

OUR WEBINAR WILL BEGIN AT 6:00
PLEASE INTRODUCE YOURSELF
AND THEN MUTE YOUR MICROPHONE!
Please note we are RECORDING this webinar

The Rotary Foundation
Best Practices for
Club Foundation Chairs

March 29, 2017

Marty Peak Helman, District Foundation Chair

Peter Johnson, Annual Giving Chair

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If you have questions during the webinar, type them into the “chat box” and we will try to address them at the end.

March 29, 2017

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The Rotary Foundation Best Practices for Club Foundation Chairs

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Definition: The Rotary Foundation

The Rotary Foundation is the 501c3 that funds the good works Rotary does throughout the world. Includes:

- Annual Giving to the World Fund (donations count toward PHF, Major Donor credit)
- Polio Plus
- The Rotary Endowment (previously called Permanent Fund)

We are NOT talking about a club's unique charitable fund!

Why Get Involved in The Foundation?

- * Service projects are the essence of why people get involved in Rotary.
- * ROI is remarkable: Through “matching” programs:
 - * District grant funds easily double.
 - * Global Grant funds typically reach 2.5 times the club’s cash investment.

What's Your Role?

- * Ensure the club is “qualified” to participate in grant-making
- * Educate club members about The Rotary Foundation
- * Promote contributions
- * Promote grant-making
- * Participate in/promote District-wide Foundation events

CLUB QUALIFICATION

In order to manage money donated for charitable purposes, The Rotary Foundation and District require the following be done ANNUALLY:

1. A minimum of two members must take the Grants Management Seminar modules (three 20-minute modules, available 24/7 on rotary.org's Learning Center). **Must be done by April 30, 2017.**
2. Your President-elect and either you or the vice president must read, sign and be prepared to implement the MOU (available on Rotary7780.org's Foundation microsite).

More on CLUB QUALIFICATIONs

3. Establish a goal to support the Annual Fund and post it on Rotary Club Central (rotary.org's My Rotary)
 - Review Club's past giving on "Club Analysis Report"
 - Discuss goal with your President-elect and the Board
4. Appoint a Club Foundation Chair and "assign" them to that role on Club Central. Note: Best practices call for the Club Foundation Chair to be:
 - * a fairly regular meeting attendee in order to promote The Foundation and give Foundation Moments
 - * Well respected within the Club
 - * An advocate for The Foundation and a donor to The Foundation

More on CLUB QUALIFICATIONS

5. Club must be current on all International and District dues and be in good standing with the District and Rotary International.
6. Club must be current on all District and Foundation grant reporting (financial and closeout).

**Deadline to complete Grant Management modules:
April 30, 2017**

Deadline for all other requirements: June 1, 2017.

EDUCATE



Educate

Ensure that your Club Foundation Chair (or other) give a weekly “Foundation Moment” during Happy Dollars. Sources for Foundation Moments include:

- The *Rotarian* magazine
- Rotary.org newsletters (go to “News and Media” to select the ones of most interest to you)
- Rotary7780.org
- District newsletter
- Club members

Educate

Plan on *a minimum* four Foundation programs per year

- Overview and Annual Giving (Marty and Peter)
- Polio Plus (Lawrence Furbish)
- Rotary Peace Centers (Marty)
- Global Grants under development in neighboring clubs
- District Grants recently completed in neighboring clubs
- Ask Club members to share why *they* give

Promote the spending and the giving will take care of itself!

FUNDRAISE



Fundraising -- To which fund?

- * Annual Giving / World Fund
 - * This is the fund that club presidents are tasked to set a goal
 - * This is the fund that goes to EREY/Sustaining Members/PHFs
 - * This is the fund that directly results in DDF funds “returned” to the District for District grants, et cetera.
- * Polio Plus
 - * The club is asked to set a goal for Polio Plus as well
 - * All clubs are asked to give \$1500 per year
- * Endowment -- funds come in mostly through Planned Giving and Major Gifts (previously called “Permanent Fund”)

Fundraise – How?

How to get the money to The Rotary Foundation

- Rotary Direct
- On-line giving
- Check writing

Fundraise – Lead by example

Make sure both the Club and its members establish specific giving goals

- Be the first in the club to donate and ask Club President and Board to set personal goals as well.
- Honor PHFs and honor multiple PHFs even more.
((“The need never ends and neither should the giving.”))
- Ensure that Club includes The Rotary Foundation as a line item on its budget.
((Both the Club AND its members should give.))

Keep The Rotary Foundation top-of-mind in your club.

Fundraising – How?

Promote member giving through:

- Pledge card (Portsmouth club)
- Rotary Quartets (Bath club)
- Include donation in weekly meal or membership bill (Exeter club)
- Club “match” to member donations up to \$X (Boothbay Harbor club)
- Give Happy/sad dollars to TRF (Oxford Hills club)

Fundraise – Make those Donation Count!

If the donor does NOT give online, make sure he/she gets “credit” for the donation.

- Fill out “multiple donor form” if more than one check is mailed to The Rotary Foundation.
- “Multiple donor form” and “single donor form” are both available on home page of District website as well as on rotary.org

Fundraise: Who are the Prospectives?

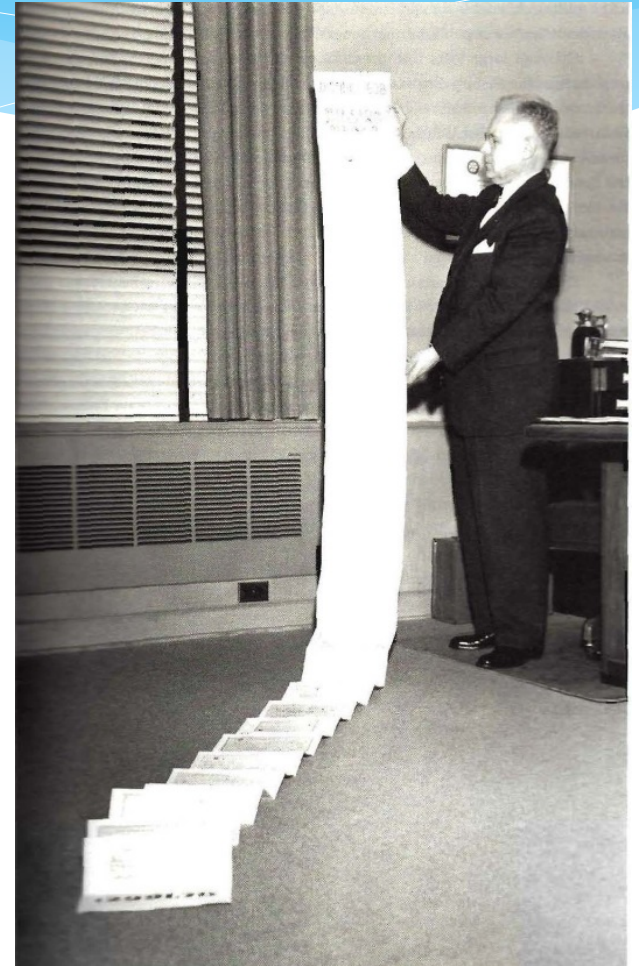
- * New members – need to educate
- * Ongoing givers – need to remind and honor
- * Longtime members who never gave – need to educate in more compelling way
- * Longtime members who have stopped giving – need to find out why
- * Potential Major Donors and Bequest Society members – ask for support from District

Educate AND Fundraise

At one of those Foundation programs ...

Organize a pot luck/BYO bag lunch and collect meal money for The Rotary Foundation.

Photo: RI general secretary George Means with checks sent by Rotarians in lieu of meals in 1961.



PROMOTE SPENDING



Promote Spending: Grants

- * Global Grants – large, multiyear grants typically involving more than one club or District in US, paired with a club in a developing nation.
- * District Grants – small club-based projects that are completed within Rotary year.

Learn about both via Grant Management Modules on RI's Learning Center: learn.rotary.org

SUPPORT FOUNDATION EVENTS

Promote District and Global Grants

Promote District events in 2017-18:

- * October 21, 2017: Club events to commemorate World Polio Day
- * November 10, 2017: By-Invitation-Only evening with Past RI vice president Jennifer Jones
- February 23, 2018: “Frugal Feast” in commemoration of World Understanding and Peace Day at Woodford’s Church, Portland



Resources

- * Foundation “microsite” on District website (drop-down tab)
- * 2017-18 Rotary Foundation Grants folder (snail-mailed to first person in each club who completes grants modules)
- * Club Foundation Committee Manual (download from rotary.org; search for 226E-en)
- * Rotary Foundation Facts 2016 (search for 159-en).
- * Reports on rotary.org’s Foundation pages:
 - * Club Fundraising Analysis
 - * Club Recognition Survey

Resources – District Foundation Committee

Marty Helman, District Foundation Chair: martyrotary@gmail.com

Peter Johnson, Annual Giving Chair: peter.johnson@ubs.com

Lawrence Furbish, PolioPlus Chair: lkfurbish@me.com

Mae Bradshaw, Global Grants Chair: maebradshaw@comcast.net

Betty Hughes, District Grants Chair: esh1508@myfairpoint.net

**Where to send grants applications and MOUs:
grants@rotary7780.org**

Upcoming Training and Deadlines

- * Saturday, April 8 : District Assembly, USM in Portland
 - * Open Q&A on Global and District grants – bring your questions!

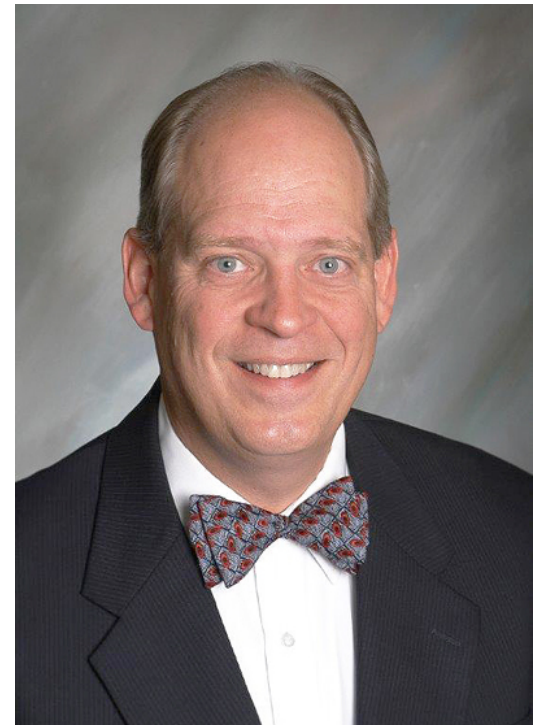
Remember the deadlines:

- * April 30 – last day to take online Grants Management Seminar!
- * June 1 – deadline for applying for District Grant via grants@rotary7780.org

Questions?



Marty Helman
District Foundation
Chair



Peter Johnson
Annual Giving
Chair