundation chair. The district grants subcommittee has direct responsibility for certifying that grant applications are complete and in most districts will help Rotary clubs prepare their applications. Regional Rotary Foundation coordinators also provide training on the Foundation and its programs.

Weekly Rotary Foundation Thought: Taking two to three minutes at the start of each Rotary club meeting to show how the Foundation saves and changes lives can be a powerful way to tell the Foundation's story to club Rotarians. It is important to make the Rotary Foundation Thought interesting and exciting. However, if only one Rotarian tells the Foundation's story each week, club members may stop listening. Responsibility for it should rotate among a group of Rotarians so the membership hears Foundation stories told in different ways with varying emphasis. This can be done either by choosing several Rotarians to share the responsibility or sharing it with the entire club.

If the entire club shares responsibility for the Foundation Thought, those Rotarians unfamiliar with the Foundation must take time to learn a little about it to tell its story. Over time, the club can reach a consensus about which Foundation programs most interest its membership.

Sharing responsibility with the entire club can result in inconsistent, uninteresting presentations, unless the club Foundation chair actively coaches the Rotarians assigned each week's Foundation Thought. A form can be used to be sure Rotarians understand what is intended and where to find information about the Foundation (see sample on page 12). A few days before the club meeting, the club Foundation chair should remind the person assigned of his or her responsibility, be sure the person is on the right track, and encourage him or her to make the presentation interesting and to bring a written version for the club newsletter editor to include in the next issue. Promoted with enthusiasm, the Foundation Thought can be a powerful tool for spreading the exciting story of The Rotary Foundation.

Attending Foundation Seminars: Every district is encouraged to hold a Rotary Foundation seminar. The district Foundation committee and district governor are responsible for conducting a seminar to inform and inspire Rotarians about participating in the Foundation.

The club Foundation chair should attend this seminar and encourage other club members to do so as well. In addition, the club may wish to hold its own Foundation seminar. PowerPoint presentations are available from the Foundation that can be used. Also, the club Foundation chair should call upon the RRFC for assistance. The RRFC may be able to attend, or can help design the program. A sample club Foundation seminar agenda is included on page 13.

A club Foundation seminar might include the following:

- *Overview of the Foundation:* This should be a broad overview of the Foundation's programs focusing on their benefits instead of features, and include how program funds are raised and used.
- *The role of The Rotary Foundation chair:* This should be based on the Club Foundation Chair Job Description and Wish List, pages 9-11. It should include how our Foundation's programs can help the club president, international service chair, and even community service chair. It should share actual experiences of successful club Foundation chairs.
- *The Matching Grants program:* This segment should demonstrate how to use the Matching Grants program for an international service project. It should explain the club's role as a host or sponsor club participating in a Matching Grant and how to find its counterpart. It should focus on the benefits of these programs to Rotarians and Rotary clubs, not just the programs' rules and features. It should also explain who at the district level is available to help with program applications and rules.
- *District Simplified Grants:* This segment should demonstrate how the District Simplified Grants (DSGs) program can be used and should only be included if the district has applied for a DSG. It should explain who at the district level is available to help with program applications and rules.
- *Individual Grants:* This should explain how the Individual Grants program can be used to help the

Rotary club while helping qualified individuals to save and change lives across the world. It should focus on program benefits, not just rules and features.

- *Educational Programs:* This should focus on how to promote Educational Programs in the club's community and how to find candidates. It should emphasize the benefits of these programs to program grant recipients and how these programs help the Rotary club and Rotarians achieve our Foundation's objectives.
- *Raising money for the Foundation:* This should focus on successful strategies for promoting the Every Rotarian, Every Year effort.
- *Finding help for the club Foundation chair with programs, district support, zone support, and RI support:* These short segments should focus on where the club Foundation chair can find support and assistance.
- *Donor recognition and understanding club Foundation reports:* This program should focus on how the club Foundation chair can read Foundation reports, such as the Club Recognition Summary, and use them to monitor giving; how club members can use Member Access; how the Foundation chair can teach members to use Member Access; and how recognition can encourage giving.

Raising Funds for The Rotary Foundation

The club Foundation chair is responsible for developing, organizing, and coordinating the fundraising effort for The Rotary Foundation to support its Annual Programs Fund and Permanent Fund. The Annual Programs Fund is the lifeblood that supports the Foundation's educational and humanitarian programs. The Permanent Fund is the Foundation's endowment fund. In addition, the PolioPlus Fund is used solely for Rotary's effort to eradicate polio worldwide.

Giving is frequently an emotional decision, rather than a logical one. Rotarians who have participated in the Foundation's programs and those who have seen firsthand how the Foundation saves and changes lives are more likely to support the Foundation. That's why pro-

viding education about the Foundation and encouraging participation in its programs are such important parts of the club Foundation chair's role.

Every Rotarian, Every Year is the current initiative to increase support for the Annual Programs Fund. The club Foundation chair should work with the club president and club Foundation committee to organize and coordinate the club's Annual Programs Fund campaign. As this campaign develops during the year, the club Foundation chair should obtain the Monthly Club Recognition Summary from the club president or secretary to track the club's annual giving. The chair should teach club members how to use Member Access on the RI Web site to be sure Rotary accurately records each member's contributions to the Foundation. The chair should determine how to best encourage Every Rotarian, Every Year in the club. Periodically, the chair should measure progress and adjust strategies as needed. Those who give should be recognized and encouraged in a way that fits the club's culture.

Resources Available to the Club Foundation Chair

- The Rotary Foundation's pages on the RI Web site, www.rotary.org, for up-to-date information on all Foundation activities
- The Foundation's section of the Download Center on www.rotary.org, for program applications, program terms and conditions, and manuals
- The district Foundation chair and subcommittee chairs
- *District Rotary Foundation Committee Manual* (300-EN) at the Download Center on www.rotary.org
- *Club President's Manual* (222-EN) at the Download Center on www.rotary.org
- Publications, videos, DVDs, and public service announcements which can be found in the print version of the *RI Catalog* or the online version on www.rotary.org

- Past program participants (Foundation alumni) willing to share their experience — a list can be requested from alumni@rotaryintl.org
- The club's assistant governor
- The club's district governor or a knowledgeable past district governor
- The regional Rotary Foundation coordinator
- The Rotary Foundation part of your zone Web site

Club Foundation Chair Job Description

Objectives:

- Help the Rotary club and its president to achieve club goals
- Encourage every Rotarian to contribute to The Rotary Foundation every year
- Encourage the club to participate in a Foundation program
- Communicate to the club's members the goals of the district, zone, and Rotary Foundation Trustees
- Educate and motivate the club about Foundation programs

Duties:

- Help the club to understand The Rotary Foundation and what opportunities for international and community service are available through the Foundation's programs, which save and change lives
- Assist the club's international and community service chairs as appropriate when the Foundation's programs can help them accomplish their goals
- Work with the club program chair to organize exciting presentations on the Foundation
- Conduct a club Foundation seminar to help educate club members about the Foundation
- Encourage and organize a Foundation Thought at each club meeting

- Help the president-elect establish the club goal and ensure it is reported on time
- Monitor the activities of the district Foundation committees and the Foundation so the club will know about, understand, and participate in district Foundation-related activities
- Attend district meetings and seminars on the Foundation and encourage other Rotarians to do so, to take information and ideas for service back to their Rotary clubs
- Provide articles on our Foundation for the club's newsletter and encourage others to do the same
- With the help of the club president or secretary, obtain and review copies of the Foundation Monthly Club Recognition Summary and use it to monitor giving and assist the club and its members to maintain accurate records of contributions and Paul Harris Fellow credits
- Teach club members how to use Member Access available at www.rotary.org to monitor their individual giving

Wish List of Possible Activities

This list suggests ways the club Foundation chair can help the club president plan and successfully complete his or her year.

- Educate each club member about the opportunities for service through the Foundation.
- Help the club's program chair to organize at least one program each quarter, during regular club meetings, on the Foundation and its activities.
- Organize the club's celebration of Rotary Foundation Month in November, including extra programs on the Foundation.
- During the year, work with the club's international and community service chairs to help them achieve their goals through Foundation programs and resources where possible and appropriate.

- Alert the club president to district and RI resources that can enhance the club's programs and solve problems or help the president achieve the club's goals.
- Provide information from the Foundation and RI about the options for service through Foundation programs.
- Be familiar with the *RI Catalog*, available at <http://shop.rotary.org/catalog>, and advise the club about its use and value.
- Encourage every Rotarian in the club to contribute what he or she can afford to give each year to the Foundation.
- Encourage every Rotarian to become a Rotary Foundation Sustaining Member (in supporting the Every Rotarian, Every Year effort) and ultimately a Paul Harris Fellow.
- Promote the Foundation's Permanent Fund to those club members who can afford to become Benefactors, Bequest Society Members, and/or Major Donors as appropriate.
- Assist the Foundation Trustees, district governor, and district Foundation chair in achieving their Foundation goals.
- Attend and encourage others to attend district and regional Foundation seminars and dinners, or when not possible to be present, send a substitute.
- Promote the district assembly, Foundation dinner, Foundation seminars, Group Study Exchange activities, recruitment of Ambassadorial Scholars and Rotary World Peace Fellows, and participation in other district programs or Foundation events and fundraising activities.
- Offer the district governor, district Foundation chair, and other district Foundation subcommittee chairs advice as appropriate.
- Maintain regular contact with the district Foundation chair and various Foundation subcommittee chairs.

Weekly Rotary Foundation Thought

Name: _____

Your assigned date: _____

WHAT: Show club members how The Rotary Foundation saves and changes lives by sharing information and stories about its impact around the world. Demonstrate how each of us, as individual Rotarians, save and change lives with our efforts, time, and financial contributions.

WHO: Assign a different Rotarian every week, circulating through the entire membership, so that every club member has an opportunity to share his or her thoughts.

If you are unable to attend a meeting, please:

1. Trade days with another Rotarian
2. Be sure he or she has this form
3. Tell club Foundation chair (phone or e-mail)

WHEN: Rotary Foundation Thoughts are to be presented at every regular Rotary club meeting.

HOW LONG: 2-3 minutes

WHERE TO FIND FOUNDATION INFORMATION:

- *The Rotarian* magazine
- The RI Web site (go to www.rotary.org, then click on The Rotary Foundation.)
- Personal stories (e.g., Rotary Volunteers in the club)
- Stories you have heard from other Rotary clubs
- Rotarians who have participated in a Foundation program (GSE, Matching Grant)
- Ask yourself when YOU realized the impact of The Rotary Foundation!
- Write a brief summary of your presentation to be put in the newsletter under "Rotary Foundation Thought"

Please give this completed form to the newsletter editor for the week or club Foundation chair at the end of the meeting.

Thank you!

Club Rotary Foundation Chairs Seminar: Sample Agenda

Intended Audience: Club Foundation chairs, club presidents and presidents-elect, international service chairs, community service chairs, members interested in Foundation programs, assistant governors

Requirements:

- Room setup in classroom style
- Name badges and tent cards
- Screen, overhead projector, two flip charts, markers
- Podium with microphone, two portable microphones, if possible

0800	Registration & Coffee
0830	Introductions
0840	Why Are We Here?
0850	Rotary Foundation of Rotary International — Overview
1000	Role of the Club Rotary Foundation Chair How Our Rotary Foundation Can Help the Club President, International Service Chairs, and Community Service Chairs
1030	Matching Grants and District Simplified Grants — Tools for the Club
1100	Break
1110	Ensuring Proper Use of Foundation Funds
1130	Promoting Educational Programs in Your Community
1200	Raising Funds from Rotarians for the Foundation (EREY)
1230	Luncheon Buffet

1300	Keynote Address (During Lunch)
1330	Effective Use of Foundation Alumni
1350	Where to Find a Good Program
1355	District Support for the Club Foundation Chair
1400	Zone and RI Support for the Club Foundation Chair
1410	Recognition and Reading Club Foundation Reports
1430	Questions and Answers
1455	Inspirational Remarks in Summary
1500	Adjournment



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