

FROM: Steve Wright, DGE

TO: President-elects, Assistant Governors

DATE: Feb. 10, 2024

RE: Plan for The Rotary Foundation in District 5150 – Rotary Year 2024-2025

The fund-raising required for The Rotary Foundation (TRF) from our members and clubs is an integral part of all the good that Rotary does in our world. The International in Rotary International only succeeds because of the incredible generosity of our members.

The District, however, should never compete with the clubs when raising funds for all that the clubs do for our world. Many, if not most of the clubs have their own foundations, and these two sources should be seen as complimentary to each other, not competitive.

The plan consists of general aims consistent with addressing several facts with a desire to capitalize on improvement. Emphasis on growth aimed at the future, recognition of current donors and those donating to the future are key parts of the plan. The desire is to keep TRF as a part of Rotary in the district, and not the sole focus.

As part of this presentation, attached is a District Trends in Annual Fund Giving. The Trends report is presented as an indicator, a guide to the importance of the \$100 and \$1,000 donors, and nothing else.

**FACTS:**

If a donor is motivated to donate any amount twice within 18 months, Rotary will have a life-long donor.

- 2) On average, a Rotarian is a member for 3 years before he/she donates to The Rotary Foundation.
- 3) There is confusion between The Rotary Foundation and individual club foundations.
- 4) There is constant confusion in many clubs regarding our Every Rotarian Every Year (EREY) campaign, the tickets we sell for the annual campaign and how that all works. Part of this confusion is the turnover in leadership inherent in the Rotary world. Another part is the club propensity in slotting newer members in TRF club roles without sufficient training at the club or district level. Finally, a key part of the confusion is newer Rotarians being named club presidents, and that we can address.

**PLAN:**

Starting on July 1, 2024, the Foundation Team, consisting of the District TRF Chair (Gary), the Area Foundation Coordinators(AFCs), the Club Foundation Chairs, the District EREY Team and AGs as needed will be physically meeting with the clubs with a brief generalized explanation and pitch to push EREY.

- 1) The team will be selected and trained by Gary with input from Steve in May/June 2024 so with July 2024 they can start the process of physically visiting the clubs and working with the Club Foundation Chair in explaining EREY and the impact of donor giving.
- 2) The goal for the teams will be to explain EREY, solicit donations, use the pitch approach to open the door to greater involvement by the district in club training for TRF and to be of complete assistance to the club foundation chairs.
- 3) The tickets for the annual EREY drawing will be printed (one sheet of ten tickets per member) and provided by the District and ready for dissemination with these club visits. Extra sheets will be available upon request from the EREY Team.
- 4) The entire club visit process should commence roughly July 1, and finalize no later than September 15, 2024, which allows plenty of time before the Annual Foundation Event on October 12, 2024.
- 5) The goal is still to become a 100% EREY District.
  - A) We will still use the base amount of \$25.00 as the qualifying dollar donation that qualifies a member for EREY status. However, the amount we will solicit will be \$51.50 for EREY donations. This amount is small enough to remain feasible yet is a significant and easily remembered amount that might foster future donations (hence the two donations within 18 months) should Mitone choose to continue the concept.
  - B) This attempt also increases the total amount that will be donated for Annual Fund if the concept is successful.
  - C) The \$51.50 or additional increments will qualify the donor for one EREY drawing ticket per \$25.00, or two (2) tickets for each \$51.50 donated.
- 6) Gary and/or his team provide a full Guest Speaker slot if requested.
- 7) Part of this effort will include Paul Harris points provided by Steve and Colleen Wright. We will donate 100 of our personal points to any first-time donor to TRF with their initial donation in the amount of \$100 cash. Assuming we run out of our personal points, we will then start using other sources of points for any additional initial TRF donors.
- 8) The 3-year email campaign will be made a part of this overall EREY push. This plan is a method shared by TRF where we email those that donated 3 years ago and share with them where their donations were put to work. What projects were conducted by D5150 in both Global and District Grant awards that used their donations? The obvious concept is to say: "You donated 3 years, ago, thanks, here's how we spent the money, and???" This can be either a simple series of emails to all donors 3 years ago, or possibly tailored to the specific donors by club to coincide with the club presentation by Gary's team.

## **FOUNDATION EVENT:**

Our Foundation Event this year is a lunch on the USS Hornet, with the Hornet open to all attendees from 11 AM to 5 PM. The day was selected as the Blue Angels are scheduled for their annual Fleet Week flyover. The contract has been signed, and attendees will have (at no additional cost) the option of guided tours of the ship by docents who are military veterans. All areas of the ship that are normally open to the public will be open to our attendees. Pricing includes a tri-steak sandwich lunch (with appropriate vegan, etc. menu options), wine and beer on the fantail, an Andrews Sisters-type live trio and a very short presentation of some sort.

1) Pricing is set currently at \$99.00 for Rotarians, and \$79.00 for veterans who are not currently Rotarians, with an eye towards possible membership.

2) There is a larger concentration of veterans in Rotary membership than there are in the general population. The discounted price for veterans is support for a secondary goal with this event to potentially generate Rotary membership. Specific outreach will be a part of the Hornet event to veterans.

3) The annual EREY drawing winners will be posted on the USS Hornet at this event.

## **MAJOR GIFTS:**

There is always a possibility that circumstances will develop in 24-25 that will be conducive to small gatherings for selected potential Major Donors to gather with significant RI or TRF leaders. Should that possibility develop, we have budgeted funds as appropriate for the opportunity

## **BEQUEST SOCIETY:**

There will be a concerted effort to enhance membership in the Bequest Society. This will be done through:

- 1) The July-September period with the EREY Teams noted above;
- 2) DG Visits, the normal visit by the DG to all of the clubs;
- 3) Ongoing efforts through the year with efforts through the club foundation chairs as supported by TRF Chair Gary, the AFCs and the Legacy Chair.
- 4) Additional effort and planning are needed in this area to achieve what could and should be a significant increase in Bequest Society membership.
- 5) Additional effort must be made to educate new and existing Bequest Society members about the mechanics of the actual donation when that time comes. If the funds are merely sent to TRF, and there is no indication of anything to the contrary, TRF deposits the bequest into the World Fund and there is no ongoing Shared Amount back to District DDF. The bequest, when

submitted, must be sent with specific instructions that are accurate and reflect the wishes of the donor. We need to ascertain those wishes now – as later is a bit too late, shall we say.

### **CORPORATE MATCHES:**

The district needs to encourage all donors who are currently employed to determine if their respective employers have donor-matching. This could potentially open new avenues of revenue for TRF. Gary Chow will be working on this along with his team.

### **POLIO PLUS:**

Many of our fellow Rotarians hold their donations to PolioPlus as a sacred part of their membership. The effort in this realm for 24-25 will consist of three elements: 1) The Grand Slam, which emphasizes the PolioPlus Society; 2) The Foundation Cruise, which has plans to donate all proceeds from the Foundation Cruise to PolioPlus; and 3) The ongoing support given to PolioPlus by our members.

We will also make available the information that we receive at the district level from the Golden Gate Bridge Walk on Oct. 19, which is sponsored by Rotary D 5230.

We will in addition encourage each club to choose what the club wishes to do for World Polio Day on October 24, 2024.

### **RECOGNITION:**

- 1) The key new element will be the unveiling of The Grand Slam pin. The pin will be presented to all Rotarians who are Major Donors, members of the Bequest Society, members of the Paul Harris Society and members of the PolioPlus Society. The initial presentations of the pins will probably be at the USS Hornet Foundation Event.
- 2) A Major Donor Lunch is being planned with a tentative date of April 26, 2025. The concept at this time is still in the process of being finalized.
- 3) Individual new Major Donors and Bequest Society members, and new levels for both, will be recognized, when possible, by personal visits by the DG and TRF Chair with the appropriate presentations. They will also be recognized at the Major Donor Reception.
- 4) A personal thank you note will be sent by the DG.

### **CONCLUSION:**

Everything above ultimately requires education, recognition, rewards, and gratitude We need to focus our efforts on specific and limited events, education of all of the means available for giving, constant recognition of our donors, the expression of gratitude for their generosity and the celebration of the joy we all feel when our efforts Do Good in the World.

# DISTRICT TRENDS IN ANNUAL FUND GIVING

Giving level	2020-21		2021-22		2022-2023	
	Donor Total	Dollar Total	Donor Total	Dollar Total	Donor Total	Dollar Total
\$10,000+	2	22,200	8	528,8762	6	147,099
\$5,000	9	52,471	9	47,037	6	35,690
\$1,000	120	164,694	148	211,006	147	193,462
\$500	88	53,007	104	64,387	82	50,340
\$100	664	133,085	552	118,127	534	114,166
\$50	62	3,355	76	4,225	72	3,856
\$25	172	4,525	216	5,535	370	9,370
\$1	6	90	6	107	2	21