

Welcome to  
Rotary District 7780

Rotary Foundation  
Basics 101

We will begin shortly.

Please enjoy this short  
video.





# ROTARY FOUNDATION BASICS

Brenda Cressey

District 7780 Fund Development Coordinator

# TRF BASICS – 101 - TOPICS

- **Opening/Session Overview**-Brenda Cressey, Fund Devel. Chair
- **Welcome** - DG Claudia Frost & DGE Marion Cheney
- **Annual Fund** - Jeff Slaton, Chair
- **Paul Harris Society** - Marianne Pinkham, Chair
- **PolioPlus Society** - David Taft, Chair
- **Bequest Society** – PDG George Rice and Patty, Co-Chairs
- **Major Donor/Endowment Fund** – PDG Ron Smith, Chair
- **Assistant Governor support/Q&A/Closing** – Gregg Dowty, AG



# THE ROTARY FOUNDATION'S MISSION

The Rotary  
Foundation helps Rotary  
members to advance world  
understanding, goodwill,  
and peace by improving  
health, providing quality  
education, improving the  
environment, and  
alleviating poverty.



# SEVEN AREAS OF FOCUS



# DG CLAUDIA & DGE MARION





A woman with dark hair tied back, wearing a maroon sweater, is seated at a wooden workbench. A white measuring tape is draped around her neck. She is looking towards the camera with a slight smile. In the background, there is a wooden cabinet and a sewing machine on the workbench. The image is split vertically, with the left side having a blue tint and the right side being in natural light.

# THE ANNUAL FUND

Jeff Slaton  
Annual Fund Chair

# ANNUAL FUND – SHARE – MAINE FUNDING SOURCE FOR PROJECTS



## Your gifts:

- Transform into service projects
- They change lives
- They empower Rotarians to carry out sustainable service projects in your community and around the world.

\*Includes PolioPlus, Rotary Peace Centers, other districts, and the Endowment Fund (areas of focus)



# EVERY ROTARIAN/ROTARACTOR EVERY YEAR

**In 2020-21**

- \$139.4 M – Annual Fund
- 1884 Global/District & Disaster Response Grants awarded
- Selected 130 Peace Fellows – Rotary Peace Centers

**Imagine if more donated**



# IMAGINE CHALLENGE 2.0 – ANNUAL FUND FOCUS



# WAYS TO GIVE

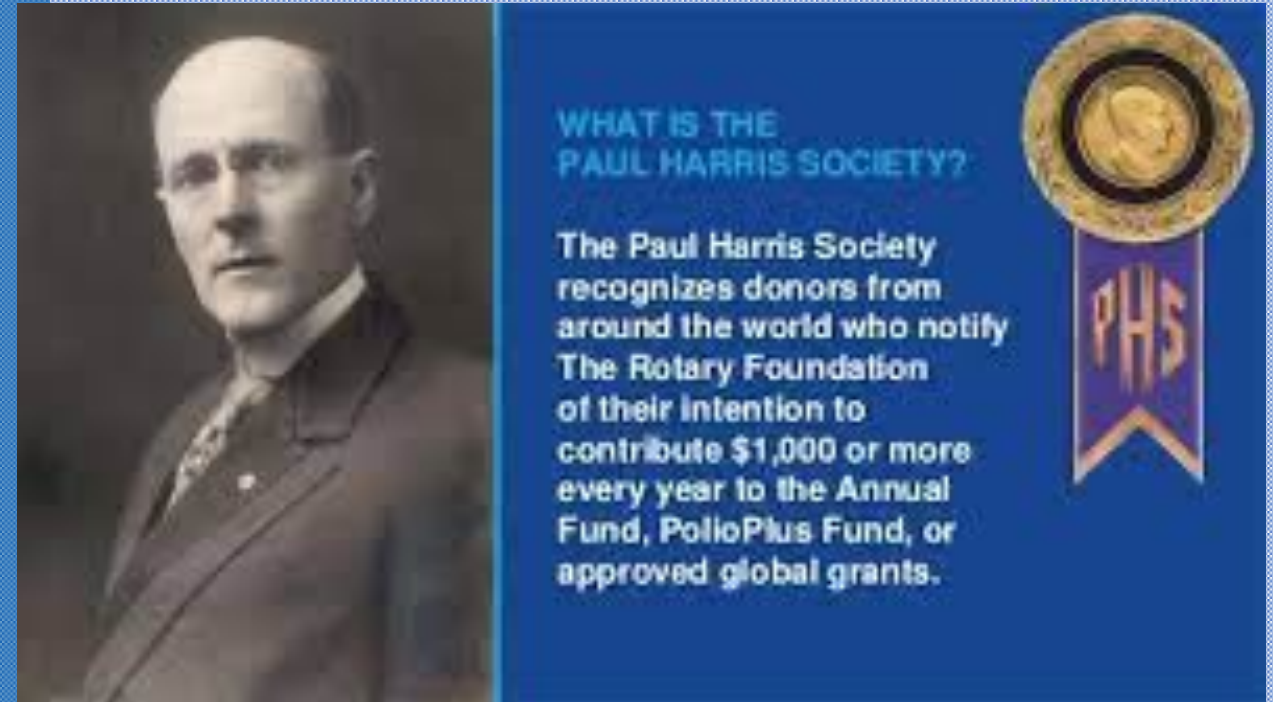
- Rotary Direct
- Online at [rotary.org/donate](https://rotary.org/donate)
- Give a check to your club Foundation chair
- Mail your gift directly to the Foundation
- Grow your impact with a corporate matching gift





# PAUL HARRIS SOCIETY & OTHER RECOGNITION

Marianne Pinkham  
Paul Harris Society Chair



# Why the Paul Harris Society?

- Opportunity to Identify/Engage and thank donors
- Designate annual gifts of \$1000 to:
  - Annual Fund/PolioPlus/Grants
- Recognition – Certificate, PHS pin and chevron



# Paul Harris Society Become a Member Today

- ✓ Join on-line
- ✓ Complete the brochure
- ✓ Call the Rotary Support Center
- ✓ Rotary Direct is a convenient way to give:
  - ✓ \$ 85 per month
  - ✓ \$ 250 per quarter
  - ✓ \$1,000 per year
- ✓ <https://my.rotary.org/en/rotary-direct>





# ***What is the Paul Harris Society?***



The Rotary Foundation  
La Fondation Rotary du  
Canada

## **Learn More**

- Contact:

- PHS Chair Marianne Pinkham

- 207-563-5185 or

- [mhpmerganser@outlook.com](mailto:mhpmerganser@outlook.com)

- [Paulharrissociety/rotary.org](http://Paulharrissociety/rotary.org)

- <https://my.rotary.org/en/document/paul->

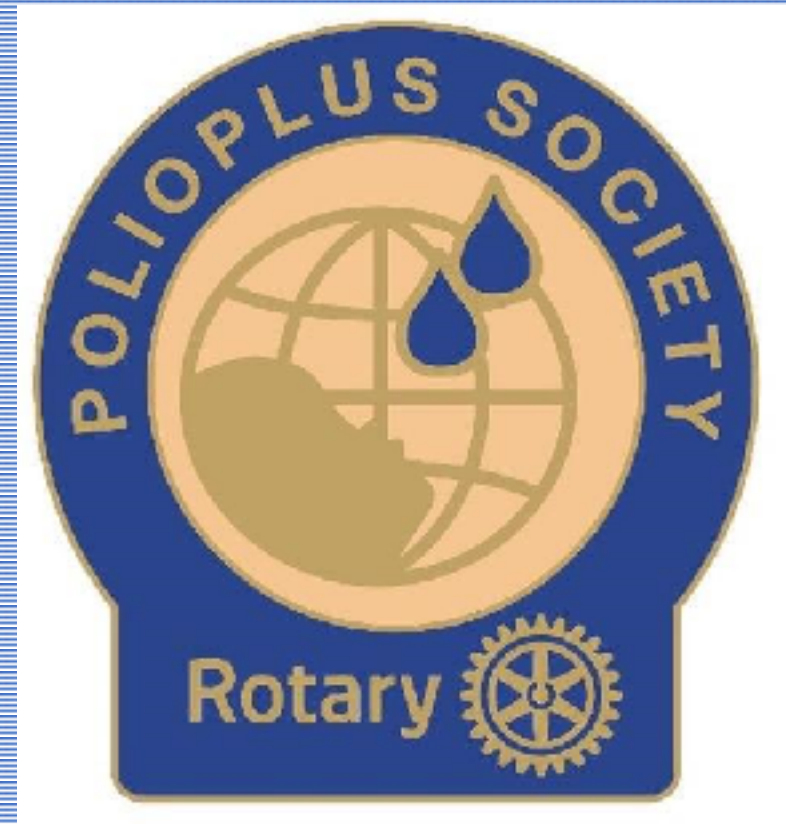
- [harris-society-promotional-handout](#)

# CLUB RECOGNITION



# POLIOPLUS SOCIETY

David Taft, Chair





# POLIOPLUS SOCIETY MEMBERSHIP FORM

*As a proud member of Rotary District 7780, I recognize it is my personal privilege to share in Rotary's effort to stamp out polio worldwide.  
I pledge my annual support to ensure that day when the world is certified polio free.  
As such, I will be designated as a  
**DISTINGUISHED MEMBER of the ROTARY DISTRICT 7780 POLIOPLUS SOCIETY***

*Understanding this is Rotary's united and #1 Priority I do hereby annually commit to:*

- ☐ Level 1 - Bronze: \$100-\$249 per year
- ☐ Level 2- Silver: \$250-\$499 per year
- ☐ Level 3- Gold: \$500-\$999 per year
- ☐ Level 4- Platinum: \$1000- up per year

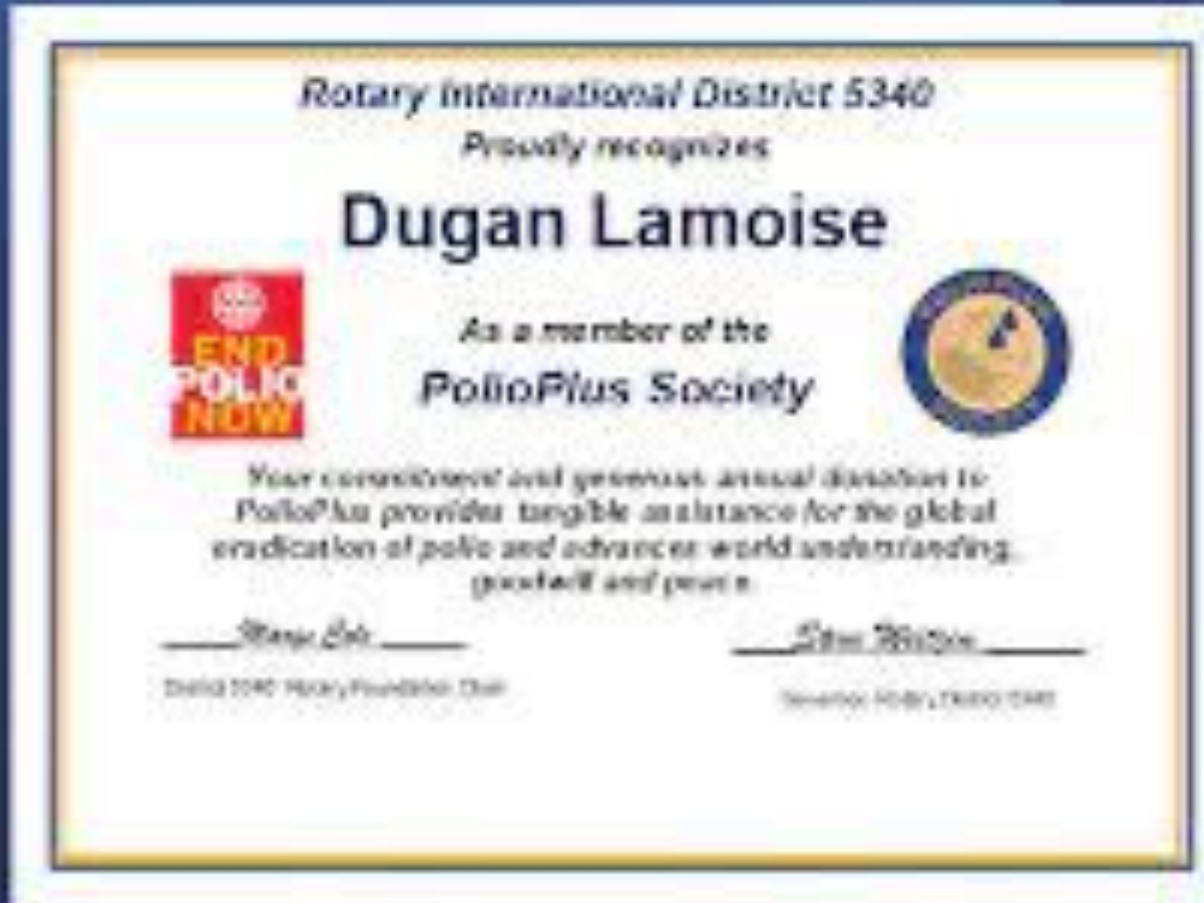
**3 Easy Ways \*\$\$PLUS to make your gifts to the PolioPlus program of The Rotary Foundation:**

1. [Click here to sign up for Rotary Direct \(on-line giving\)](#)
2. [Donate directly on line](#)
3. Make checks or drafts payable to "The Rotary Foundation" with this completed [contribution form](#) and send to The Rotary Foundation (TRF), 14280 Collections Center Dr., Chicago, IL 60693  
**\*\$\$PLUS - Your dollars are matched 2 to 1 by the Gates Foundation**

[Please print or type]

Date: \_\_\_\_\_ Name: \_\_\_\_\_

RC of: \_\_\_\_\_ Email: \_\_\_\_\_ Cell: \_\_\_\_\_



# POLIOPLUS SOCIETY MEMBER CERTIFICATES

# BEQUEST SOCIETY & ENDOWMENT GIFTS

**PDG George Rice  
&  
Patty Rice**

**Bequest Society  
Co-Chairs**

**Contribution Recognition**

- **Bequest Society:**
  - Established in Oct. 1999
  - Putting TRF in the estate plan for a minimum of US\$ 10,000
- **Six Levels:**
  - Level One: US\$ 10,000
  - Level Two: US\$ 25,000
  - Level Three: US\$ 50,000
  - Level Four: US\$ 100,000
  - Level Five: US\$ 500,000
  - Level Six: US\$ 1 million or more



 Rotary

**will you?**

Include The Rotary Foundation in your estate plans to forever be a part of Rotary's legacy of doing good in the world.

Receive a special invitation to join the Bequest Society by contacting 847-865-3100 or [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org). *Thank you.*





# BEQUEST SOCIETY FORM

out \_\_\_\_\_  
 is beneficiary designation  
 beneficiary designation  
 fund \_\_\_\_\_  
 under trust \_\_\_\_\_  
 described \_\_\_\_\_

all for recognition purposes,  
we will default to Level One.)

expenses are noted below:  
 • received an improved rental  
 of \$25,000 annually;  
 • resident with the property;  
 • a special naming opportunity;  
 • materials to his address instead

- **Native**

Receive a special invitation to join the equest Society by contacting 847-866-31 or [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org). *Thank you*

# DONOR TESTIMONIALS

## PROMOTING PEACE



"With a host of problems waiting to be solved around the world, there's almost no limit to the roles that Rotary can play. In my view, the most important long-term, fundamental service activities are those that contribute to peace. I believe that once conflicts are resolved between

nations, prosperous societies will emerge. It will be my absolute privilege if the scholarship fund that I established for peace and conflict resolution can help future leaders who'll work to reach long-term, ambitious goals. I look with great anticipation to the leadership those young people will provide."

— Shoji Akutsu, donor from Japan

## GROWING LOCAL ECONOMIES



"We strongly believe that providing opportunities to underserved people — particularly women — through financial assistance, education, and skills training is the key to improving the overall quality of life in any community. It's clear that our personal passion for supporting

women entrepreneurs is perfectly aligned with Rotary's goals to improve lives and the health of communities by providing opportunities for productive work and job advancement."

— Charles and Doreen Howey, donors from the United States

# DONOR TESTIMONIALS

## SAVING MOTHERS AND CHILDREN



"They say there are two things that define someone: your determination when you have nothing and your attitude when you have everything. ... Supporting maternal and child health initiatives provides us with the enormous power of service — to the vulnerable, the marginalized, and the weak. And it provides us with the energy that comes from knowing that we have positively impacted humanity. Contributing to The Rotary Foundation is not only our duty but truly our privilege."

— Kalashik and Gweta Manek, donors from Kenya

## FIGHTING DISEASE



"We've given consistently over the years because Rotary is our organization — we love what Rotary does and know the integrity and excellence with which they do it. Rotary-funded projects align with our hearts — with the poor, with children, with disease eradication and prevention, clean water, and public health. We also know that 95 to 98 percent of giving goes directly to a project to get things done. We're extremely proud to be a part of the work of this Service Above Self organization."

— Joel and Mary Lee Jennings, donors from the United States



# BEQUEST SOCIETY LEVELS

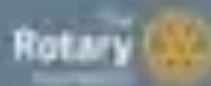
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## Bequest Society Member

The Rotary Foundation recognizes couples or individuals who have made commitment in their estate plans or endows insurance policy totaling **\$10,000 or more**

Recognition items commemorate giving at these levels:

- +Level 1: \$10,000 to \$24,999
- +Level 2: \$25,000 to \$49,999
- +Level 3: \$50,000 to \$99,999
- +Level 4: \$100,000 to \$249,999
- +Level 5: \$250,000 to \$499,999
- +Level 6: \$500,000 to \$999,999
- +Level 7: \$1,000,000 to \$2,499,999
- +Level 8: \$2,500,000 to \$4,999,999
- +Level 9: \$5,000,000 to \$9,999,999
- +Level 10: \$10,000,000 and above



# MAJOR DONOR

## WHAT...

- Accumulated Giving over \$10,000
  - **EREY / Annual Giving**
  - **Paul Harris Society**
  - **Rotary Direct**
- 4 Levels of Recognition up to \$249,999
- Arch Klumph Society start at \$250,000



## WHY...

- Sustained Giving level
- Increased Impact
- Funds More grants
- Attracts more donors







# PLANNED GIVING & LEAVING A LEGACY

[HTTPS://ROTARY.PLANMYGIFT.ORG/](https://rotary.planmygift.org/)

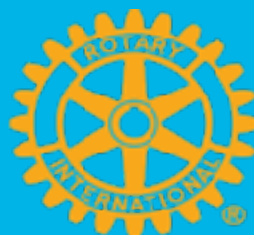
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- Wills & Estate Planning
- Many Forms of Gifts
  - Cash / Insurance policies cash value
  - IRA/401k Distributions / beneficiaries / rollovers
  - Real Estate
- Many forms... Outright / Trusts / Donor Advised Funds / Charitable Gift Annuities....
- Cash Value determines Donor's recognition levels

## •WHY...

- Meets Donors' Charitable Giving Goals
- Donors can direct gifts to their passion areas
- Long term support for Rotary humanitarian programs
- The Benefit continues long after the donation is made
- Leaves a Rotary Legacy

The  
**Rotary**  
Foundation







THANK YOU FOR DOING GOOD IN THE WORLD

# ASSISTANT GOVERNORS YOUR RESOURCE

Gregg Dowty  
Assistant Governor



Our Collective Impact  
Changes Lives



# Rotary



## District 7780 Assistant Governors

**Area 1 Portsmouth, Seacoast Portsmouth, Hampton, Exeter**

**Melissa Lesniak [mlesniak@kw.com](mailto:mlesniak@kw.com)**

**Area 2 South Berwick-Eliot, Dover, Durham-Great Bay, Rochester**

**Gregg Dowty [gdowty60@gmail.com](mailto:gdowty60@gmail.com)**

**Area 3 York, Wells, Ogunquit, Kittery, Kittery After Hours**

**Maryna Shuliakouskaya [maryna@aromajoes.com](mailto:maryna@aromajoes.com)**

**Area 4 Biddeford-Saco, Kennebunk, Kennebunk Portside, Sanford-Springvale,  
Westbrook-Gorham**

**Dennis Robillard [risc@maine.rr.com](mailto:risc@maine.rr.com)**



# Rotary



District 7780  
Assistant Governor

Area 5 Saco Bay Sunset, Scarborough, Sebago Lake-Windham, Saco Bay

Katherine Perkins [kperkins1@myfairpoint.net](mailto:kperkins1@myfairpoint.net)

Area 6 SP-Cape Elizabeth, Portland, Falmouth, Westbrook-Gorham

Frances Bagdasarian [fgbagdasarian@yahoo.com](mailto:fgbagdasarian@yahoo.com)

Area 7 Brunswick, Bruns-Coastal, Freeport, Salt Bay LEGS, Yarmouth

Carolyn Bulliner, [cbulliner@yahoo.com](mailto:cbulliner@yahoo.com)

Jerry Gould [jeremygould15@yahoo.com](mailto:jeremygould15@yahoo.com) (July, 2023)

Area 8 Bath, Bath Sunrise, Boothbay Harbor, Damariscotta-Newcastle

Lorraine Faherty [townsend13@aol.com](mailto:townsend13@aol.com)

Area 9 Bethel, Bridgton-Lake Region Fryeburg, Oxford Hills, River Valley

Michele Cole [michele@lboholdings.com](mailto:michele@lboholdings.com)



# District 7780 Goalsetting

- **Review** your past club foundation giving in Rotary Club Central found at [MyRotary.org](https://MyRotary.org)
- **Discuss** potential goals with Club Foundation Chair, Immediate Past President, Current President, and Board of Directors
- Determine **SMART Goals** for Foundation Giving and PolioPlus  
**Specific, Measurable, Achievable, Realistic, Timely**
- Enter **Club Goals** in Rotary Club Central
- **Communicate** importance of Foundation Giving and PolioPlus
- **Promote – Promote - Promote**

# Q&A / Sharing/ Closing





## DISTRICT EVENTS & RESOURCES



14 February – Mid Year Dinner & Peace Concert



20 March – Grants Training for Clubs



15 April – Training Assembly for Club Leaders

<https://www.rotary.org>

<https://rotary7780.org>