




Paul Harris, a Chicago attorney formed the Rotary Club of Chicago in 1905, so professionals with diverse backgrounds could exchange ideas and form meaningful, lifelong friendships.

THE ROTARY FOUNDATION (TRF)

Rotary Club of Hilo Bay





At the 1917 convention, outgoing Rotary President Arch Klumph proposed an endowment for doing good. The Rotary Club of Kansas City, Missouri, made the first donation of \$26.50.



AGENDA

FOCUS ON TECHNICAL ASPECT OF THE ROTARY FOUNDATION

- A glance at the Rotary Foundation
- Foundation funding and fundraising
- Supporting the rotary foundation
- Annual fund
- SHARE process
- D5000 allocation rules
- Our achievements and goals of contributions to TRF

CONGRATULATIONS!

FOR FOUNDATION RECOGNITION POINT TRANSFER OFFERED BY SHARON SCHEELE

Deborah Beaver

Emmeline dePillis

Jo-Anna Herkes

Kevin Hopkins

Irene Nagao

Suzanne Robotham

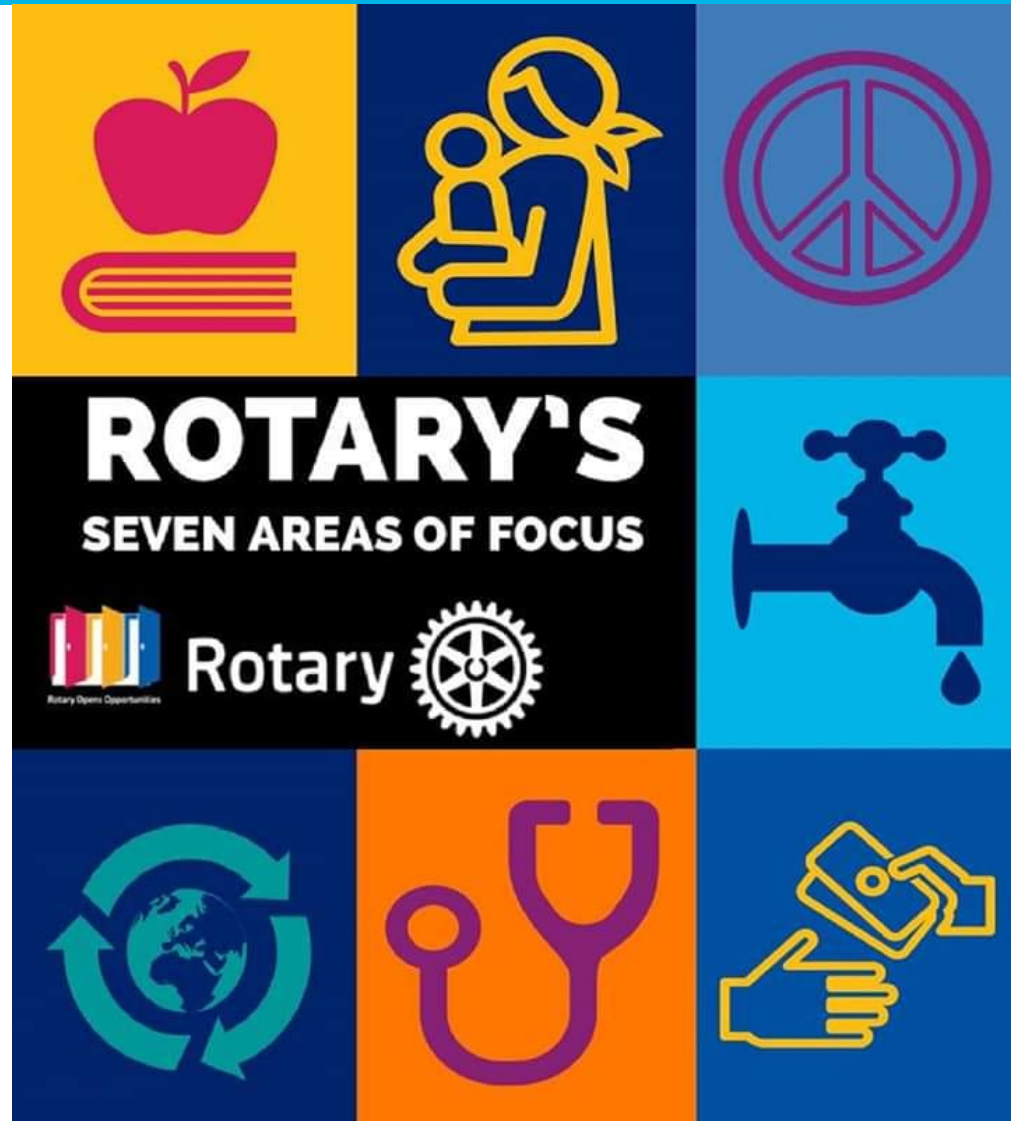
Gary Young

A Glance at The Rotary Foundation

SEVEN (NOT SIX!) AREAS OF FOCUS

- Peace and conflict prevention/resolution.
- Disease prevention and treatment.
- Water and sanitation.
- Maternal and child health.
- Basic education and literacy.
- Economic and community development.
- The Environment.

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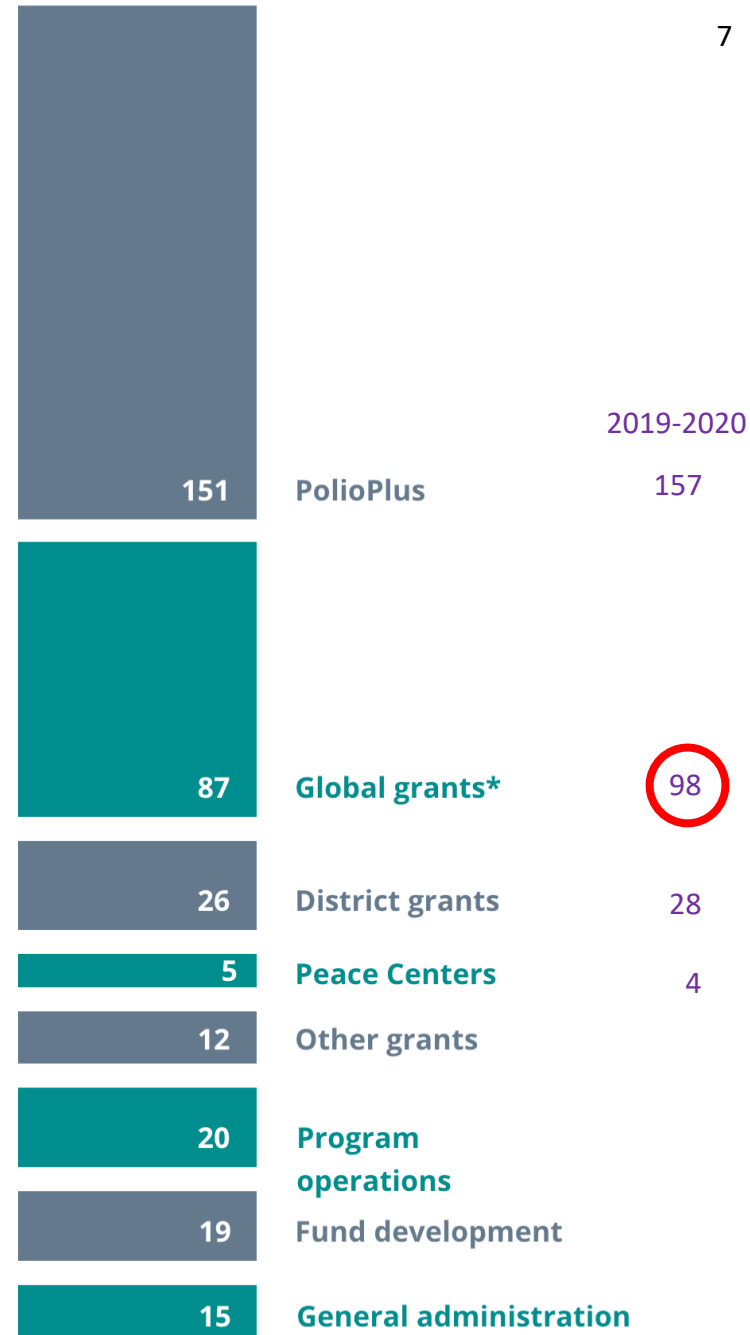
2018-2019 Rotary Year Total Expenditures

\$335 million

* Rotary Year starts on July 1 and ends on June 30 of the following year.

Global grants show a significant increase from 2018-2019 to 2019-2020.

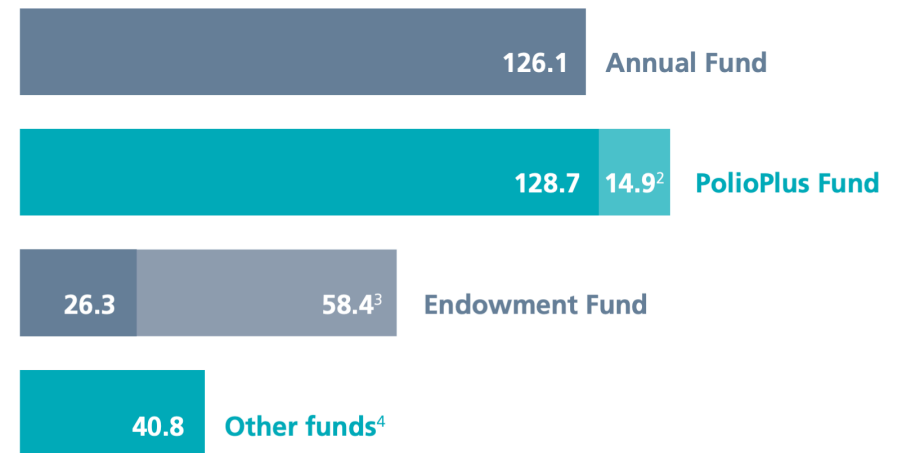
Program awards and operations 90%



* Net of returned funds and other adjustments

2018-2019 Rotary Year Total Contributions

\$395.2 million



¹ Net of returned funds and other adjustments

² Polio transfers

³ Total new commitments to the Endowment Fund

⁴ Includes cash contributions to global grants, the donor advised fund, and directed gifts

THE ROTARY FOUNDATION HAS EARNED THE BEST RATING AS A CHARITY ORGANIZATION

BY CHARITY NAVIGATOR

9

The Rotary Foundation of Rotary International

Enabling Rotarians to advance world understanding, goodwill, and peace

Add to My Charities

Donate to this Charity

Print

Rating Profile

Programs

Historical Ratings

IRS (Forms 990)

	Score (out of 100)	Rating
Overall Score & Rating	100.00	★★★★
Financial	100.00	★★★★
Accountability & Transparency	100.00	★★★★

This rating was published 08/01/2019 and includes data from FY2018, the most recent 990 received at that time.

- High program expenses, low administrative and fundraising expenses, high program expense growth.
- High accountability and transparency performance.

Foundation Funding and Fundraising

HOW DO YOU DONATE TO TRF?

<https://my.rotary.org/en/donate>

Choose what you would like to support

Featured Causes

Areas of Focus

Endowment

Global Grants

Contributions to these featured causes are eligible for Paul Harris Fellow recognition.



Annual Fund

[Learn more](#)



Polio Fund

[Learn more](#)



World Fund

[Learn more](#)



Disaster Response Fund

[Learn more](#)

There are so many options to choose from. I have been told to choose "Annual Fund" if you have any particular choice.

HOW DO YOU DONATE TO TRF?

Choose what you would like to support

[Featured Causes](#)[Areas of Focus](#)[Endowment](#)[Global Grants](#)

Gifts that are designated for one of Rotary's six areas of focus do not generate District Designated Funds (DDF).



Peacebuilding and Conflict Prevention

[Learn more](#)



Disease Prevention and Treatment

[Learn more](#)



Water, Sanitation, and Hygiene

[Learn more](#)



Maternal and Child Health

[Learn more](#)



Basic Education and Literacy

[Learn more](#)



Community Economic Development

[Learn more](#)

HOW DO YOU DONATE TO TRF?

Choose what you would like to support

Featured Causes

Areas of Focus

Endowment

Global Grants

Rotary strives to increase the value of your gift to the Endowment by preserving and investing your initial contribution and spending only a portion of the earnings.



Endowment-SHARE

[Learn more](#)



Endowment-Rotary Peace Centers

[Learn more](#)



Endowment-World Fund

[Learn more](#)

HOW DO YOU DONATE TO TRF?

Choose what you would like to support

Featured Causes

Areas of Focus

Endowment

Global Grants

Global grants support large international activities that have sustainable and measurable outcomes.

Seven-digit grant number

SEARCH

HOW DO YOU DONATE TO TRF?

☐ I would like to make this donation in honor or in memory of someone

☐ This donation is from my club or its members

SUPPORTING THE ROTARY FOUNDATION



PolioPlus Fund

End Polio Now

- Rotary's own financial support for PolioPlus is magnified by an agreement for 1:2 matching with the Bill & Melinda Gates Foundation.



Annual Fund

For support today

- Primary funding source for Foundation grants and activities
- Supports local and international grants through the SHARE system

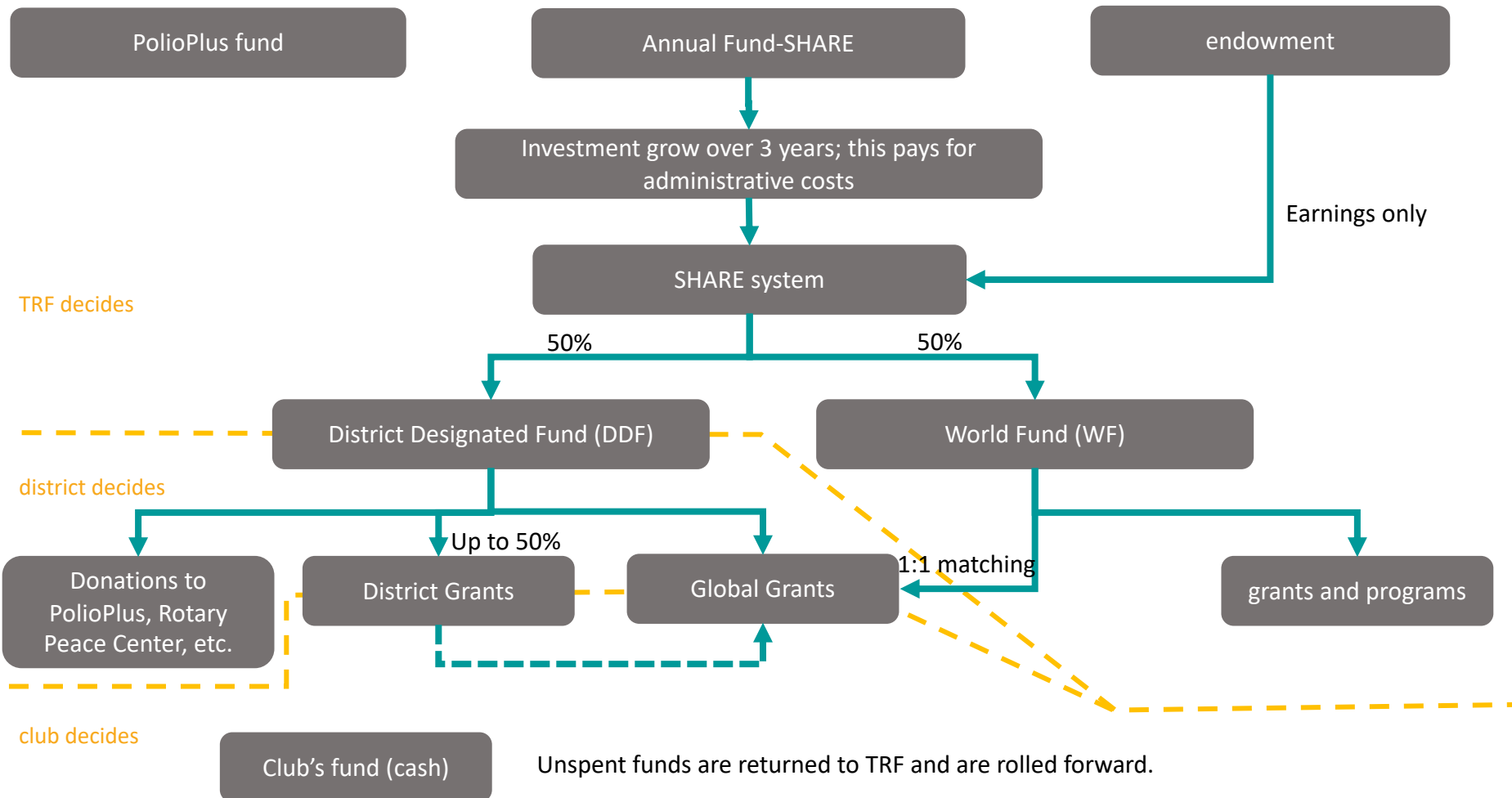


Endowment Fund

To secure tomorrow

- Contributions are professionally invested.
- Only the earnings are spent.

ANNUAL FUND (SHARE)




MAKE SURE TO WRITE "SHARE" TO DONATE TO THE ANNUAL FUND SHARE.

1936

DATE _____

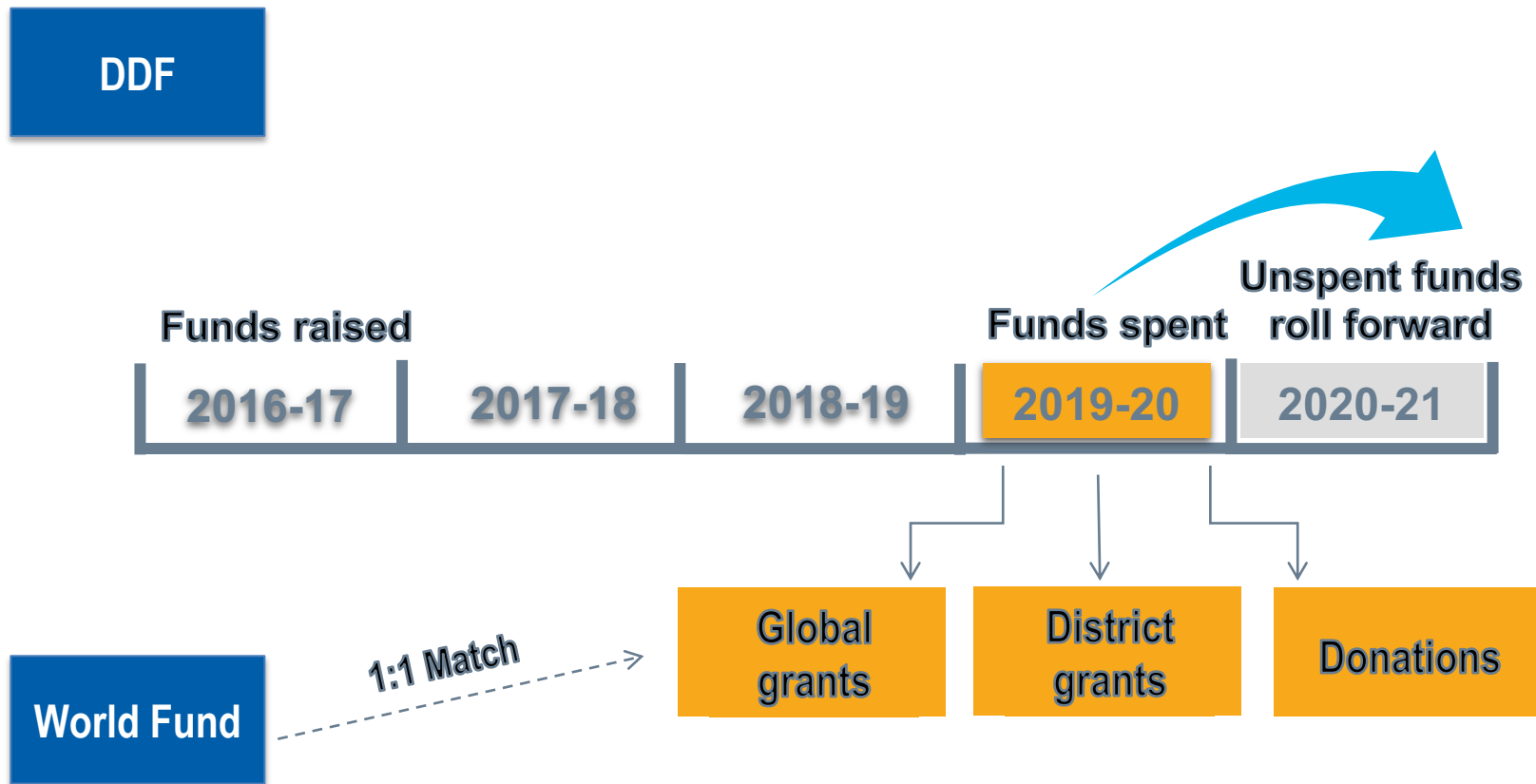
PAY TO THE ORDER OF The Rotary Foundation \$

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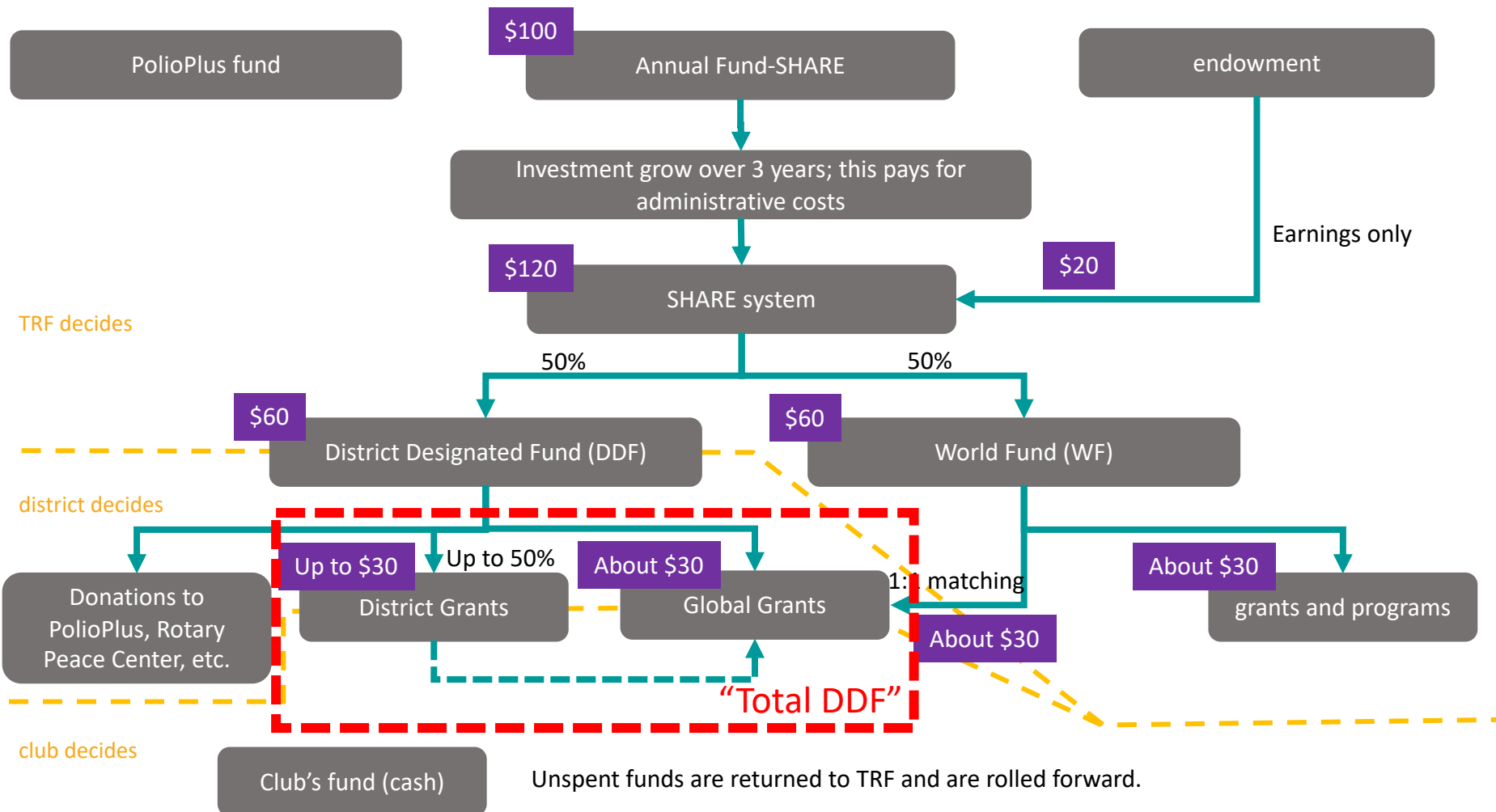
FOR Annual Fund SHARE

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SHARE PROCESS



ANNUAL FUND (SHARE)



HOW MUCH DID WE RAISE ANNUAL FUND (SHARE) THREE YEARS AGO?



SHARE CONTRIBUTION DETAIL FOR PROGRAM YEAR: 2021 (2020-21)

District 5000

Rotary Year 2017-18

Club No	Name	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	Jun 2018	Year to Date
10	Ala Moana, Oahu, HI	1,000.00	3,589.00	0.00	1,072.00	3,000.00	1,918.00	0.00	0.00	57.00	3,810.50	57.00	57.00	14,560.50
23228	Bellevue Breakfast, WA	0.00	0.00	0.00	0.00	20.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00
56907	Diamond Head/Kaimuki, HI	20.00	20.00	20.00	20.00	25.00	225.00	20.00	20.00	543.85	20.00	20.00	770.00	1,723.85
50673	Downtown Honolulu, HI	435.00	385.00	435.00	435.00	785.00	435.00	435.00	535.00	350.00	650.00	400.00	870.00	6,150.00
11	East Honolulu, HI	340.00	127.00	202.00	127.00	102.00	207.00	177.00	102.00	102.00	347.00	102.00	192.00	2,127.00
84881	E-Club of Hawaii, HI	136.00	1,086.00	86.00	1,211.00	86.00	2,086.00	111.00	86.00	86.00	111.00	161.00	86.00	5,332.00
30325	Hanalei Bay (Princeville-At-Hanalei), Kauai, HI	250.00	250.00	0.00	0.00	0.00	500.00	0.00	1,000.00	0.00	100.00	335.00	1,485.00	3,920.00
12	Hawaii Kai, Oahu, HI	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,300.00	225.00	0.00	0.00		
88307	Hickam Pearl Harbor, Honolulu, HI	0.00	0.00	0.00	0.00	0.00	625.00	1,050.00	50.00	75.00	158.34	133.34		
13	Hilo, HI	3,975.00	1,515.00	405.00	688.00	630.00	250.00	400.00	85.00	1,363.00	824.00	405.00		
25520	Hilo Bay, HI	100.00	100.00	700.00	100.00	3,085.00	100.00	650.00	100.00	200.00	2,450.00	100.00	350.00	8,035.00
14	Honolulu, Oahu, HI	950.00	2,625.00	1,675.00	300.00	550.00	3,845.00	100.00	0.00	1,000.00	0.00	850.00	4,526.25	16,421.25
81038	Honolulu Pau Hana, HI	1,220.00	195.00	215.00	240.00	265.00	515.00	390.00	90.00	80.00	105.00	80.00	30.00	3,425.00
27177	Honolulu Sunrise, HI	174.00	599.00	1,149.00	299.00	9,799.00	6,295.00	1,662.00	262.00	262.00	828.00	1,178.00	1,178.00	23,685.00
31173	Honolulu Sunset, HI	185.00	1,085.00	1,085.00	(615.00)	9,860.00	13,860.00	3,710.00	2,360.00	6,110.00	3,460.30	559.70	110.00	41,770.00
76084	Kahala Sunrise (Honolulu), Oahu, HI	265.00	215.00	1,040.00	1,180.00	165.00	717.49	290.00	215.00	215.00	490.00	265.00	385.00	5,442.49
15	Kahului, Maui, HI	210.00	1,545.00	702.00	110.00	110.00	605.00	110.00	110.00	160.00	805.00	130.00	250.00	4,847.00
16	Kaneohe, HI	100.00	100.00	0.00	0.00	100.00	100.00	100.00	0.00	100.00	0.00	0.00	1,900.00	2,500.00
22388	Kapaa, HI	172.50	0.00	172.50	0.00	0.00	172.50	0.00	0.00	0.00	0.00	1,000.00	300.00	1,817.50
30209	Kapolei, HI	135.00	345.00	35.00	35.00	1,285.00	1,635.00	268.00	368.00	268.00	118.34	118.34	93.34	4,704.02
81581	Kapolei Sunset, HI	35.00	935.00	1,960.00	403.00	10.00	1,535.00	35.00	35.00	435.00	365.00	35.00	522.00	6,305.00

\$8,035.00

D5000 allocation rules

HOW MUCH DOES DISTRICT ALLOCATE TO OUR CLUB?

Rotary International District 5000 SHARE Allocation and District Designated Funds Allocations to District 5000 Clubs 2020-21
New Scenario

\$ 144,649.29

\$8,035.00

50% DDF Available GGs \$ 140,719.43

Gross DDF \$ 72,324.65
\$ 64,000.00

Note: Totals below slightly higher--new clubs receive \$300 of DDF

50% DDF \$ 72,324.65
No Match 20%* \$ 28,929.86
Matched 30%* \$ 43,394.79

Club	3 most recent years Average	% of Total	Total DDF	Total 50% DDF for DGs	20% No Match DDF	30% Matched DDF	GGs
Ala Moana	\$ 13,365	4.303%	\$ 6,055.30	\$ 3,112.20	\$ 1,245	\$ 1,867	\$ 2,753.99
Diamond Head	\$ 1,665	0.536%	\$ 754.24	\$ 387.65	\$ 155	\$ 233	\$ 343.03
Downtown Honolulu	\$ 6,422	2.068%	\$ 2,909.56	\$ 1,495.41	\$ 598	\$ 897	\$ 1,323.29
East Honolulu	\$ 3,869	1.246%	\$ 1,752.99	\$ 900.97	\$ 360	\$ 541	\$ 797.27
E-Club of District 5000	\$ 890	0.287%	\$ 300.00	\$ 150.00	\$ 60	\$ 90	\$ 150.00
E-Club of Hawaii, HI	\$ 4,618	1.487%	\$ 2,092.20	\$ 1,075.31	\$ 430	\$ 645	\$ 951.54
Ewa Beach	\$ 158	0.051%	\$ 300.00	\$ 150.00	\$ 60	\$ 90	\$ 150.00
Hanalei Bay	\$ 10,325	3.324%	\$ 2,404.38	\$ 962	\$ 1,443	\$ 2,127.63	
Hawaii Kai	\$ 1,251	0.403%	\$ 291.32	\$ 117	\$ 175	\$ 257.79	
Hickam Pearl Harbor	\$ 2,750	0.886%	\$ 640.47	\$ 256	\$ 384	\$ 566.76	
Hilo	\$ 13,486	4.342%	\$ 3,140.48	\$ 1,256	\$ 1,884	\$ 2,779.00	
Hilo Bay	\$ 6,183	1.991%	\$ 2,801.58	\$ 1,439.91	\$ 576	\$ 864	\$ 1,274.17
Honolulu	\$ 21,921	7.058%	\$ 9,932.05	\$ 5,104.71	\$ 2,042	\$ 3,063	\$ 4,517.15
Honolulu Pau Hana Sunset	\$ 2,812	0.905%	\$ 1,273.93	\$ 654.75	\$ 262	\$ 393	\$ 579.39
Honolulu Sunrise	\$ 26,247	8.451%	\$ 11,891.98	\$ 6,112.05	\$ 2,445	\$ 3,667	\$ 5,408.54
Honolulu Sunset	\$ 46,884	15.096%	\$ 21,242.31	\$ 10,917.77	\$ 4,367	\$ 6,551	\$ 9,661.12
Kahala Sunrise	\$ 5,121	1.649%	\$ 2,320.10	\$ 1,192.45	\$ 477	\$ 715	\$ 1,055.19
Kahului	\$ 4,126	1.328%	\$ 1,869.43	\$ 960.82	\$ 384	\$ 576	\$ 850.23
Kakaa'ako			\$ 300.00	\$ 150.00	\$ 60	\$ 150	\$ 300.00
Kaneohe	\$ 2,557	0.823%	\$ 1,158.39	\$ 595.37	\$ 238	\$ 357	\$ 526.84
Kapa'a	\$ 1,108	0.357%	\$ 502.14	\$ 258.08	\$ 103	\$ 155	\$ 228.38
Kapolei	\$ 6,635	2.136%	\$ 3,006.28	\$ 1,545.12	\$ 618	\$ 927	\$ 1,367.27
Kapolei Sunset	\$ 5,431	1.749%	\$ 2,460.56	\$ 1,264.64	\$ 506	\$ 759	\$ 1,119.08
Kauai	\$ 3,870	1.246%	\$ 1,753.59	\$ 901.28	\$ 361	\$ 541	\$ 797.54
Kihei Wailea	\$ 8,833	2.844%	\$ 4,002.26	\$ 2,057.01	\$ 823	\$ 1,234	\$ 1,820.25
Kona	\$ 6,232	2.007%	\$ 2,823.63	\$ 1,451.24	\$ 580	\$ 871	\$ 1,292.23
Kona Mauka	\$ 3,870	1.240%	\$ 1,753.44	\$ 901.20	\$ 360	\$ 541	\$ 802.46

\$2,801.58

HOW DOES DISTRICT 5000 CALCULATE DDF?

Annual fund that our club raised

2016-2017	\$5,640
2017-2018	\$8,035
2018-2019	\$4,875
average	\$6,183

$$DG \text{ for } 20 - 21 = \frac{\text{average of SHARE (16-17,17-18,18-19)}}{\sum_{all \text{ clubs}} \text{average of SHARE (16-17,17-18,18-19)}} * \text{SHARE allocation from TRF to district}$$

$$GG \text{ for } 20 - 21 = \frac{\text{average of SHARE (16-17,17-18,18-19)}}{\sum_{all \text{ clubs}} \text{average of SHARE (16-17,17-18,18-19)}} * \text{available for GG by district}$$

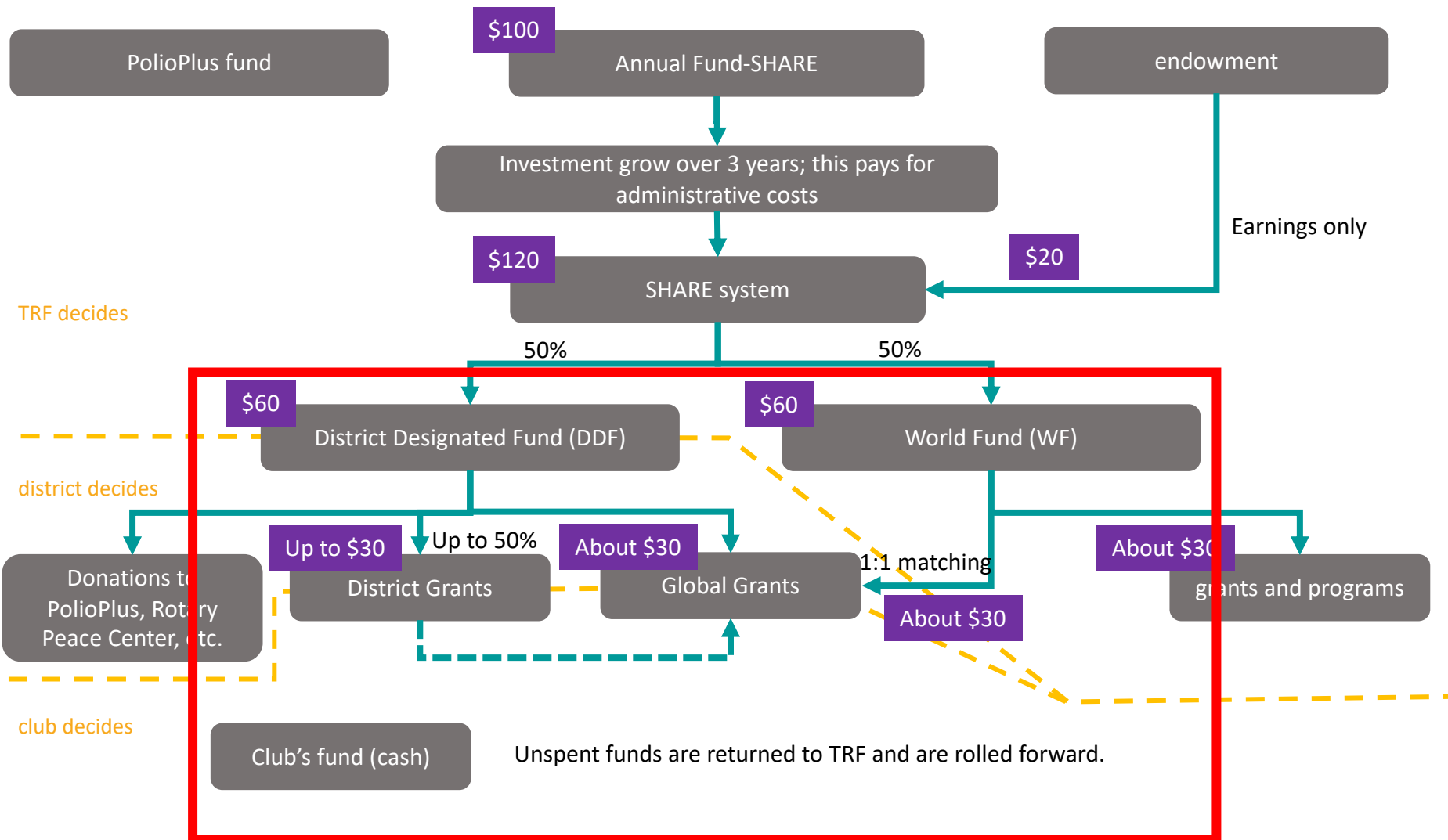
HOW DISTRICT 5000 IS DIFFERENT: DDF ALLOCATIONS TO OUR CLUBS

D5000 2020-2021 DDF plan

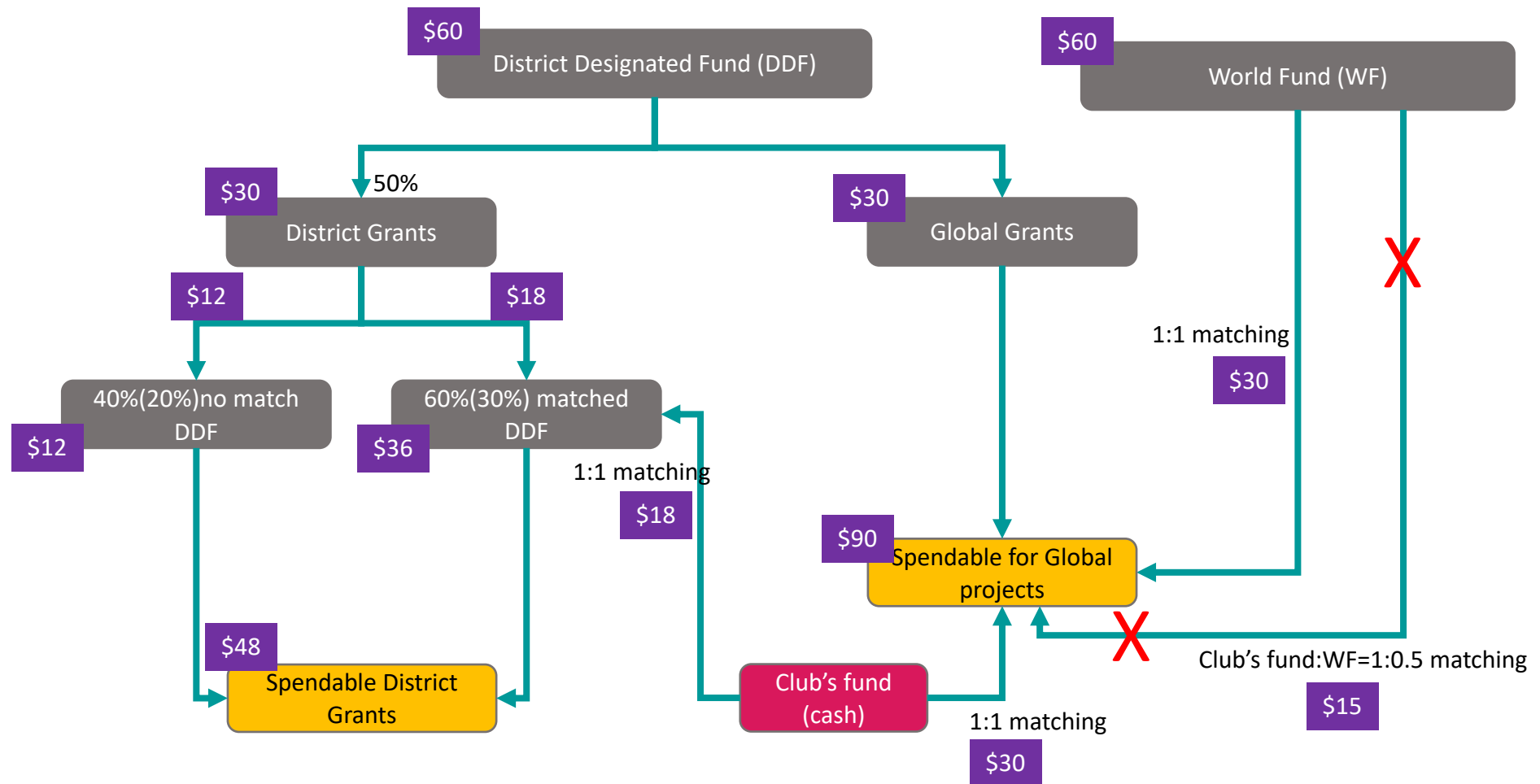
TOTAL DDF	\$144,649
50% ALLOCATED TO DISTRICT GRANTS	\$72,325
NO-MATCH ALLOCATION FOR DGs (20%)	\$28,930
MATCHING ALLOCATION FOR DGs (30%)	\$43,395
ALLOCATED TO GLOBAL GRANTS	\$67,000
20% ALLOCATED TO POLIOPLUS	\$28,930
ALLOCATED TO PEACE CENTERS	\$5,000

D5000 added its money to Global Grants, PolioPlus and Peace Centers.

ANNUAL FUND (SHARE)



IS THIS A D5000 RULE?



WHAT DID OUR CLUB AWARD DISTRICT GRANT TO?

2019-2020

- \$658 for the sponsorship of Pacific Island Youth Empowerment Summit at University of Hawaii Hilo Campus
- \$987 for Hawaii Island RYLA

2020-2021

- \$576 for YWCA Preschool Program

WHAT DID OUR CLUB AWARD GLOBAL GRANT TO?

2019-2020

- None

2020-2021

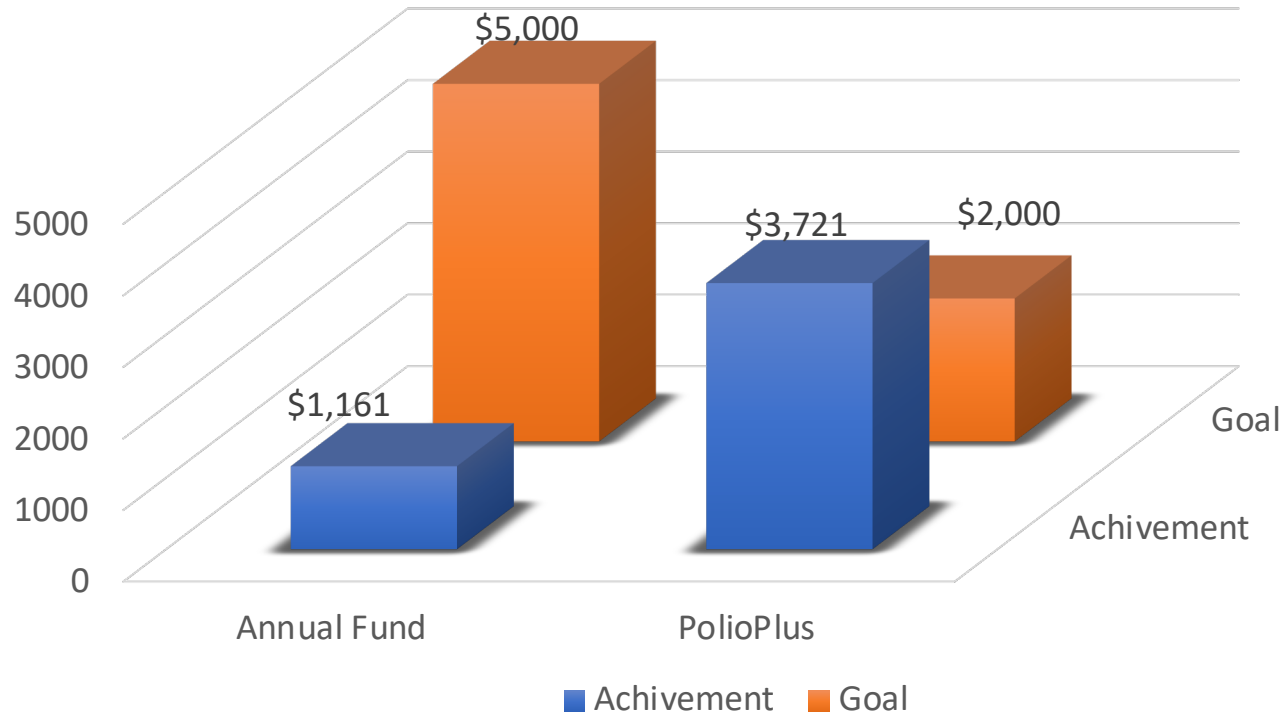
- \$637 for GG1752052 Kumari Hospital medical equipment, training, telemedicine unit
- \$637 for GG2098529 Bhutan Wilderness Medicine VTT

Club matches the above amount from DDF. The World Fund also matches the above amount from DDF. The actual contributions to the projects will become triple (\$1,911 each)

OUR ACHIEVEMENTS AND GOALS OF CONTRIBUTIONS TO TRF

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FOR 2020-2021



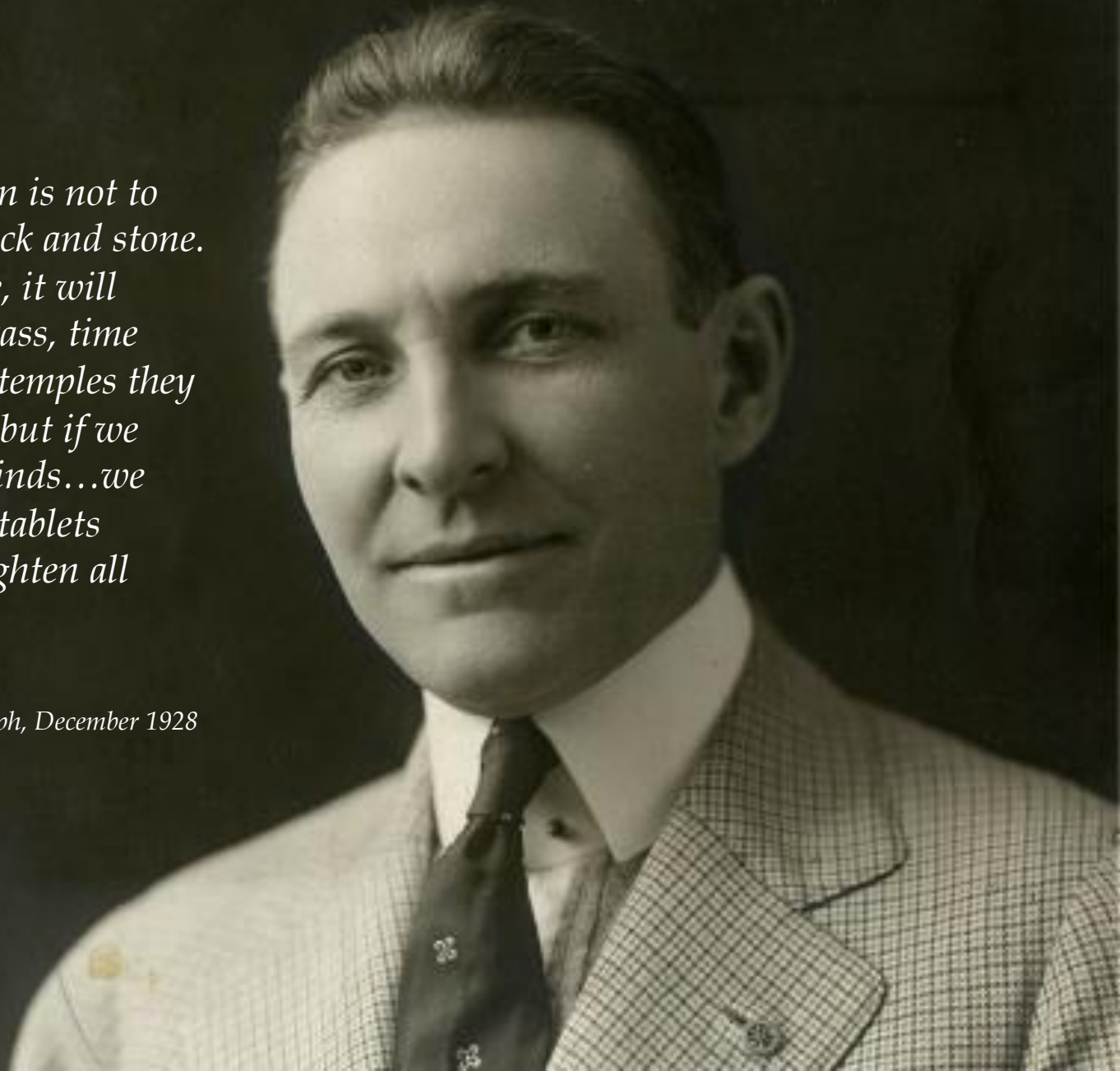
FIVE REASONS TO GIVE TO THE ROTARY FOUNDATION

1. Accountability
2. Impact
3. A record of success
4. Global reach
5. Bringing about peace



"The Rotary Foundation is not to build monuments of brick and stone. If we work upon marble, it will perish; if we work on brass, time will efface it; if we rear temples they will crumble into dust; but if we work upon immortal minds...we are engraving on those tablets something that will brighten all eternity."

— Arch C. Klumph, December 1928





QUESTIONS