

# The Rotary Foundation of Rotary International District 9680 2012-13

## Presentation by Tony Castley

# Our Mission

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* Unique

- Addresses all of the greatest educational and humanitarian needs
- Its World reach is greater than the United Nations
- We can go where politicians and religious groups cannot
- The Rotary Foundation is *OUR* Foundation



# Three Needs, Three Ways of Giving



## Annual Programs Fund

For Support Today

\$312,000 9680 2010-11



## Permanent Fund

To Secure Tomorrow

Nothing from 9680 2010-11

Bequest Society – needs more



# PolioPlus: Our Priority

Earns PHF points

Not part of Annual  
Programs, or the per  
Capita Australia Cup, or  
EREY Giving



Over 1 Billion Dollars spent thus far

# Top Districts in TRF Giving 2010-11

DISTRICT	Annual Programs	Annual Programs % increase Over '09-10	Per capita	Restricted including Polio Plus	Permanent Fund	Total
9800	460,055	30.9%	\$171.79	103,751	9,474	573,280
9680	312,894	35.5%	\$164.08	152,565	0	465,459
9810	247,870	12.5%	\$190.23 *	120,323	1,000	369,193
Australia	3,803,101	37.9%	\$116.33	2,040,805	121,444	5,965,350 *

\*Australia Cup winners 3 years in a Row !

\* \$6 Million USD raised by Australian Clubs in 2010-11

# 9680 Annual Giving –last 5 years

YEAR	Annual programs fund	Restricted including Polio Plus	Permanent Fund	Total	% increase
2006-07	\$128,766	\$97,090	\$5,000	\$230,856	
2007-08	\$202,478	\$60,145	0	\$262,623	13%
2008-09	\$201,140	\$143,927	\$384	\$345,454	31%
2009-10	\$230,975	\$145,500	\$2,000	\$378,474	9%
2010-11	\$312,894	\$152,565	0	\$465,459	24%
2011-12 Feb	\$104,603 -15%				

# District Targets



**\$500,000**

Last year \$465,000

**Possible ? Probable?  
What would it take ?**

**\$ 350,000 Annual Giving ?**

**\$150,000 Polio ?**



# District Targets



## **\$500,000**

**(Perhaps \$400,000 2012-13)**

<b>1,000 Centurions x \$100=</b>	<b>\$100,000</b>
<b>50 x PHS's =</b>	<b>\$ 50,000</b>
<b>10 x Major Donors =</b>	<b>\$100,000</b>
<b>66 Clubs x \$3,800 ave. =</b>	<b>\$250,000</b>
<b>Total</b>	<b>\$500,000</b>

**Dreaming ?, not really**



# Annual Giving

## Encourage *Every Rotarian*

- To contribute *Every Year* to The Rotary Foundation Annual Programs Fund – tax deductible
- To participate in a Foundation humanitarian or educational project *Every Year*
- (Very good website [www.ourfoundation.info](http://www.ourfoundation.info))

## Encourage *Every Club*

- To set minimum US\$100 per capita  
2010-11 \$ 164.00  
2012-13 \$ 200.00 = \$360,000





# Annual Giving

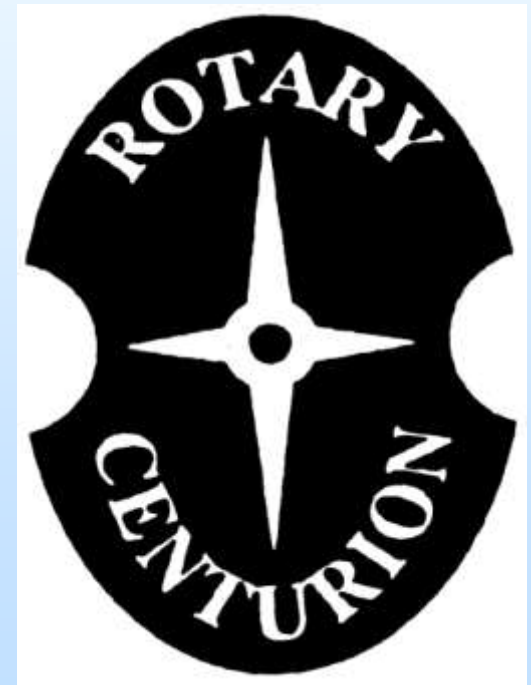
## Rotary Foundation Centurion Member

- Rotarian who contributes at least AUD\$100 every year
- Tax Deductible
- District manages Centurion

District Chair: Vicki de Carle

The accounting is a nightmare ,but we will strive to make big improvements this year

Vicki needs assistants.





# Annual Giving

## Paul Harris Fellow Recognition

- Rotarian who contributes, or in whose name is contributed, US\$1,000
- Tax Deductible if personal
- Make contributions for oneself
- or for someone else





# Annual Giving

## Paul Harris Society Member

- ☐ Anyone who commits to a US\$1,000 donation each year to the TRF
  - ☐ Tax deductible
  - ☐ District manager: PP Margaret Dean
- 
- This is an ideal program for members and clubs who are still caught up in the PHF being an award ( which of course it isn't) A Rotarian can pay the \$1,000 for themselves and wear a different badge , and also the perfect addition for everyone who already wears a PHF badge.
  - Can work ones way up to 1st level Major Donor .
  - This year we are also going to have a Paul Harris Society Dinner , so as to make much more of this PHS.





# Annual Giving

## Major Donor

**Level 1.    \$10,000**

**Level 2.    \$25,000**

**Level 3.    \$50,000**

**Level 4.    \$100,000**

**Arch Klumph Society \$250,000**

- ☐ Tax deductible
- ☐ District manager: PP Margaret Dean

# Foundation Giving and Receiving

Income 2010-11	US\$ '000	Expenses 2010-11	US\$ '000
Contributions	208,487	Education Programs	21,704
Income from Investments	116,833	Humanitarian programs	47,472
Other income	2,721	Polio Plus	77,870
Total revenue	328,041	Global Grants	12,826
		District Grants	6,295
		Other programs	2,384
		Total awards and expenses	168,641
Less expenses	168,641		
Less other costs	23,193		
Net asset increase	137,497		
Net assets	794,967		

# DDF Budgets/Expenditure

2011-12	Budget	Spent	Budget 2012-13	US\$
DDF income	101.911		DDF	115,487
+ roll over \$ 52,163 =	154,074	154,074	Roll over from 2011-12	* 58,574
<b>Ambassadorial Scholar</b>	<b>52,000</b>	<b>81,000</b>	Total available funds	174.061
A.S. Pay for 2010-11		52,000	Payments for last year	81,000
GSE	6,500	6,500	GSE	5,000
DSG	20,114	* 12,000	DSG	23,097
Matching grants	20,000	* 15,000	Matching grants	64,964
Polio	20,000	10,000	Ambassadorial Scholar	FV
Balance		* 58,574	Balance	Nil

\* Estimated .



# Rotary Peace Centers

## Rotary Centers for International Studies in peace and conflict resolution



The Foundation awards Rotary Peace Fellowships for study at six Rotary Peace Centres around the globe

Since 2002-03 more than 500 fellows from 80 countries have participated at a cost of more than \$35 million

# Ambassadorial Scholarships

For students to study  
abroad and serve as  
ambassadors of goodwill  
Cost each: US\$27,000

2012-13 is the last year for  
the current program



# Group Study Exchange

**International  
exchange of  
young  
non-Rotarian  
Professionals**

**2012-13 is the last year  
for GSE as it is now**



# Group Study Exchange

2011-12 is to D1260 UK  
Journalism

2012-13 is to D2440 Turkey  
Non specific



D2440 Turkey, is strong district in central Turkey. Turkey is the '*China*' of Europe so many interesting industries to visit. Our GSE team will visit during April and take in the 98<sup>th</sup> Anzac Day ceremonies at Gallipoli .

# Tri-district Foundation Luncheon

4<sup>th</sup> year- we had 280 attend last year

This year, Monday December 3<sup>rd</sup>, Dinner function

PHSs and Major Donor presentations

Corporate PHFs

RIPE Ron Burton as guest speaker





# Matching Grants



RC Crows Nest - Thailand

- Assist Rotary clubs and districts in carrying out humanitarian service projects in cooperation with Rotarians in another country
- The need is so great with some 2 billion people living in poverty:
    - 1 billion less than \$1.00 day
    - 800,000 hungry ( nutrition)
    - 25,000 children dying every day from preventable causes

# Matching Grants

## General Guidelines

- Projects must involve active Rotarian participation
- Grants must address a humanitarian need
- All grants must adhere to the Terms and Conditions of Matching Grants Award
- Reporting is crucial
- Club funding matched 50%, District matched 100%
- TRF recommended time cycle is 10 weeks, that is from the receipt of application.
- The Principle club in our district and the club in the project district must have a “clean slate “ with the Foundation



# Matching Grants

## Matching Grants eligibility

### Eligible:

Humanitarian activities to benefit a community in need

- Infrastructure
- Equipment
- Short term Labour
- Education to Secondary
- Domestic Travel
- International Travel (Rotarians)
- +Insurance , food, expenses
- Publicity re a project

### Ineligible:

Buildings or upgrades  
Plumbing – Electrical (internal)  
Salaries  
Post Secondary education  
Land Mine Removal  
Existing Projects  
Projects already Started  
Birth Control





# Matching Grants

## Matching Grant Advantages

- Matching grants are the only Foundation program which attracts financial matches for the Foundation.
- 50 % match for Club funds and 100% match for DDF.
- A matching grants project is a club project and stimulates engagement amongst the members. Often the club runs a trip to visit the project. Creates lasting friendships.
- Humanitarian matching grants, brings aid and hope to some of the 2 billion impoverished citizens of this World. They create peace and good will. ( Banda Aceh)

# Matching Grants

## New Matching Grant Advantages

- Rotarians can now have their airfares (international and domestic) , accommodation , meals and other expenses all covered in a matching grant – as long as they are essential to the project.
- Rotarians can have their donations to a club matching grant be both tax deductible and 50% matched.
- The above two points are very powerful reasons why people with overseas aid projects should become a Rotarian!! These advantages are ***not permissible*** to anyone other than Rotarians.
- This is great incentive for doctors, nurses, professionals, tradesman working overseas at their own costs ( and there are heaps of them ) to join Rotary . ( E-club )



# How to- Matching Grant on a Page

- Fully inform clubs before they start to plan
- Inform clubs that DSG's and MGs are not difficult
- Keep it simple
- Check all the pit falls at the very beginning.
- Committee members to visit the clubs at first discussions and stay in touch throughout the grant process

# Matching Grants – on a Page

**It is this simple**

- \$4,000 from a club or clubs will fund a \$16,000 grant .  
How- Clubs really don't need to know, but this how

Club/s \$4,000	TRF 50%= \$2,000	\$6,000
District \$5,000	TRF 100% = \$5,000	\$10,000

- District is going to do 8 x \$ 4,000 average DDF MGs, and 3 x \$10,000 DDF MGs in 2012-13
- Projects must meet the Foundation criteria- and committee members will have all the details.
- Funding could take up to 10 weeks , so plan ahead
- Clubs must have “clean’ record with the Foundation



# Matching Grants 2012-13

## Pitfalls to be avoided

- No buildings - except toilets and wash rooms  
)
- Clubs both 9680 club and the overseas club must have a “clean slate ” with the TRF
- Re reporting and number of grants open.
- Project must not be in a FV district
- Project must fit the TRF criteria
- Clubs should talk to the our Foundation Committee Zone Representative –day one of developing a project.

# Foundation Committee 2012-13

District Foundation Chair Tony Castley

## Grants Committee

- Barry Philps Chair
- John Steel
- Dave Rickards ( advisor )
- Annona Pearce
- Peter Kindred

## Ambassadorial & Peace Scholars

- Martin Silink
- Gina Growden
- Gavin Ralston

## Group Study Exchange

- Julian Gregory

## Alumni

- Lindsay May

## Centurion

- Vicki de Carle ( assistants to be selected )

## Polio Plus

- Pam Pritchard
- And assistants yet to be selected.

## Annual Giving

- PDG Tony Castley
- Richard Sharpe
- Judith Croll

## PHS and Major Donors

- Margaret Dean

## Permanent Fund

- David Rands

## Annual Foundation Luncheon 3/12

- Tony Castley Chair
- Barry Antees and Lindsay May
- Graeme Davies
- Garry Browne 9750



# Foundation Committee 2012-13

- For 2012-13 All committee members will work together for the combined promotion of the Foundation
- Each committee members will be given a group of clubs to look after.
- Between May and July this year Committee members will visit every club in the district.
- The committee will meet this year in April and May so as to prepare the 2012-13 programme
- Clubs will be asked to fill in the Foundation goal forms. Committee members will take the form with them to the clubs and chase them up thereafter.
- Regular committee meetings will be held throughout the year, possibly prior to each District team meeting



# Zone Foundation Mentors



North Western  
David Rands

Upper North Shore  
John Steel

Beaches  
Peter Kindred

Riverside  
Lindsay May

Central Coast  
Vicki de Carle

Peninsula  
Gavin Ralston

Northern Districts  
Greg Newling

The Hills  
Barry Philps

Lower Central  
Coast  
Annona Pearce

Upper Central  
Coast  
Richard Sharpe

City North  
Judith Croll

North Shore  
Martin Silink





# The Rotary Foundation Future Vision Plan



## PURPOSE

Simplify Foundation programs and processes consistent with the mission

Focus Rotarian service efforts where they will have the greatest impact by addressing priority world needs that are relevant to Rotarians

Offer funding options to help achieve both global and local goals

Increase the sense of ownership at the district and club levels by transferring more decisions to the districts and their member clubs

Advance understanding of the Foundation's work and enhance Rotary's public image

## MISSION

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.

[www.rotary.org/futurevision](http://www.rotary.org/futurevision)

## 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

# Future Vision Time lines

- 1 July 2012 Appoint a district Rotary Foundation committee chair for 2013-16
- July-December Identify and appoint chairs for district Rotary Foundation subcommittees
- August-December GETS and Rotary institutes
- Train clubs at district Rotary Foundation seminars
- January 2013 International Assembly- TC goes to this for training
- **Begin online qualification process**
- **February Continue training and qualifying clubs**
- **February-June Apply for Rotary Foundation grants online for the 2013-14 Rotary year**
- **Submit reports for all Rotary Foundation grants and programs**
- June RI Convention workshop

# Future Vision 2013

## District Grants – Block

Up to 50% of DDF

Administered by the District

District must be qualified

Clubs to complete MOU-

Limits : District can set limits

Projects must fall within the Rotary Foundation Mission Statement.

Club must report regularly.

## Global Grants

Project value must be \$30,000+

TRF contribution must be \$15,000+

TRF match is 100% from DDF and 50% for all other cash donations

First step is a proposal – must be in one of the 6 Areas of Focus

If TRF contribution is more than \$100,000 must be approved by the RI Board

When proposal is approved , then apply by online application

Must be reported within 12 months

Applications can be made as from February 2013

# Children with nothing to make them smile



The majority of Tanzania's children don't know how to smile. They have never had anything to smile about! There are at least 10 million children living in Tanzania living in abject Poverty  
These children do not go to school



# But they can smile -with your help!



The smiles on the happy African children are infectious . When the children are happy and safe they show it with the most brilliant smiles.

Education is the difference!

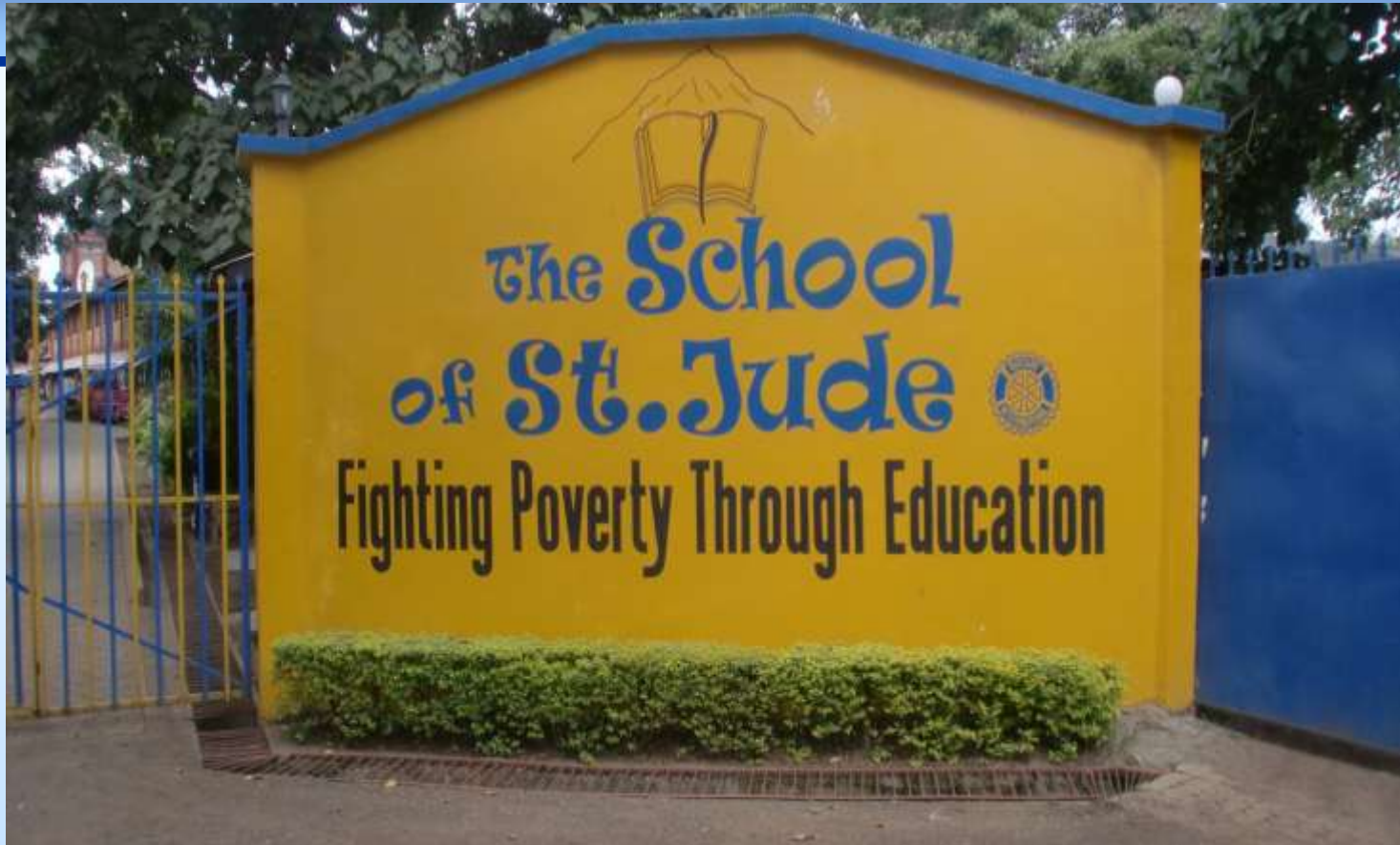
# Education – the way out of poverty



The Katuuso School Uganda – project of the E-club of Greater Sydney



# One of the best Rotary assisted projects



The School of St Jude in Tanzania is the best Rotary assisted project I have ever been involved with . This school started by Australian Gemma Sisia ( Nee Rice ) began with 3 students in 2002, and today it has over 1,300 students plus some 360 staff. We visited the school twice during our Tanzanian trip.

# Friday's assembly at the main school



At 10am every Friday there is a school assembly . The children assemble in the huge assembly hall and different classes or groups perform something on stage, then they present awards to students, teachers and staff, and then they sing the school song and more –all 700 of them -

What a magnificent experience .



# Volunteer work is very important



Volunteers form a very important part of the work force, with most all the administration staff being volunteers on one or more years stays. We helped out by painting benches and the girls covered books in the library.

**You have the power to make them smile !**



As a Rotarian, you have the power to make these children smile . You and your club can really make a difference to hundreds of children living in poverty.



# So put yourself in the picture



It will be one of your life's greatest experiences



# Group Study Exchange



**International  
exchange of  
young  
non-Rotarian  
professionals**

2012 – 2013 Chair:  
Julian Gregory





# Group Study Exchange



2012 – 2013 Exchange is with D2440 from Turkey.

The Outbound Team will be at Gallipoli on ANZAC Day.

Inbound Team will be at our District Conference

Inbound – March 2013

Outbound – April 2013










# Group Study Exchange



## Overview

-  Exchange lasts for 4 weeks
-  Minimum of 5 vocational days - vital
-  Cultural Activities – also important
-  Hosted in Rotarians' homes
-  Team members ages 25-40



# Group Study Exchange



## Outbound



Team members must be:



Australian citizens,



fully employed; and



have 2 years of experience in current vocation





# Group Study Exchange




## Overview - Inbound

 1 week in each location across District

 Hosted by Rotarians

 Cultural Activities also important

 But...just because they are Turkish  
doesn't mean they want to see every  
WWI memorial in our district!








# Group Study Exchange



## **Ideal Candidates for TEAM LEADER**




-  Outstanding interpersonal communication skills
-  Has presentation and public-speaking skills
-  Able to help the team prepare for speeches at Rotary clubs



# Group Study Exchange



## Ideal Candidates for TEAM LEADER (cont.)

-  Ability to build a team with a sense of mission
-  Extensive Rotary knowledge and is able to train the team on aspects of Rotary
-  It is recommended that the team leader **not** be more than 20 years older than the oldest team member



# Group Study Exchange



## **Ideal Candidates for TEAM MEMBERS**

 GSE is a VOCATIONAL based exchange,

 Looking for people for whom this experience will make a difference.

 Important that the team members selected have vocations that exist in the host district.



# Group Study Exchange



## **Ideal Candidates for TEAM MEMBERS (cont.)**

 The following vocations are recommended:

 Education

 Police & Emergency Services

 Government Services

 Forestry , Agriculture

 Health Care, Community Service

 Hospitality Industry, Tourism



# Group Study Exchange



## **Importance of Vocational Days**

GSE team members must have at least 5 personalised vocational days. Anything less and the exchange becomes a vacation and does not fulfill the objectives of the program.





The more opportunities that team members have to visit vocational sites and see firsthand how their profession is practiced abroad, the more the exchange will benefit their careers. Their employers will also recognise the value!



# Group Study Exchange



## Funding

-  Main funding provided by the World Fund – basically the cheapest return ticket and language training
-  GSE team = 4 non-Rotarians + 1 Rotarian
-  District can pay to send additional (5<sup>th</sup>) member – cost \$3,000
-  Sponsor Clubs contribute \$600 towards team member's uniforms.





# Group Study Exchange



## Information



What is Rotary?



What is GSE?



Why I should Participate



Benefits to Employer



Who is Eligible?



What is the program structure?



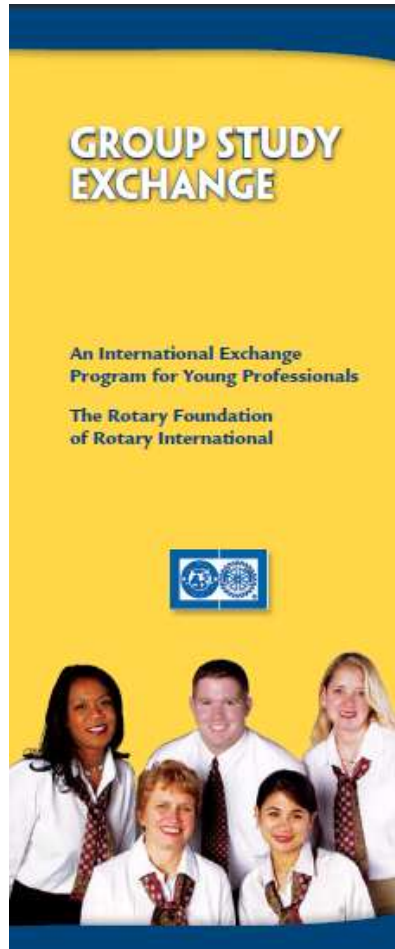
What is provided?



What is required by me?



How do I apply?









# Group Study Exchange 2012-13



## Key dates

 TEAM LEADER nominations close:  
31 Aug 2012






 TEAM MEMBERS nominations close:  
31 October 2012



# Group Study Exchange



## Action Plan

-  Canvas members to nominate a member to apply for TEAM LEADER.
-  Canvas members to seek out and interview TEAM MEMBER Candidates.
  -  **MUST have AUSTRALIAN PASSPORT.**
  -  Cannot have a relative who is a Rotarian
  -  Must be over 25 and not over 40 on the departure date






# Group Study Exchange



## Action Plan (cont.)

### TEAM MEMBER Candidates (cont.).

-  Must have been with current employer for at least 2 years
-  **MUST** live or work within D9680
-  Must be able to take 4 weeks leave in April of 2013 to participate









# Group Study Exchange



## Action Plan (cont.)


### INBOUND SUPPORT


-  Need 4 people to help with organisation; 1 from each of:
  -  Central Coast
  -  Hills
  -  Northern Sydney Suburbs
  -  Lower North / Peninsula
-  Will also need hosts, drivers and activities



# Group Study Exchange



 I know you hear this all the time and until you have the experience it can be very hard to understand.

 Rotarians who help with the GSE as hosts, drivers etc. all say that it was enriching, rewarding and a lot of fun.

 It only involves a little bit of effort for a few days