

# Foundation Giving 6/8/11

## Goals of RI Foundation 2011-12 from July Rotarian Magazine - Bill Boyd

- Complete Eradication of Polio
  - Cannot relax as seen in recent outbreaks
- Every Rotarian should feel that they own a part of the Foundation.
  - We do that through our service and contributions
- Make our Foundation more effective and efficient by testing and refining our future Vision Plan
  - This is a preparation year for Future Vision at club and District Level for non-pilot districts

# How The Rotary Foundation Works

Interest pays The Rotary Foundation Management Costs

Club and District Annual Program Fund Donations

District Designated Fund (DDF)

The World Fund (SHARE)

The Rotary Foundation Educational & Humanitarian Programs

Educational Scholars  
Group Study Exchange  
Individual Grants  
Matching Grants  
3-H

50%

3-Year Investment

50%

Rotary District Programs

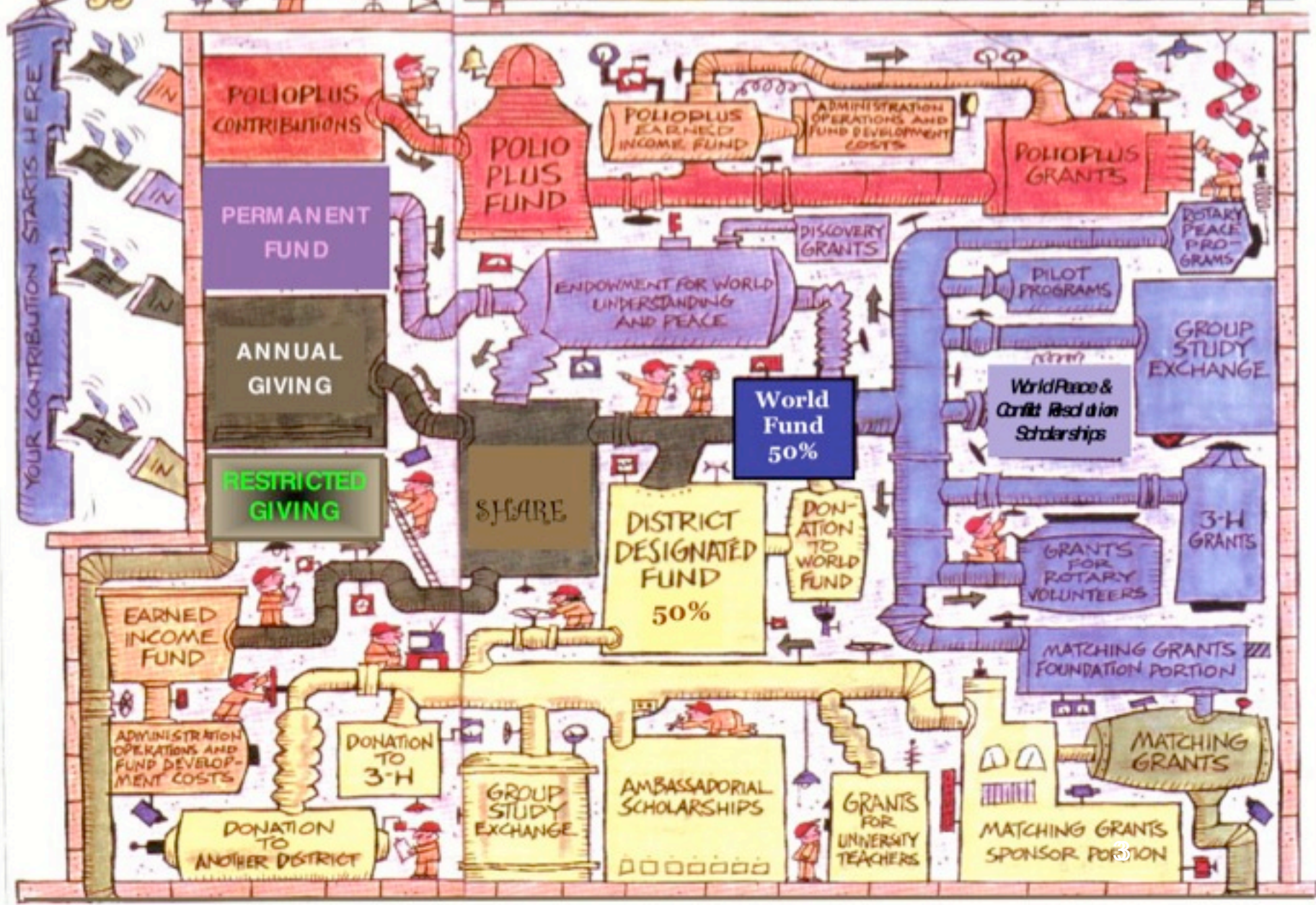
The Rotary Foundation

Group Study Exchange  
District Simplified Grants  
Matching Grants  
Scholars

Paul Harris Fellow Recognition

Local Club: Individual Donations \$\$ to Annual Programs Fund

# the ROTARY FOUNDATION OF ROTARY INTERNATIONAL



# The Charts simplified

- Giving this year is returned from investing in 3 years
- 50% is returned to the district as District Designated funds (DDF)
  - This can be spent on Ambassadorial Scholars, extra GSE teams, District Simplified grants to a maximum of 20%, and International Matching Grants or other ways.
  - Unused funds can rollover to following years
- 50 % is kept by International in the World Fund
  - Funds Educational & Humanitarian Programs
    - Educational Scholars
    - Group Study Exchange - 1/2 to each district
    - Matching Grants
    - 3-H - when Investments allow

# RI Foundation Giving Designations

- ANNUAL GIVING - All contributions support SHARE
  - 50% to District Designated Fund
  - 50% to World Fund - Counts toward Club and District APF Goal
  - Counts toward Annual Giving Per Capita
  - PHF recognition available

RESTRICTED GIVING - Supports program selected by donor

- Matching Grants - PolioPlus - PolioPlus Partners - World Fund - Other Approved Programs
- Does not count towards Club or District APF Goal
- Does not count towards Annual Giving Per Capita

PERMANENT FUND - Contributions are never spent

- Earnings are spent on programs
- Donor can designate earnings for
- SHARE - World Fund - Other (major gifts only)
- Benefactor recognition available
- Does not count towards Club or District APF Goal
- Does not count towards Annual Giving Per Capita

# Polio Plus

- Goal - eradication of polio by Dec 2012
- Worldwide - as of June 2011 RI raised \$175M of \$200M of Gates matching Grant
- District - last 4 years raised \$594K or 108% of our goal of \$175 per rotarian
- 42 clubs exceeded goal
  - Arvada top \$534 per member
- Goal of District 2011-2012 raise another \$50,000 thru community awareness events

# Polio Numbers

In 2010 there were a total of 1349 Cases

Year to July 6	2010	2011
Worldwide	501	252
Pakistan	29	58
Afghanistan	12	8
Nigeria	3	17
India	22	1
Chad	26	85
DR Congo	1	60
Congo	441	1
Tajikiastan	457	0

# Permanent Funds recognition

- Benefactor is \$1,000 or more gift or provision in their estate to Permanent fund
- Bequest Society is \$10,000 or more by individuals or couples who have made commitments in their estate
- Gifts to Permanent fund can be designated for SHARE or World fund
- World Peace Scholar donors to raise permanent endowment to \$100 Million



# Permanent and restricted giving 2010-2011

- Restricted giving \$275,386
- Permanent fund \$14,900
- Million Dollar Dinner ?
  - pledges totaling about 1.5 Million dollars

# Annual Giving

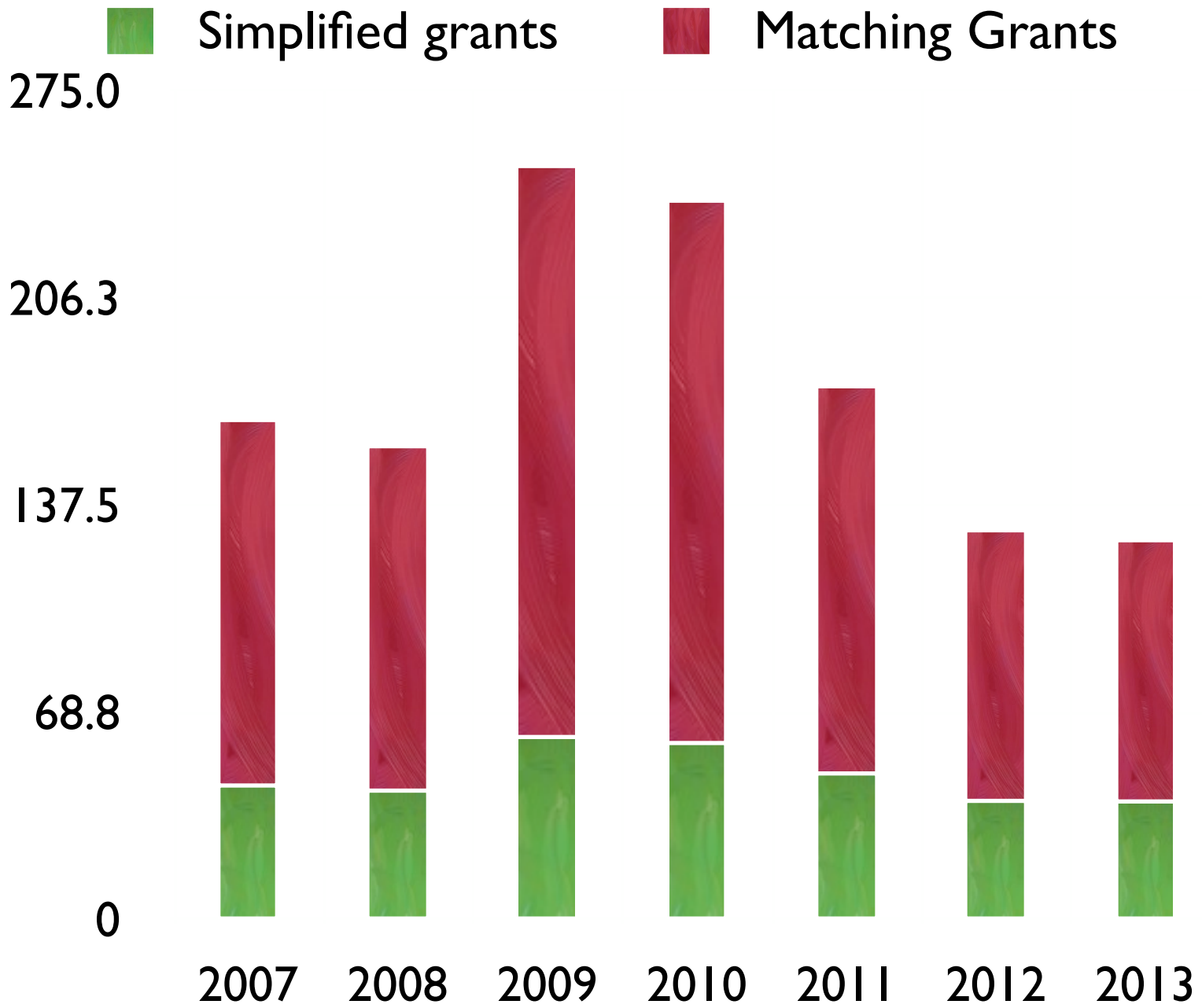
## How does 5450 spend it

Year	2007-2008	2008-2009	2009-2010
Annual giving 3 years earlier	\$445,812	\$428,434	\$606,176
Total DDF	\$222,906	\$214,219	\$303,088
GSE team	\$11,000	\$11,000	\$13,000
2 Ambassadorial scholars	\$46,000	\$46,000	\$50,000
Simplified grants	\$44,581	\$42,842	\$60,616
Matching grants	\$121,325	\$114,375	\$189,467

# Annual Giving

## How does 5450 spend it

Year	2010-2011 Actual	2011-2012 Actual	2012-2013 Actual	2013-2014 Approximate
Annual giving 3 years earlier	\$585,760	\$484,358	\$394,484	405,319
Total DDF	\$292,880	\$242,179	\$197,242	202,660
GSE team	\$13,000	\$13,000	\$14,000	\$14,000
2 Ambassadorial scholars	\$50,000	\$52,000	\$54,000	\$56,000
Simplified grants	\$58,576	\$48,485	\$39,448	\$40,532
Matching grants	\$180,002	\$128,758	\$89,826	\$92,128



# District Goal One Million Dollars Annual Giving every year

Annual giving 3 years earlier	\$1,000,000	Under Future Vision District has more control of funds
Total DDF	\$500,000	Amount still returned to District under future Vision
GSE team	\$45,000 3 teams	3 teams between 67 Clubs still leaves clubs without GSE visits
Ambassadorial scholars	\$90,000 3 scholars	We can fill this each year
Simplified grants	\$100,000	Currently run out of funds in Nov
Matching grants	\$245,000	We can spend this money easily

# How do we reach ONE MILLION DOLLARS?

	Amount	# rotarians	
Every Rotarian Every Year (\$120/yr.)	\$375,600	3130	
50% Rotarians in Dollar a Day (\$300/yr.)	\$313,000	1565	Is EREY
10% Paul Harris Society (\$1000/yr.)	\$219,100	313	EREY & DAD
White Hat Society (\$5000/yr.)	\$97,600	20	EREY, DAD & PHS
<b>TOTAL</b>	<b>\$1,005,300</b>		

# Giving now is important

- In 2002, when the stock market was down, 70 percent of the population in the USA gave an average of \$2000. Rotarians can match 70% of the population.
- Remember what you give this year affects what we have to spend in 3 years.
- Plan what you can afford to give every year and then implement a way to make sure you give every year with an increase.
- Use matching points to get your Paul Harris fellow and help others in your clubs.

# How to increase Annual Giving

- For those who say they cannot afford to give, setup a fund raiser run by those members and split the proceeds between those participating
- Encourage members to quickly get their Paul Harris Fellow levels
- Use matching points to reach those levels
- Become EREY club
- Become EREY Sustaining club
- Become Paul Harris Fellow club



# How to contribute

- Club Dues
  - Send in end of each quarter using Multiple Donor Form
- Online
- Recurring Gift Form-Credit card or direct from Bank Account
- Rotary Credit card for Polio

# Food for Thought

- Only about 25% of our district Rotarians give \$100 or more.
- Last year 3 clubs gave nothing!
- Approximately %50 of our Rotarians give nothing to annual giving!
- We are at a per capita giving level of \$126, last year we were at \$153!
- But - We are the best in our zone and were last year.
- Our District gave \$1,552,196 in 2009-2011, due to Polio & Benefactor giving. \$682,015 last year 2010-11

# How did WP/FV Rotary do?

- Met Polio Challenge \$5250.00
- Annual Giving as of 2010-11 \$5575.00
  - Per Capita \$179.84
- Every Rotarian Every year
  - 12 of 31 members
  - 11 of 31 Sustaining (minimum \$100 in year)
- 3 Paul Harris society (\$1000 in year)
- No giving to Permanent fund
- Club has 11 Paul Harris Fellows
- Bequest and Benefactors

# Top Clubs 2010-2011 Per Capita

- Smoky Hills \$449.42
- Parker \$329.24
- Arvada Sunrise \$290.13
  
- WP/FV \$179.84 - 13th

# How could we meet \$1M /yr

- 32 members
- We have 3 PHS - \$3000 - goal met!!
- We have 7 EREY need 15 at \$120 per year - \$1800
- We have 1 DAD need 15 at \$300 per year - \$4500
  
- Total \$9300 or \$290.63 and we would have been in 3rd place this year

# Set goals for our club

- Become an EREY Sustaining club every year - Everyone commit to minimum \$120 per year
- Make any new member a PHF within 1st year of joining thru points and matching contributions. Become a Paul Harris Fellow club.
- Every member fill out a pledge at beginning of year on level and how to give. Will be reminded by Club RI Foundation chair

# How do we do it annually

- Every rotarian in club be at least \$120/yr
- 15 of you become \$300/yr DAD's
- 3 members become yearly PHS regularly \$1000 /yr sustained
- How to give:
- EREY \$30 per quarter in club dues easiest
- DAD \$75 per quarter in club dues or go online and give
- PHS however you want - Most do it online

# Additional tips

- If you cannot afford to give personally to meet your goal, participate in special fund raiser with others like you just for this purpose.
- Fund raiser could be also to help everyone become Paul Harris Fellow ASAP.



# Thank you for your giving

## Your District Annual Giving Chairs

- Eden Recor [eden@rkymtnhi.com](mailto:eden@rkymtnhi.com)
- Tom Maier [diverdds@comcast.net](mailto:diverdds@comcast.net)

WP/ FV Club RI Foundation Chair - Steve Radcliff