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November 5, 2019

Dear Club Leaders:

We are now in the fifth month of the Rotary year. For those of you – most of you – who are new to your position as club president or Rotary Foundation chair, I say congratulations on taking on this role and I hope you are finding it a rewarding year. I am the district's TRF Fund Development Chair.

You know that TRF is the vital engine that drives our humanitarian work around the world. Did you know that the independent charity review organization Charity Navigator (www.charitynavigator.org) gives TRF **100 out of 100** rating for financial performance, transparency, and accountability? Only a tiny fraction of the thousands of charities rated by Charity Navigator have earned that score – and your Foundation is one of them! And we as donors have the power to direct much of the funds raised to humanitarian projects that we conceive and execute. Please stress this to your members. Our contributions are investments in the work of Rotarians locally and around the world, and as such they are investments in Rotary itself.

We continue to ask that Rotarians commit to contributing at least \$1 per day – less than a cup of coffee anywhere – to The Rotary Foundation. Most of us can easily do it, some can do more, and over 320 District 5950 Rotarians have joined the Paul Harris Society, pledging to contribute at least \$1,000 per year as long as they are able. For your information, the per capita giving in our district last year was an outstanding \$272

We are in a robust and growing economy, and most of us can afford to set aside one dollar a day, and I know there are many others who can afford to contribute \$1,000 per year. But whether or not you can afford the \$1,000 per year or the \$1 per day, whatever you *can* afford is what we ask of EVERY ROTARIAN, EVERY YEAR.

It is vitally important that club leaders lead the way in both themselves contributing to TRF and in having a specific campaign at some time during the year (generally a 30-60 day period) when TRF is emphasized and pledges or contributions are received. Some suggestions are attached to this letter in the document entitled "Suggested Annual Fund Campaign."

I want you to know that I and the district TRF team are here to help you in your TRF fundraising activities as the year progresses. My contact information is above – please feel free to call me and let me know how I can help.

Here are some of the ways we can help you in your efforts on behalf of TRF:

- Presentation to your club. We have several district leaders available and eager to come to your club to present a program on TRF. If I've personally presented to your club in a previous year, I'm happy to come again, or maybe you'd rather have a different speaker this time, and we can arrange that too!
- Help with your own presentation. Some clubs prefer to have their own TRF program presented by their members rather than district leaders. We can help with that as well. PowerPoint slides, general information, ideas for topics – we can help with all of those.
- Information. If questions come up outside of a program (i.e. recognition point issues, information about how TRF money is spent, etc.) please feel free to send me an email or pick up the phone and give me a call. If I don't have the information, I can get it for you.
- Materials. Rotary produces many helpful pieces of literature, which are available on line. If you need help retrieving these materials, let me know and I can help.
- Matching point program. Did you know that the District has a Matching Point Program for first time donors to the TRF Annual Fund? Information on this program is available on the district website (Rotary5950.org) or contact me for information.

Let's make this a stellar Rotary year for our clubs, district and The Rotary Foundation. Hope you all have a happy Thanksgiving!

Yours in Rotary service,

s/ Jim Nelson

Jim Nelson, PDG

Cc: District Governor Russ Michaletz
District Rotary Foundation Chair Carol MacDonald

P.S. Presidents, please be sure your TRF chair is listed as such on the District ClubRunner site, so he or she gets communications re TRF. If you don't HAVE a TRF chair – you need one! Find a committed Rotarian to lead the charge on this critical piece of your Rotary year.

SUGGESTED ANNUAL FUND CAMPAIGN

The month many clubs consider for their Annual Fund campaign is November, which is Rotary International's Foundation Month and also close to the calendar year-end when many people are considering their tax-deductible contributions for the year. Other clubs prefer to run their campaign a little later in the Rotary year. Whichever month you choose, we have found that a concentrated campaign that lasts only one month is a very effective approach. Here is a suggested timeline for using that type of campaign.

WEEK ONE

- (1) **Kick-off** - This is your kick-off week so plan a kickoff event. One idea is to have a cocktail hour or buffet to which you invite all club members and their spouses/partners to honor the club's Paul Harris Fellows and hand out PHF awards. Invite club alumni and past PHF recipients. You should have a program scheduled for that week's club meeting and consider using a District speaker to come in and help make the opening pitch for Annual Fund contributions. Another option is to schedule the evening event in lieu of your regular meeting that week (especially if you can save money by cancelling the regular meeting and use the savings to pay for or subsidize the evening event). Either way, a good approach is to demonstrate with concrete examples the impact TRF contributions have had in your community or elsewhere in the world as a result of your club's projects.
- (2) **Pledge forms** - This is the week to hand out pledge forms to all members. The best practice is to have the pledge forms individually addressed and include the member's contribution from the prior year so they can see what they have contributed before. Any club member who is not at the meeting to get his or her pledge should receive it by email and/or regular mail the same day. A sample form is attached. This is just a suggestion; use this, modify it, or use whatever other form would work best for your club.
- (3) **Everyone gives a pledge** - Set the expectation that every club member returns the pledge form by the end of the month. That should be a firm date by which you get in all pledges. Even if they are only going to pledge \$25, get them to return a pledge form.
- (4) **Goals** - Communicate your goals. The hardest thing for most Foundation Chairs is to make "the ask" for money which is a good reason to bring in someone from the District. The District ask is a minimum \$365 per member. That's only one dollar per day! If you ask club members to donate at least that much, you may be surprised by the results!
- (5) **Paul Harris Society (PHS) Members - Carolyn Pratt**, the District Paul Harris Society Chair, will send you names of potential PHS members in your Club. Contact Carolyn for further assistance and ideas on recruiting new Paul Harris Society members: 952-835-2975 or

carolynsings@hotmail.com.

WEEK TWO

- (1) **What's your progress** - Make an announcement at the Club meeting telling everyone the results from Week 1 in terms of the number of pledges returned and the dollar amount pledged so far.
- (2) **Everyone gives a pledge** - Reinforce that everyone needs to have his/her pledge turned in by the end of the month.
- (3) **Reminders** - Send out an email to all members to remind them of pledges, goals etc., so that you catch anyone who didn't make the Week One meeting. In the email, specifically request the pledge by the end of the month and ask them to consider digging deep for a contribution of \$365 or more this year.

WEEK THREE

- (1) **What's your progress** - Again, make an announcement at the Club meeting telling everyone the results from Week 2 in terms of the number of pledges returned and the dollar amount pledged so far.
- (2) **Everyone gives a pledge** - Reinforce that everyone needs to have his/her pledges turned in by the end of the month. You want to create the sense of a timeline with an end-date that is approaching so people will take action.
- (3) **Almost done** - Send out an email only to those members who have not given you pledges to let them know they are only one out of X number of members who still haven't turned in a pledge. In the email, again specifically request the pledge by the end of the month and ask them to consider digging deep for a contribution of \$365 or more this year.

WEEK FOUR

- (1) **Results to date** - Again, make an announcement at the Club meeting telling everyone the results from Week 3 in terms of the number of pledges returned and the dollar amount pledged so far. Announce the results and let everyone know how many members have not turned in their pledges.
- (2) **Get help to chase the holdouts** - Let the club know you will be contacting any hold-outs directly and consider asking other Rotarians who are part of Club Leadership to discreetly assist you.
- (3) **Almost Done.** Send out an email to and call those members who have not given you pledges to let them know they are one out of X number of members who still haven't turned in a pledge. Ask them for a specific commitment on when they will return their pledge.
- (4) **Celebrate your success** - Your campaign is over, now it's just a matter of tracking the contributions as they come in to make sure the pledges are paid by June 15 (because TRF closes the books on June 30). Thank your club members profusely and consider special recognition where and when appropriate.

FOLLOW-UP

- (1) Use a spreadsheet to track pledges and payments and to use as a basis for next year's campaign.
- (2) Be ready to a report at year-end on total giving, comparison to your goals and comparison to other clubs in your district.

OTHER IDEAS

- **Team captains.** Consider using a team captain approach. This "deputizes" a high number of strong leaders in the Club. Have them do the contacting and "asking" for 8-10 members. You can divide the teams into two main teams for friendly rivalry between two longtime Foundation Chairs. The immediate past Club president serves as honorary chair, adding another strong and familiar leader to the campaign.
- **Past successes.** Consult with prior Foundation chairs – in your clubs or in other clubs in the District – about past successful Foundation campaigns.
- **Help from your District Rotarians.** The District Rotary Foundation Committee (DRFC) can offer programs and other assistance on various Foundation related subjects. Feel free to call on any of them for assistance. Primary contacts are:
 - District Governor, Russ Michaletz, rvmichaletz@gmail.com
 - District Rotary Foundation Chair: Carol MacDonald, carol@rotary5950.org
 - District TRF Fund Development/Annual Fund Chair: Jim Nelson, rotary5950jim@gmail.com
 - Polio Plus Chair: Tim Mulcrone, timmulcrone@aol.com
 - Paul Harris Society Chair: Carolyn Pratt, carolynsings@hotmail.com
 - Bequest Society/Major Gifts Chair: Mark Hegstrom, rotarymarkhegstrom@gmail.com

_____ **Rotary Club**
The Rotary Foundation of Rotary International Annual
Campaign 2019-2020 Pledge Form

District 5950 has asked each Rotarian to donate at least \$1 per day (\$365 annually) in support of the fundamental mission of Rotary.

Name: _____

(My **2018-2019** TRF contribution was: \$ _____)

I hereby pledge \$ _____ to my club's **2019-2020** Rotary Foundation Annual Campaign. (Please consider increasing your contribution over last year's.)

I will pay my pledge (check one):

_____ My check is attached. (*Make check out to The Rotary Foundation.*)

_____ Add to Dues (The amount pledged will be divided evenly and invoiced on your remaining periodic dues statements for this Rotary year.)

_____ I prefer to make my contribution through Rotary Direct (www.rotary.org.)

Questions? Contact: _____
Ph: _____