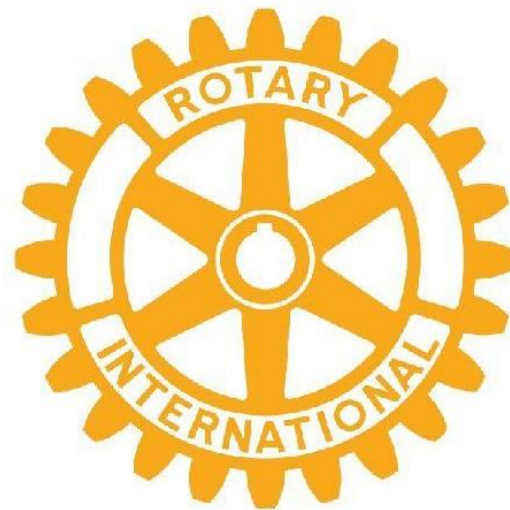


The **Rotary** Foundation



District 5870 Rotary Foundation Training
August 28, 2021



Zoom Etiquette

Please rename yourself – Your First and Last Name, Club, Job:
i.e. **John Smith, RC Austin, Foundation Chair**

Let's agree to:



Mute when
not talking



Turn the
camera on



Be fully present

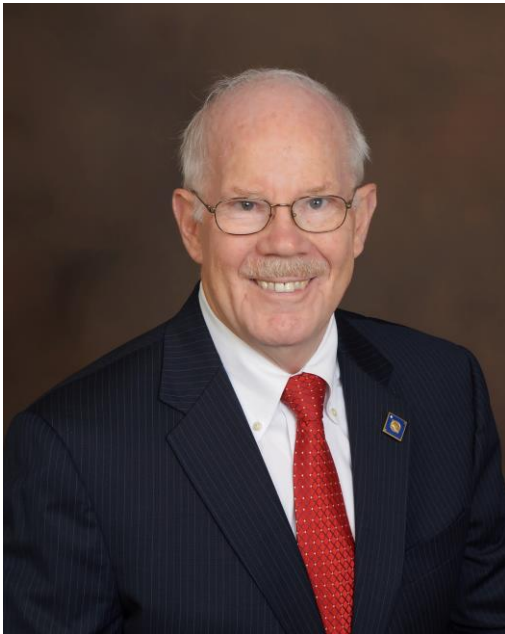


Raise hands to
contribute or comment



Speak and listen
with kindness

Introduction



PDG Jerry Chapman
District Rotary Foundation Chair

11558 Spicewood Pkwy, Unit 15
Austin, TX 78750

Mobile: 512-657-9085
Email: jwchap@yahoo.com

Introduction



George Lourigan
Annual Fund Subcommittee Chair

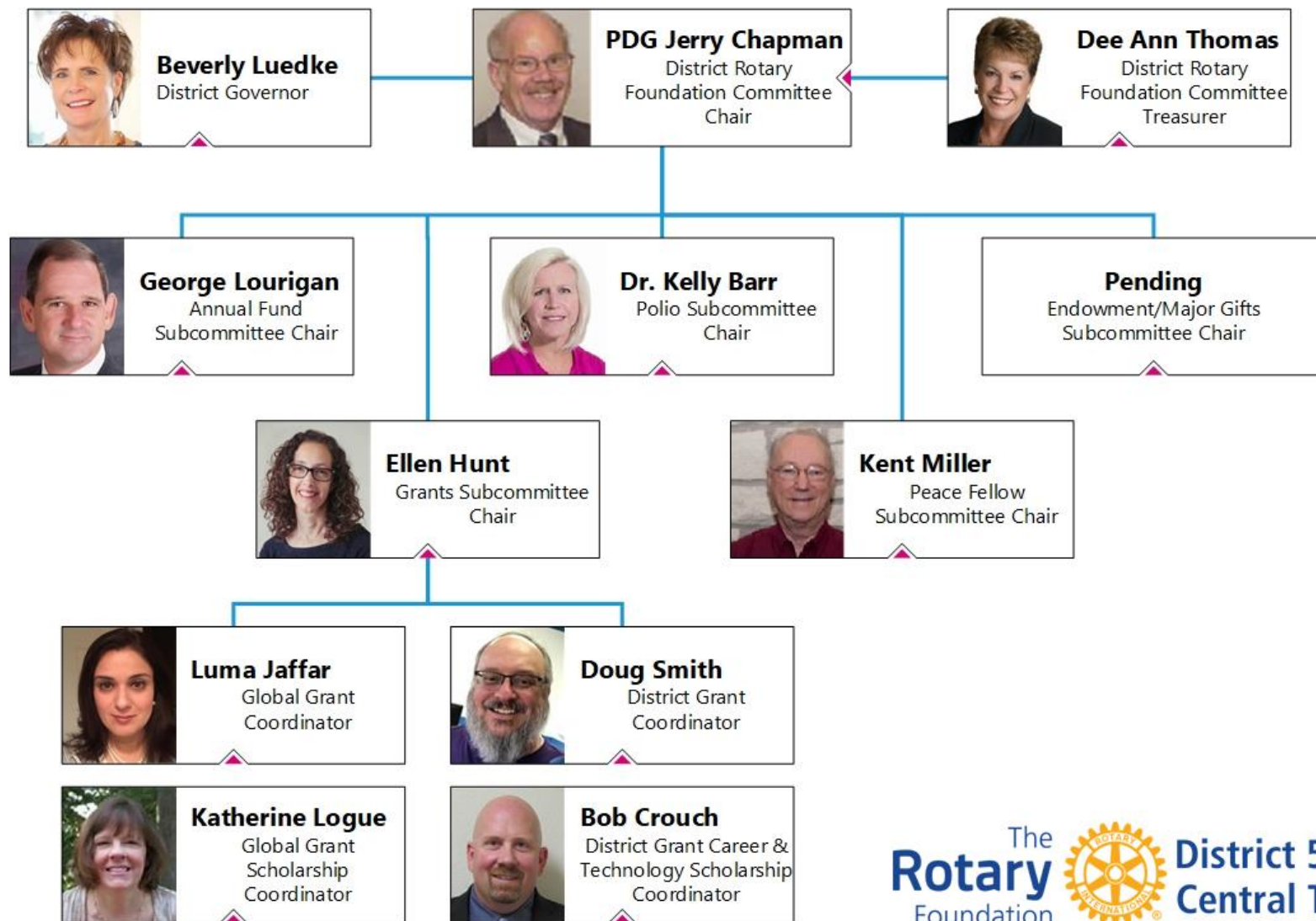
Rotary Club of Georgetown

Mobile: 512-635-3329

Email:

George@georgelourigan.com

Your District Rotary Foundation Team



The Foundation's Mission

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



Agenda

- Rotary Foundation Funds
 - Annual Fund
 - Endowment Fund
 - Disaster Response Fund
 - Polio Fund
- Rotary Peace Centers
- Recognition, Banners & Points
- Ways to Give
- Foundation Reports
- What counts for what
- What you can do to help
- District Giving Incentives
- Grant Updates

ROTARY FOUNDATION FUNDS

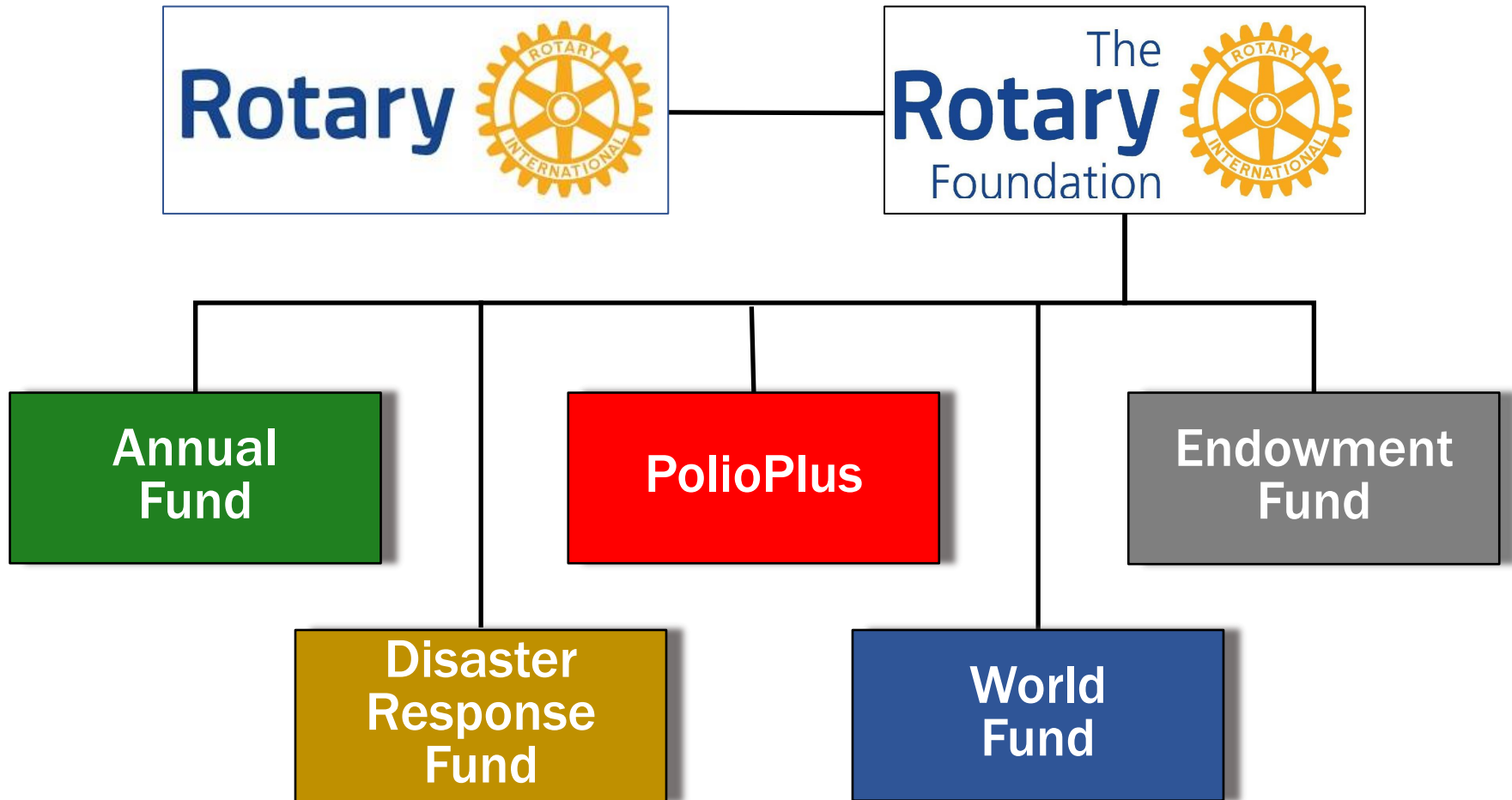
The
Rotary
Foundation



The
Rotary
Foundation



Rotary Foundation Funds



Multiple funds working toward a common goal

Your Rotary Foundation

It's an organization you can support with confidence.

In 2019-20, our Foundation dedicated about **91%** of its total spending to program awards (85%) and operations (6%), far exceeding the efficiency standards set by independent charity-rating services.

PolioPlus	42%	Other Grants	4%
Global Grants	27%	Disaster Response	2%
District Grants	9%	Peace Centers	1%
Operations	6%		

Outstanding Performance



Named the **2016 World's Outstanding Foundation** by the Association of Fundraising Professionals



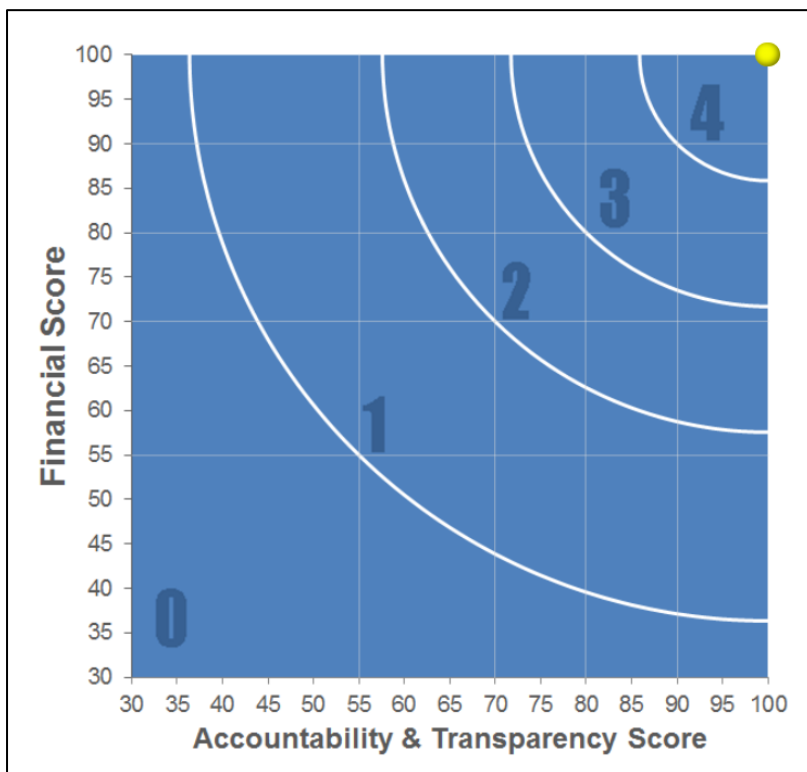
Named a **Four Star Charity** with a **perfect 100 point overall score** by Charity Navigator - less than 1 percent of the charities it rates have earned a perfect score

A Charity You Can Trust

Charity Navigator

PERFECT 100

	Score (out of 100)	Rating
Overall Score & Rating	100.00	★★★★★
Financial	100.00	★★★★
Accountability & Transparency	100.00	★★★★



10 of the Best Charities Everyone's Heard Of

Rank	Charity	Overall Score
1	Direct Relief	100
2	Ronald McDonald House Charities, Inc.	100
3	The Rotary Foundation of Rotary International	100
4	Matthew 25: Ministries	100
5	Vitamin Angels	98.23
6	World Resources Institute	98.23
7	Samaritan's Purse	98.23
8	Cystic Fibrosis Foundation	98.21
9	Catholic Medical Mission Board	97.87
10	Patient Advocate Foundation	96.66

THE ANNUAL FUND

The
Rotary
Foundation



The
Rotary
Foundation



The Annual Fund

(AF)

- Provides “*Support for Today*”
- Unrestricted giving ... Checking Account
- Contributions to the Annual Fund are the primary source of funding for most Foundation programs.
- A donation to the Annual Fund can be directed to:
 - SHARE
 - ☐ **47.5% of comes back to the district and its clubs in three years**
 - ☐ 47.5% goes to the World Fund
 - World Fund or Areas of Focus



BE IMPACTFUL

The
Rotary
Foundation



The
Rotary
Foundation



Why it Makes Sense

Your contributions to the Annual Fund help to –

PROMOTE PEACE



SUPPORT QUALITY EDUCATION



FIGHT DISEASE



PROVIDE CLEAN WATER, SANITATION AND HYGIENE



SAVE MOTHERS AND CHILDREN



GROW LOCAL ECONOMIES



Why it Makes Sense

Your contributions to the Annual Fund help to –

**SUPPORT THE
ENVIRONMENT**



ERADICATE POLIO



RESPOND TO DISASTER



**THE BEST WAY TO FIND YOURSELF
IS TO LOSE YOURSELF IN THE
SERVICE OF OTHERS.**

Mohandas Gandhi

Impact of our Rotary Foundation

Global Grants Awarded (by Area of Focus)

	<u>Number of Grants</u>	<u>Funding (in millions)</u>
Basic Education and Literacy	113	\$7.8
Disease Prevention and Treatment	729	\$59.4
Community Economic Development	170	\$11.9
Maternal and Child Health	101	\$8.9
Peacebuilding and Conflict Prevention	57	\$2.7
Water, Sanitation and Hygiene	<u>189</u>	<u>\$15.3</u>
	1,359	\$106.0

As of 30 June 2020

SHARE

The
Rotary
Foundation

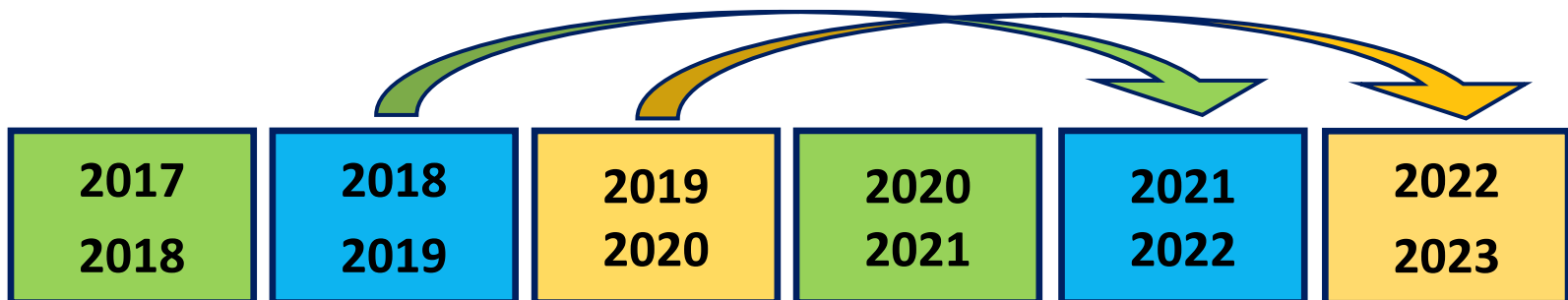


The
Rotary
Foundation



The SHARE System

- SHARE is the mechanism by which Foundation funding is distributed worldwide.
- Districts share in the decision-making process by choosing which programs they wish to support and in which they want to participate.
- Funds from the Annual Fund are available to districts three years after they are contributed.



The SHARE System

for Rotary Year 2021-22



50% to District
Designated Fund's

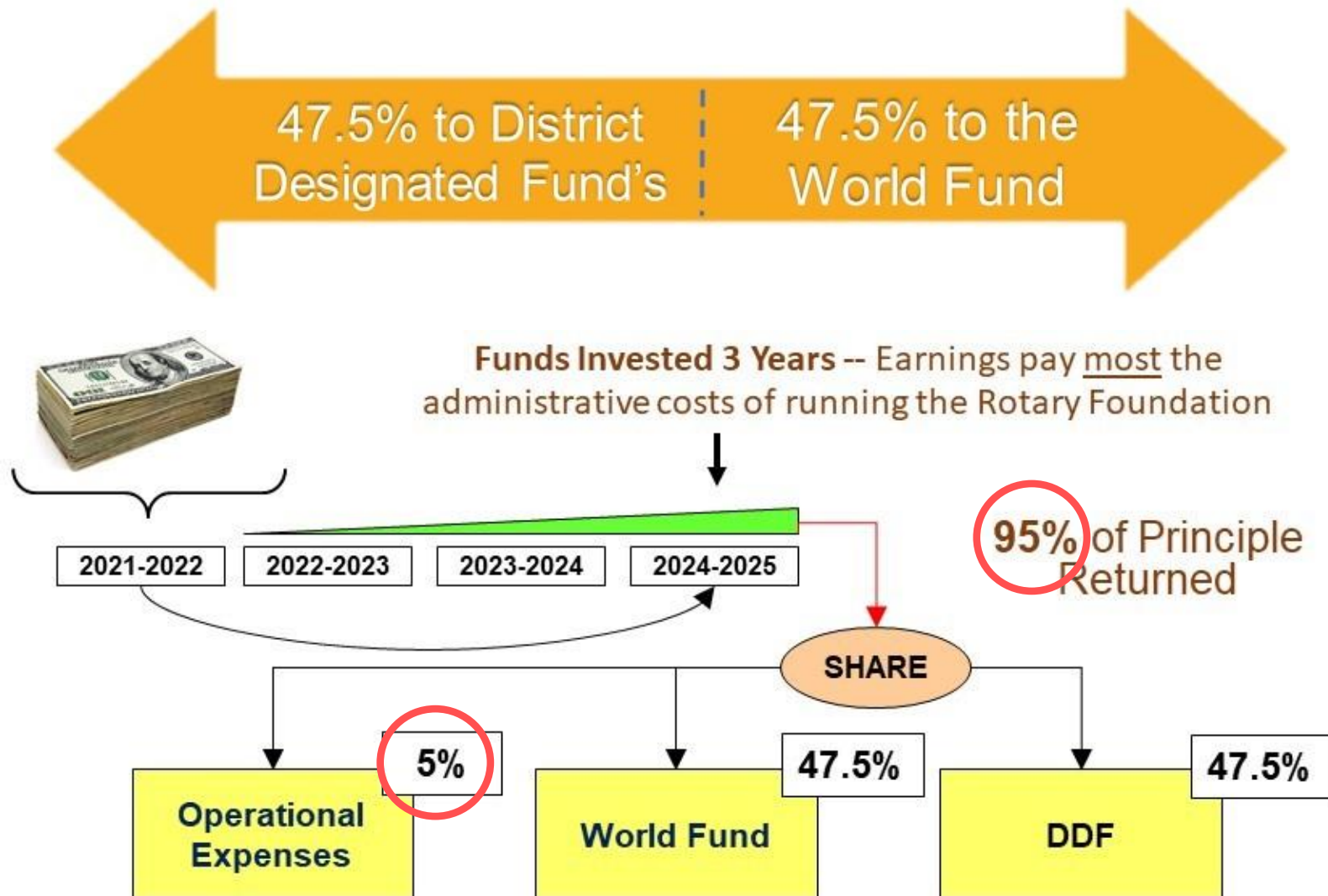
- Directed by the district
- Funds district grants
- Funds global grants

50% to the
World Fund

- Supports worldwide Foundation activities
- Provides matching funds for global grants
- Used where Trustees see the greatest need

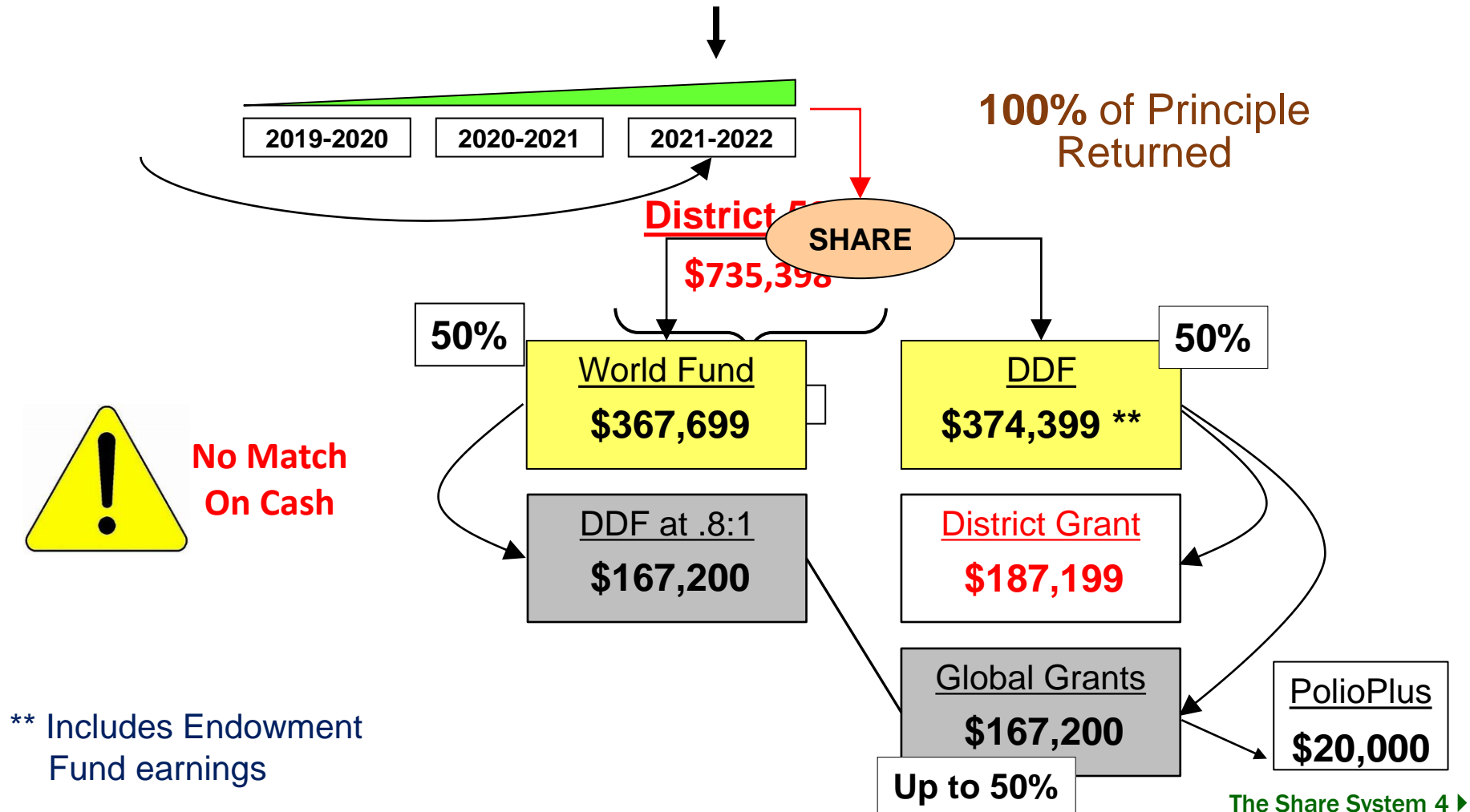
The SHARE System

New Split Effective July 1, 2021



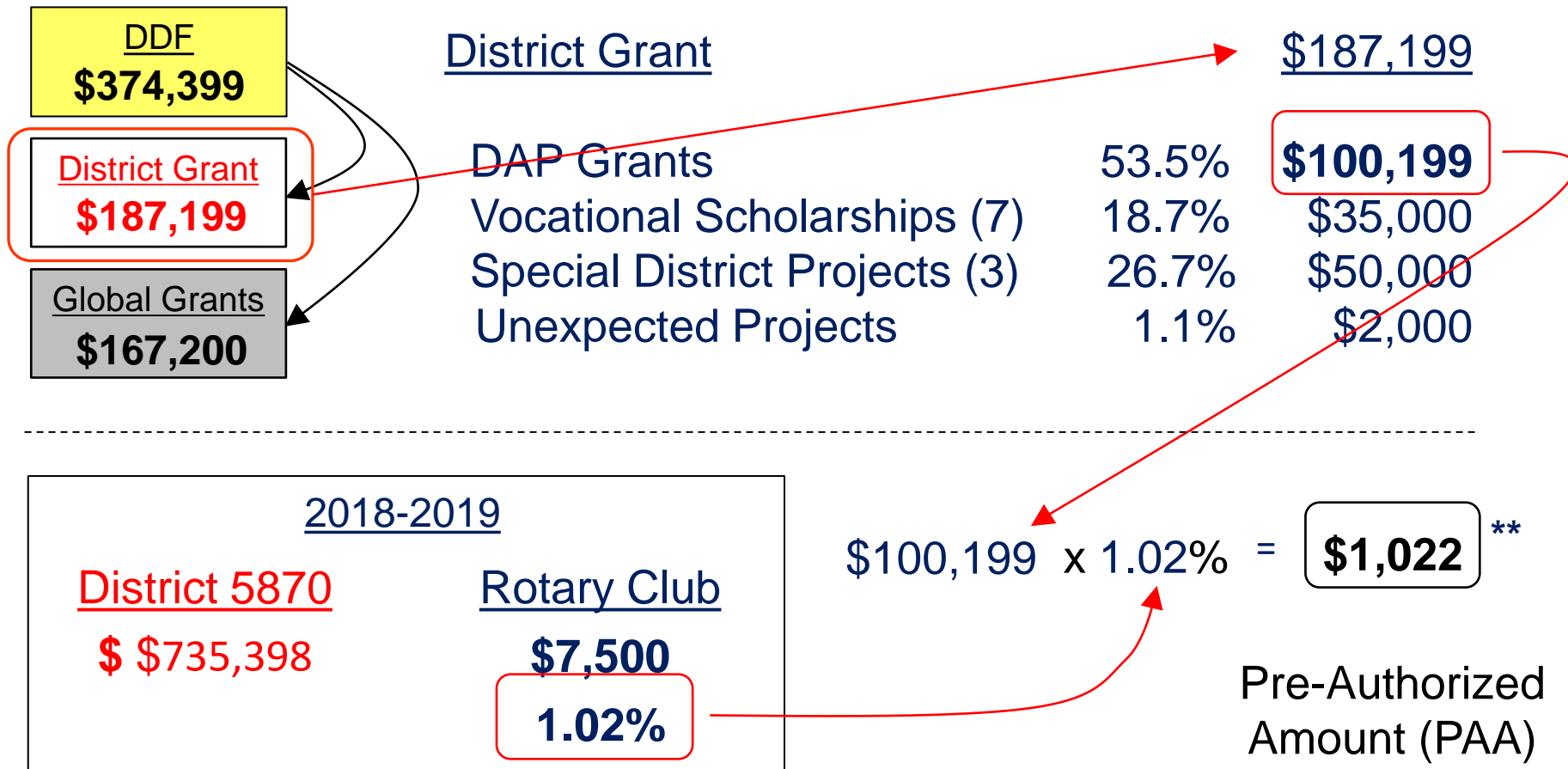
The SHARE System for Rotary Year 2021-22

Funds Invested 3 Years -- Earnings pay the administrative costs of running the Rotary Foundation



The SHARE System

Your Pre-Authorized Amount



**** Can be increased if your club (1) has a strong 5-year per capita giving history and (2) you agree to attain at least a \$100 per capita in 2021-22**

THE ENDOWMENT FUND

The
Rotary
Foundation



The
Rotary
Foundation



The Endowment Fund

(EF)

- Provides “Support for Tomorrow”
- Restricted giving ... ensures the long-term viability of the Rotary Foundation
- Fund earnings are used to expand existing programs and underwrite new ones
- The Trustees annually determine the percentage of earnings to be distributed through SHARE to both DDF and the World Fund



Endowment Fund

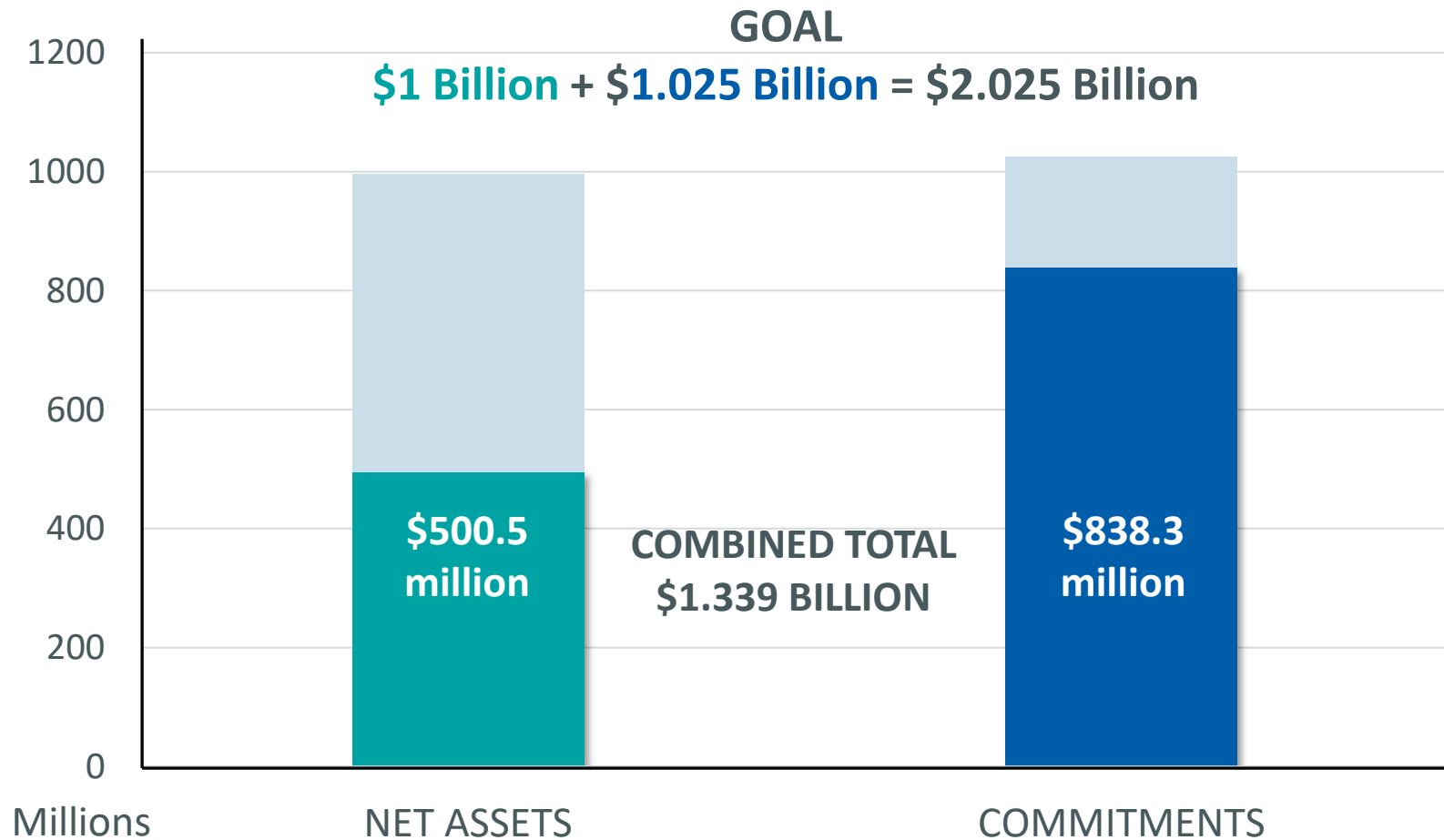
Creating a Legacy

- The principal of a contribution to the Endowment Fund is never spent.
- A portion of the earnings is made available annually for specific program activities.
- A commitment or gift of any amount can be directed to:
 - World Fund
 - Annual Fund-SHARE
 - Peace Centers
 - Polio
 - Seven Areas of Focus



Building Rotary's Endowment

\$2.025 Billion by 2025



Net asset and commitments as of 30 June 2020

Planned Giving

Creating a Legacy

- Donors can create a living legacy that will provide ongoing support to Rotary programs after their lifetime.
 - Individuals can structure gifts that may provide financial and tax benefits, such as:
 - Charitable Gift Annuities (immediate and deferred)
 - Charitable Remainder Trusts
 - Life Income Agreement
 - Pooled Income Fund
 - Donor Advised Fund
- Rotary's tomorrow depends
on what we do today**

Giving Opportunities

Creating a Legacy

Giving opportunities

The most common gift structure is a provision in an estate plan. Opportunities include:

- An outright contribution – cash, securities, real estate, jewelry
- A provision in a will or a trust
- Insurance beneficiary designations
- Real estate and other tangible asset transfers
- Gifts of retirement plan assets or other financial accounts – stocks, bonds, etc.

Naming Opportunities

Creating a Legacy

Naming Opportunities

Create a lasting legacy in your own name, or to honor a loved one. See the impact of your gift and watch it grow over time.

An endowed fund created with a minimum gift of \$25,000 can support one or more of the following:

- Activity (Grants, scholarships, or vocation training teams)
- Rotary Causes (Rotary's Seven Areas of Focus, Polio, Disasters)
- Your District
- Geographic location (such as Africa, Asia, or Latin America)

Endowment Recognition

Creating a Legacy



Rotary Benefactor

- \$1,000 pledge or contribution to the Endowment Fund



Bequest Society

- A minimum \$10,000 pledge or contribution to the Endowment Fund
- Additional cumulative pledges or contributions are recognized at \$25,000, \$50,000, \$100,000, and \$500,000

Legacy Society (new as of July 1, 2019)

- \$1,000,000+ pledge or contribution to the Endowment Fund

Endowment Recognition

Creating a Legacy

100% Rotary's Promise Club

- A designation provided to clubs in which every dues paying member supports The Rotary Foundation's Endowment with a minimum commitment of \$1,000 or more in an estate plan or via an outright gift of \$1,000 or more
- A certificate honoring the achievement will be provided upon request

How to Proceed

Creating a Legacy

- The Foundation cannot provide legal or financial advice - Consult your legal representative or financial adviser to determine the most appropriate way for you to give.
- Do you want to have a preliminary confidential discussion regarding options?

Please contact

DRFC Jerry Chapman, jwchap@yahoo.com

PGO Rebecca Tanaka, rebecca.Tanaka@rotary.org

POLIOPLUS & THE DISASTER RESPONSE FUND

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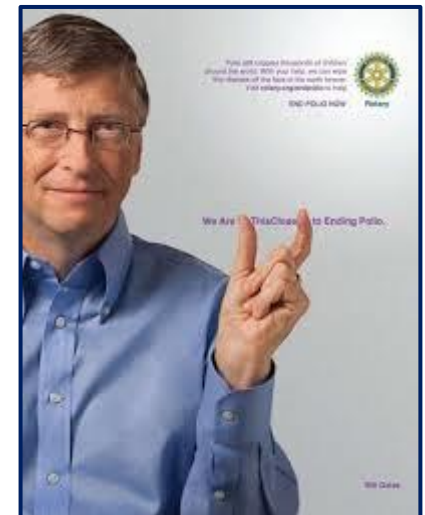


The
Rotary
Foundation



PolioPlus Fund (PF)

- Provides “*Support for Eliminating Poliomyelitis*”
- Restricted giving ... used exclusively to support GPEI immunization and surveillance efforts.
- Ending Polio Now is **Rotary’s number one priority**
- Founding partner of the Global Polio Eradication Initiative – WHO, US CDC, GAVI, Rotary International, UNICEF, and the Bill & Melinda Gates Foundation
- We have help immunize more than **2.5 billion** children in 122 countries



Progress in the Fight to End Polio



Progress in the Fight to End Polio

IMPACT OF A POLIO-FREE AFRICA

How eradication efforts have improved global health



People respond faster and smarter

Health workers and community mobilizers have better training to reach all children.



Health networks collect and analyze information quickly.

Response teams are in place to mobilize during outbreaks.



Health systems work better



Hospitals have procedures for reporting cases of disease.



Emergency operations centers are in place.



Hard-to-reach communities have improved health infrastructure.

endpolio.org

Progress in the Fight to End Polio

By the Numbers



Average cost to
fully protect a
child against polio

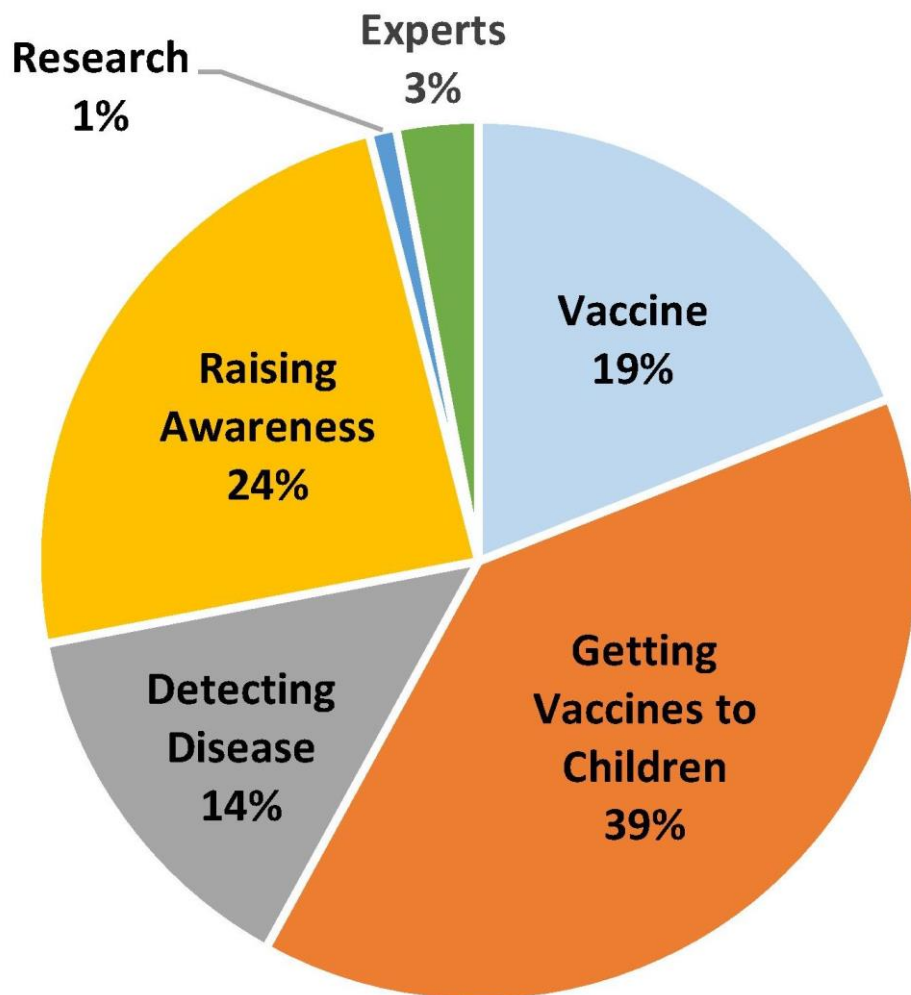


Children vaccinated in
up to 40 countries
every year



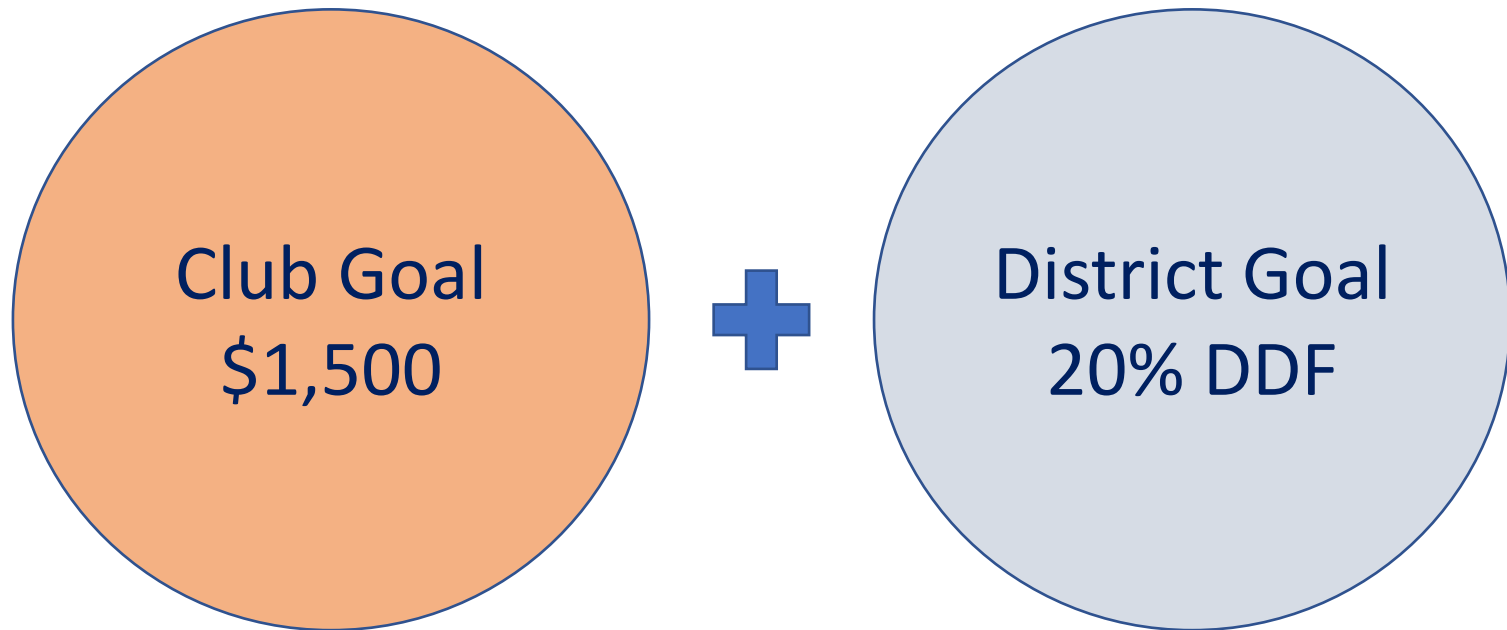
Annual total cost
to conduct polio
surveillance
worldwide

How Rotary's \$150 Million Was Used For Polio Grants in 2019-20



Getting Vaccines to Children	\$58,500,000
Raising Awareness	\$36,000,000
Vaccine	\$28,500,000
Detecting Disease	\$21,000,000
Experts	\$4,500,000
Research	\$1,500,000
	<hr/>
	\$150,000,000

Help Rotary Meet Its Goal Of \$50 Million



Matched 50% by the
World Fund

PolioPlus Society

A recognition of donors
who make an annual
contribution to PolioPlus



WORLD POLIO DAY
IS 24 OCTOBER

endpolio.org | [#endpolio](https://twitter.com/endpolio)



The Disaster Response Fund (DRF)

- Provides “*Support for Disaster Recovery*”
- Restricted giving ... Rotary’s mechanism to support disaster recovery and rebuilding efforts
- Contributions cannot be directed to a specific disaster - YET
- The DRF funds Disaster Response Grants
 - ✓ Only Districts can apply
 - ✓ Up to \$25,000



ROTARY PEACE CENTERS

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The
Rotary
Foundation

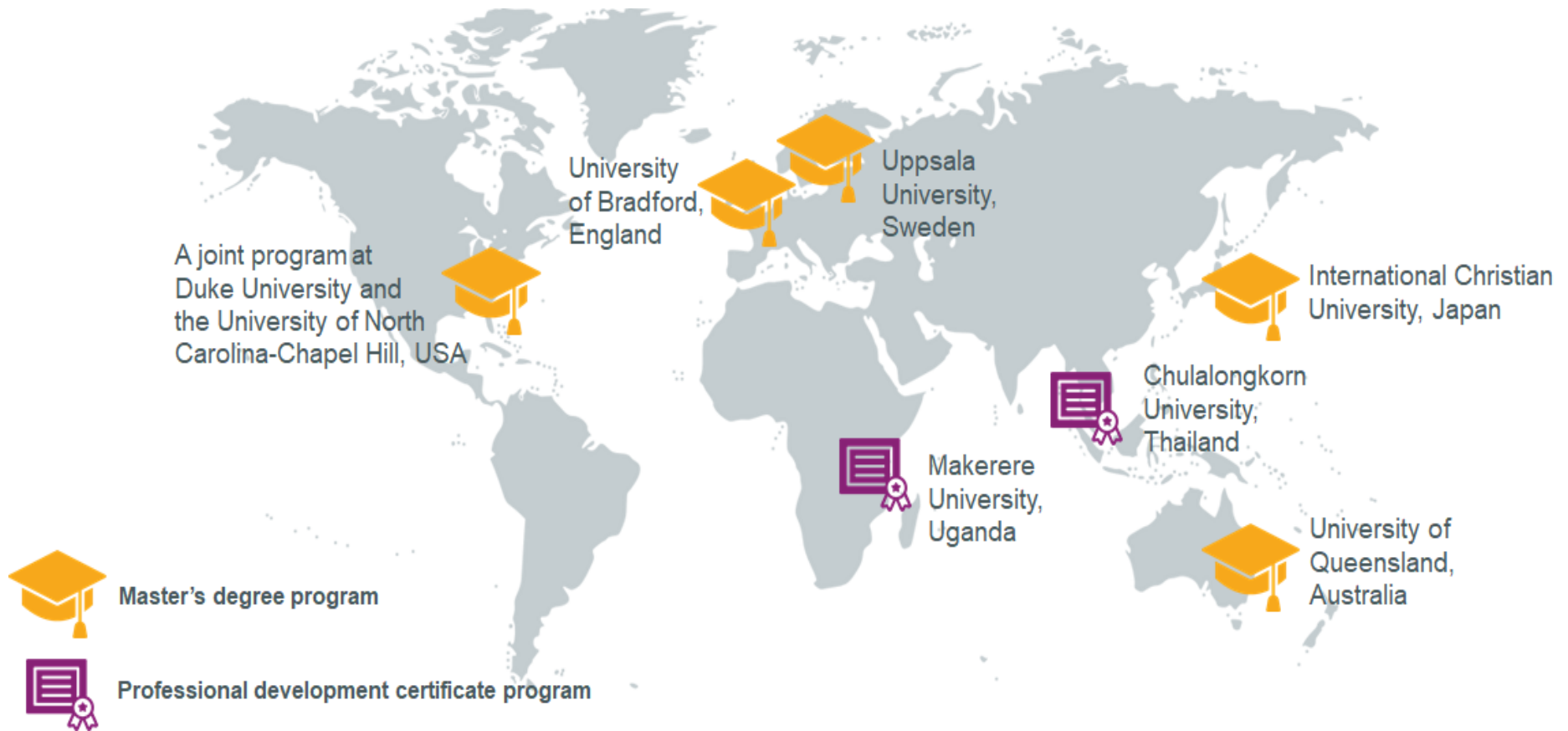


Rotary Peace Centers

- Each year, Rotary awards up to 130 fully funded fellowships for dedicated leaders from around the world to study at one of our peace centers.
- Through academic training, practice, and global networking opportunities, the Rotary Peace Centers program develops the capacity of peace and development professionals or practitioners to become experienced and effective catalysts for peace.



Rotary Peace Centers





15 minutes



RECOGNITION, BANNERS & POINTS

The
Rotary
Foundation



The
Rotary
Foundation



Every Rotarian, Every Year

(\$25 per year)

Every Rotarian, Every Year (**EREY**) seeks to engage every Rotarian in the life-changing programs of our Foundation by encouraging them to --

- ✓ Get involved in a Foundation project or program every year
- ✓ Contribute **\$25** or more each year to the Annual Fund

When every Rotarian gives every year, it makes Doing Good in the World possible



Sustaining Member

(\$100 per year)

- Contribute **\$100** or more each year to the Annual Fund.
- **\$100** comes to roughly **\$2** per week – who doesn't spend at least that much each week on things they can't even remember?
- Donors who gave between \$100 and \$249 contributed over \$25 million to the Foundation last year.

SUSTAINING MEMBERS

Help make a world of difference to the lives of others

What's \$100 per year?

- **\$25.00** per quarter
- **\$8.33** per month
- **\$1.92** per week
- **\$0.27** per day

What Sustaining Contributions Can Do

What can The Rotary Foundation do with your \$2 a week (\$100 per year) gift?

- Provide 3 cataract surgeries in India
- Plant 100 trees in Indonesia
- Buy 15 packets of teaching materials for a school in Costa Rica
- Provide 50 children's books in the United States
- Feed a family in India or Pakistan for 6 months
- Bring clean water to 600 school age children in Africa
- Buy 2 desks for an elementary school in Honduras
- Provide 50 mosquito nets for women and children in Tanzania

Paul Harris Fellow (PHF)

- Individuals become a PHF when they obtain **1,000** recognition points.
- This can be done a few ways:
 - ❑ Contributing \$1,000 to an *eligible* fund.
 - ❑ Reaching 1,000 points through a combination of outright giving and points.
 - ❑ Naming an individual a PHF by transferring points to them.



Paul Harris Society (PHS)

- Contribute **\$1,000** or more each year to the Annual Fund, PolioPlus Fund, or approved global grants.
- Recognizes Rotarians who have the ability and desire to make substantial annual gifts to help communities around the world.
- PHS members give about 18% of all Annual Fund donations



What's \$1,000 per year?

- **\$250.00** per quarter
- **\$83.33** per month
- **\$19.20** per week
- **\$2.70** per day

Impact of our Rotary Foundation

Give the Gift of Rotary

A gift of \$1,000 per year can make lives better in your community and around the world.

\$15	-	Polio Vaccines
\$50	-	Water Filter
\$85	-	Business Classes
\$100	-	Covid-19 Training
\$150	-	Hand Washing Station
\$200	-	Medical Equipment
\$500	-	Anti-Bullying Campaign
\$1,000	-	Conflict Resolution Training
\$1,400	-	Power and Hand Tools

Foundation Recognition for Clubs

100% EREY Member Club Banner

Awarded to clubs that achieve a **\$100 per capita** and every dues paying member personally contributes **\$25 or more** to the Annual Fund or Disaster Response Fund during the Rotary year.



Based on membership as of June 30th

BUT

**Members who joined your club after July 1st
will not count in this computation.**

Foundation Recognition for Clubs

100% Foundation Giving Club Banner

Awarded to clubs that achieve a **\$100 per capita** and every dues paying member personally contributes **\$25 or more** to one or more of the following: Annual Fund, PolioPlus, Disaster Response Fund, Endowment Fund, or to an approved global grant during the Rotary year.



Based on membership as of June 30th

BUT

Members who join your club after July 1st will not count in this computation.

Foundation Recognition for Clubs

100% Sustaining Member Club Designation

Awarded to clubs in which every dues paying member personally contributes **\$100 or more** to the Annual Fund or Disaster Response Fund during the Rotary year.

No Rotary
Foundation
Banner

Based on membership as of June 30th

BUT

**Members who joined your club after July 1st
will not count in this computation.**

Foundation Recognition for Clubs

100% Sustaining Member Club Banner



District 5870 has its own banner which recognizes clubs that attain 100% Sustaining Member status.

Foundation Recognition for Clubs

100% Paul Harris Fellow Club Banner

Awarded to clubs in which every dues-paying member is a Paul Harris Fellow.

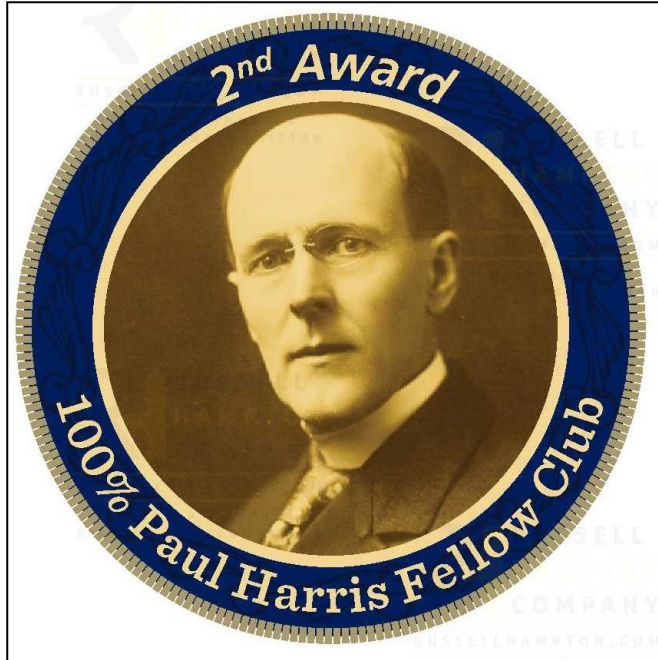


This banner is awarded only one-time to each eligible club.

The intent is that the club will work to keep their membership at 100% Paul Harris Fellows in future Rotary years.

Foundation Recognition for Clubs

Multiple-Award 100% Paul Harris Fellow Club Patch



Russell-Hampton has developed a sew-on patch for District 5870 that recognizes clubs that “regain” their 100% PHF Club status.

Foundation Recognition Points

- Any contribution to the Annual Fund, PolioPlus, the Disaster Response Fund or to an approved Global Grant gives the donor:
 - **Credit toward his/her own Paul Harris Fellow status**
PLUS
 - **Foundation Recognition Points**
- Points accumulate on a 1-for-1 basis
- Points only expire upon the death of the donor, or upon the death of the surviving spouse of a Major Donor

Foundation Recognition Points

- **Points can be transferred to any other person**
 - In amounts of 100 or more
 - To another Rotarian, a family member, a friend, a co-worker...absolutely anyone except yourself.
 - Cannot be transferred to your club or district, and they can only be transferred once.
- **Club contributions generate recognition points**
 - Undesignated contributions to the Annual Fund, Polio Plus, the Disaster Response Fund or toward an approved Global Grant project earn points, too.

WAYS TO GIVE

The
Rotary
Foundation



The
Rotary
Foundation



Ways to Give

- Automate your giving through **Rotary Direct**
- **Donate online** at my.rotary.org/donate
- Make a contribution at **Raise for Rotary**
- Give a check to your club Foundation chair
- Mail your gift directly to the Foundation
- Grow your impact with a **Corporate Matching Gift**
- Consider establishing a **pledge contract**
- Make a tax-free gift using your IRA's **RMD**

Rotary Direct

<https://my.rotary.org/rotary-direct>

- Select a cause, frequency and amount

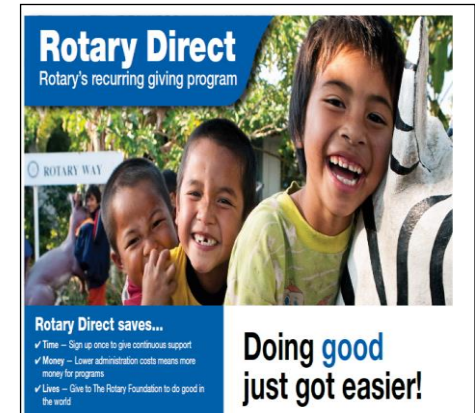
- **Three ways to enroll:**

Online, through the mail, and by phone (1-866-976-8279)

- Minimum contribution:

\$10 per transaction – i.e., \$10 per month, month, \$10 per quarter, or \$10 per year

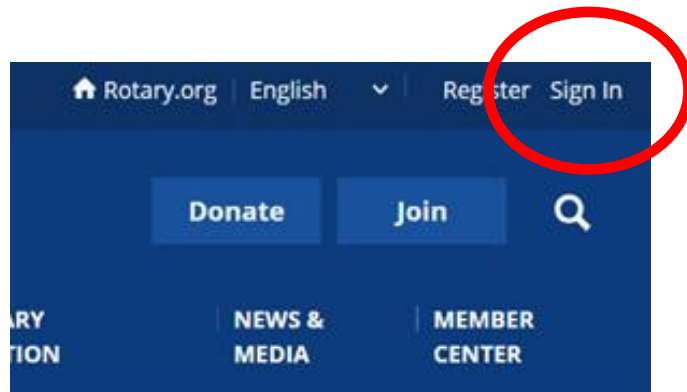
- Credit card only; direct debit is not an option
- Adjust or cancel anytime by signing into your My Rotary account.



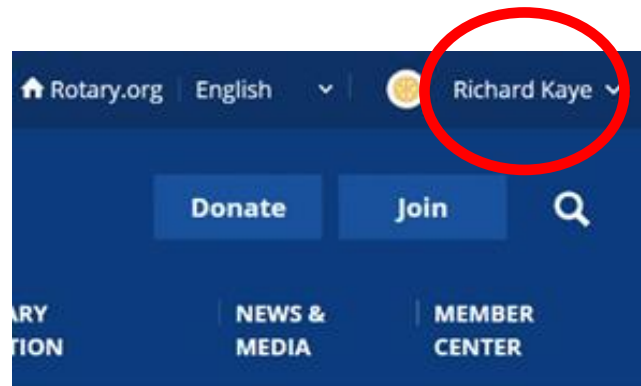
Donate Online via My Rotary

<https://my.rotary.org/donate>

- Easy, fast, secure
- Select a cause, frequency and amount
- Confirm you're signed in before you donate!



Not Signed In



Signed In

Facebook

Foundation Giving via Facebook

Jerry

Rich

George



The
Rotary
Foundation



If you give via
Facebook you will not
receive Foundation
recognition credit



Raise for Rotary

<https://raise.rotary.org>

I AM RAISING FOR
**PEACE-
BUILDING
& CONFLICT
PREVENTION**



Raise **for** Rotary

FUNDRAISE FOR THE ROTARY FOUNDATION

You can use this tool to fundraise for your favorite Foundation cause and share how you are Doing Good in the World with your social networks!

Start your fundraiser at **rotary.org/raise**.



Raise for Rotary

<https://raise.rotary.org>

- Create a personalized fundraiser to raise money for Rotary causes.
- Support the World Fund, Polio Fund, Disaster Response Fund, or Rotary's areas of focus.
- Share your fundraising page via social networks such as Twitter, Facebook, and Instagram.
- You'll receive Foundation credit and any applicable recognition but you must use your My Rotary email address.
- Clubs and Districts receive credit, too.



Corporate Matching Gifts

- Corporate matching gifts are donations from your employer, not you. They do not count as personal contributions.
- You will receive one Foundation Recognition Point for every dollar matched.
- Matching gifts are applied to the club, district, and fund of the employees choosing.
- This can be a little tricky to navigate so always feel free to contact us if you have questions

Pledge Contracts

- An instrument to facilitate major gifts
- The “pledge” is a commitment to contribute \$10,000 or more over a 3-year period to be paid in 3 equal annual installments
- Recognition given upon completion of the first year’s installment
- Donors designate the fund to which contributions are made
- Any contribution made to the designated fund counts toward the yearly installment

What Counts for What?

	<u>Every Rotarian, Every Year</u>	<u>Sustaining Member</u>	<u>Paul Harris Fellow</u>	<u>Paul Harris Society</u>	<u>Major Donor Recognition</u>	<u>Recognition Points</u>	<u>Benefactor</u>	<u>Bequest Society</u>	<u>Annual Fund Per Capita</u>	<u>TRF Giving Per Capita</u>	<u>DDF</u>
Annual Fund - SHARE	X	X	X	X	X	X			X	X	X
Annual Fund - AOF	X	X	X	X	X	X			X	X	
Disaster Response Fund	X	X	X	X	X	X			X	X	
PolioPlus Fund			X	X	X	X				X	
World Fund					X					X	
Endowment Fund					X		X	X		X	
Approved Global Grants			X	X	X	X				X	

FOUNDATION REPORTS

The
Rotary
Foundation




The
Rotary
Foundation



Foundation Reports

Where Do You Find Them?

- Sign into My Rotary
- Hover over **The Rotary Foundation** on the blue banner
- Select **Foundation Reports** from the drop down menu
- Scroll down the page to the **District Reports** section
- Under **Contributions & Recognitions**, click on the star icon  next to **Club Giving**
- Click on the **Add to my quick links** dialog box

Every time you log into My Rotary, the Foundation Reports that you need to manage your club will now be on the right side of the web page in the My Quick Links box.

Foundation Reports

Club Reports

Club Reports

- Club Recognition Summary (Individual)

Recognition Amount

PHF Level

Foundation Recognition Points

Date of Last Contribution

Last Fund Contributed To
Benefactor status

Rotary Direct

- Club Foundation Banner Report (Individual)

New Members

“Participation Rates”

Dates on which TRF Giving, EREY,
Sustaining Member, and PHS Eligible are achieved

- Club Fundraising Analysis (Club)

Five Year Trend Analysis



CLUB RECOGNITION SUMMARY

AS OF 19 JUNE 2020

Temple-South, TX, United States

100% Paul Harris Fellow Club 2013 - 2014

District:	5870	Paul Harris Fellows:	42	Bequest Society:	5	Rotarian Donors:	52	Rotary Direct Donors:	5	All-Time Giving:	\$382,729
Club:	21228	Benefactors:	14	Major Donors:	8	Rotarian Non-Donors:	3	Non-Rotarian Donors:	0		

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	— Last Contribution —	Benefactor	Rotary Direct
21228	Paul Harris Fellow Club 2013 - 2014					376.50	Feb-2020	AF-SHARE	
9317714		Y	504.40			504.40	May-2020	AF-SHARE	N
5179082		Y	3,114.40	PHF+2	Jan-2013	1,034.90	May-2020	AF-SHARE	N
776487		Y	5,450.40	PHF+4	Jun-1994	2,274.90	May-2020	AF-SHARE	N
8171079		Y	9,000.00 *	PHF+8	Dec-2011	3,934.50	May-2020	AF-SHARE	N
8594408		Y	7,285.00	PHF+6	Jan-2013	2,040.00	May-2020	AF-SHARE	N
8561778		Y	2,676.40	PHF+1	Oct-2013	1,509.40	May-2020	AF-SHARE	N
5727676		Y	5,382.40	PHF+4	Apr-2007	3,232.40	May-2020	AF-SHARE	N
3103980		Y	8,145.90	PHF+7	Dec-2005	4,775.90	May-2020	AF-SHARE	N
1796512		Y	9,000.00 *	PHF+8	Jan-1996	14,944.50	May-2020	AF-SHARE	Y
1081932		Y	50.00			50.00	May-2020	AF-SHARE	N
5654474		Y	4,895.90	PHF+3	Apr-2007	573.90	May-2020	AF-SHARE	N
2313600		Y	3,640.40	PHF+2	Oct-2013	2,009.90	May-2020	AF-SHARE	N
8348523		Y	2,548.90	PHF+1	Jan-2013	1,556.40	May-2020	AF-SHARE	N
1055638		Y	169.40			169.40	May-2020	AF-SHARE	N
776541		Y	4,086.40	PHF+3	Apr-2007	1,774.40	May-2020	AF-SHARE	N
8855891		Y	2,486.00	PHF+1	Jan-2017	1,146.00	May-2020	AF-SHARE	N
5638785		Y	6,062.40	PHF+5	Jun-2010	5,134.40	May-2020	AF-SHARE	N
1233167		Y	3,361.40	PHF+2	Jan-2013	1,918.40	May-2020	AF-SHARE	N
6269099		Y	9,000.00 *	PHF+8	Aug-2006	7,824.50	May-2020	AF-SHARE	N
6509495		Y	3,675.90	PHF+2	Aug-2012	1,173.90	May-2020	AF-SHARE	Y
1031250		Y	218.90			218.90	May-2020	AF-SHARE	N
1086155		Y							N
1087966		Y							N
1087617		Y							N
8171081		Y	8,647.90	PHF+7	Dec-2011	4,547.90	May-2020	AF-SHARE	Y

Personal data on this report should be used for authorized Rotary purposes only. By accessing this data, you agree to abide by [Rotary's Data Use Policy](#).



CLUB FOUNDATION BANNER REPORT

FOR ROTARY YEAR: 2019-20

Rotary Club of Temple-South, TX (21228), District 5870

All Active Rotarians:	55	TRF Giving Rotarians:	48	EREY Rotarians:	48	Sustaining Member Rotarians:	48	PHS Eligible Rotarians:	8	1 July Members	52
Existing Active Rotarians:	48	Percent TRF Giving:	100.0%	Percent EREY:	100.0%	Percent Sustaining Members:	100.0%	Percent PHS Eligible:	16.7%	Annual Fund Per Capita:	\$492.50
										Average TRF Giving:	\$659.81

Existing Active Rotarians are those with an admission date prior to 1 July. Beginning in 2015-16, only existing members are counted for EREY, TRF Giving, RFSM, or PHS participation.

Rotary ID	Rotarian Name	Club Member on 18-Jun-2020	TRF Giving Achieved	EREY Achieved	Sustaining Member Achieved	PHS Eligible Achieved	Paul Harris Society Member	Rotary Direct
9317714	Allen, Tad	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
5179082	Benner, William	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
776487	Berning, William (Bill) Bernard	Y	26-Oct-2019	26-Oct-2019	10-Mar-2020			
8171079	Bigbie, Justice M.	Y	12-Aug-2019	12-Aug-2019	12-Aug-2019		Y	
8594408	Bigbie, Tiziana	Y	12-Aug-2019	12-Aug-2019	12-Aug-2019			
8561778	Black, James	Y	26-Oct-2019	26-Oct-2019	24-Feb-2020			
5727676	Boley, Mike	Y	26-Oct-2019	26-Oct-2019	24-Feb-2020			
3103980	Bond, W. Kirk	Y	6-Aug-2019	6-Aug-2019	2-Aug-2019	2-Nov-2019		
1796512	Brockway, James M.	Y	21-Sep-2019	21-Sep-2019	21-Sep-2019	21-Sep-2019	Y	
10819328	Cary, Josias	New	10-Mar-2020	10-Mar-2020				
5654474	Coker, Neil	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
2313600	Cornelius, III, William M.	Y	26-Oct-2019	26-Oct-2019	24-Feb-2020			
8348523	Denman, Bryan	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
10556388	Dick, Matt	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
776541	Donahue, Michael	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
8855891	Eggleston, Kirk W	Y	26-Oct-2019	26-Oct-2019	21-May-2020			
5638785	Elliott, Edwin L.	Y	26-Oct-2019	26-Oct-2019	16-Jan-2020			
1233167	Flores, M. Louie	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
6269099	Gerik, Thomas	Y	23-Oct-2019	5-Nov-2019	16-Dec-2019	16-Dec-2019		
6509495	Glover, Nancy	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
10312501	Guillen, Patrick	Y	26-Oct-2019	26-Oct-2019	12-May-2020			
10861554	Gunter, John Mark	New						
10879664	Hawkins, Claudette	New						

Indicates members who joined after July 2nd

Personal data on this report should be used for authorized Rotary purposes only. By accessing this data,



Club Fundraising Analysis

Interim Results For July through June (2019 - 2020)

District 5870

Annual Fund Goal

2019 - 2020	\$20,000
2018 - 2019	\$25,000
2017 - 2018	\$15,000
2016 - 2017	\$25,300
2015 - 2016	\$28,000

Annual Fund Contributions

2019 - 2020	\$25,610
2018 - 2019	\$40,013
2017 - 2018	\$22,322
2016 - 2017	\$39,053
2015 - 2016	\$23,540



Annual Fund Report Range Comparison is the Annual Fund giving from 1 July to 30 June for current and previous years

The prior four-year average in Annual Fund giving from July through 30 June is \$31,232. This figure can be used to compare Annual Fund giving for the current Rotary year.

Total Contributions include Annual Fund, PolioPlus, approved Foundation Grants, Other Giving, and Endowment Fund (Permanent Fund) contributions for the reporting period.

For questions and additional club reports please use Member Access at www.rotary.org or call our Contact Center toll free at (+1-866-976-8279) or by email at contact.center@rotary.org.

Temple-South, TX

Total Contributions

2019 - 2020	\$34,310
2018 - 2019	\$43,243
2017 - 2018	\$25,258
2016 - 2017	\$43,053
2015 - 2016	\$26,130

AF Per Capita Club District

2019 - 2020	\$493	\$262
2018 - 2019	\$741	\$306
2017 - 2018	\$378	\$199
2016 - 2017	\$697	\$240
2015 - 2016	\$471	\$205

Membership

2019 - 2020	52
2018 - 2019	54
2017 - 2018	59
2016 - 2017	56
2015 - 2016	50

	EREY Members	Sustaining Members	PHS Eligible
2019 - 2020	56	52	10
2018 - 2019	60	53	7
2017 - 2018	67	53	7
2016 - 2017	63	59	7
2015 - 2016	61	50	7

Note: 'EREY Members' reflect the number of donors who contributed some amount to the Annual Fund during the Rotary Year. 'Sustaining Members' reflect the number of donors who contributed US\$100 or more to the Annual Fund. 'PHS Eligible' reflect the number of donors who contributed US\$1,000 or more to the Annual Fund, Polio Plus or approved Foundation Grant.

Foundation Reports

District Reports

District Reports

- Monthly Contribution Report (Club)

Number of Members

Annual Fund Goal

Annual Fund Per Capita Year-to-Date

Annual Fund Contribution Year-to-Date

- PolioPlus Report (Club)

Number of Members

PolioPlus Goal

PolioPlus Contribution Year-to-Date

Prior Year's Contribution



MONTHLY CONTRIBUTION REPORT

Interim Results For July through June (2019 - 2020)

(In US Dollars)

Club No	Name	Number of Members	Annual Fund Goal Amount	Goal % Achieved	AF Per Capita	-- Annual Fund --		-- Other Funds --		-- Endowment Fund --		-- Total --
						Month	YTD	Month	YTD	Month	YTD	
District: 5870												
1951	Marlin, TX, United States	16	\$2,000.00	28%	\$34.38	\$0.00	\$550.00	\$0.00	\$288.00	\$0.00	\$0.00	\$838.00
1952	McGregor, TX, United States	34	\$3,400.00	89%	\$88.53	\$10.00	\$3,010.00	\$0.00	(\$350.00)	\$0.00	\$0.00	\$2,660.00
1953	Mexia, TX, United States	23	\$3,600.00	91%	\$142.17	\$0.00	\$3,270.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,270.00
24685	Navarro County/ Corsicana, TX, United States	12	\$1,300.00	174%	\$188.04	\$0.00	\$2,256.50	\$0.00	\$0.00	\$0.00	\$0.00	\$2,256.50
1955	Northwest Austin, TX, United States	87	\$25,000.00	644%	\$1,851.26	\$689.00	\$161,060.04	\$119.00	\$121,449.00	\$0.00	\$0.00	\$282,509.04
31668	Pflugerville, TX, United States	61	\$8,500.00	255%	\$355.94	\$30.00	\$21,712.24	\$10.00	\$5,003.00	\$0.00	\$0.00	\$26,715.24
1957	Rockdale, TX, United States	24	\$2,800.00	216%	\$251.67	\$1,565.00	\$6,040.00	\$231.00	\$481.00	\$0.00	\$0.00	\$6,521.00
1958	Round Rock, TX, United States	61	\$4,500.00	116%	\$85.26	\$0.00	\$5,201.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,201.00
53857	Round Rock Sunrise, TX, United States	19	\$2,100.00	117%	\$128.95	\$0.00	\$2,450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,450.00
31136	Salado, TX, United States	13	\$1,700.00	6%	\$7.69	\$100.00	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00	\$200.00
1960	Shiner, TX, United States	23	\$3,000.00	70%	\$91.30	\$0.00	\$2,100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,100.00
1961	Somerville, TX, United States	10	\$600.00	67%	\$40.00	\$0.00	\$400.00	\$0.00	\$100.00	\$0.00	\$0.00	\$500.00
1962	South Austin, TX, United States	20	\$2,000.00	402%	\$402.35	\$20.00	\$8,047.00	\$75.00	\$475.00	\$0.00	\$0.00	\$8,522.00
1963	Taylor, TX, United States	24	\$2,300.00	105%	\$100.42	\$10.00	\$2,410.00	\$0.00	\$708.00	\$0.00	\$0.00	\$3,118.00
1965	Temple, TX, United States	93	\$35,000.00	58%	\$217.04	\$0.00	\$20,185.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,185.00
21228	Temple-South, TX, United States	52	\$20,000.00	128%	\$492.50	\$239.00	\$25,610.00	\$0.00	\$8,700.00	\$0.00	\$0.00	\$34,310.00
1966	Waco, TX, United States	223	\$22,000.00	81%	\$79.71	\$3,810.00	\$17,774.50	\$0.00	\$0.00	\$0.00	\$0.00	\$17,774.50
1938	Waco-Lake Brazos, TX, United States	38	\$2,000.00	19%	\$10.00	\$0.00	\$380.00	\$0.00	\$0.00	\$0.00	\$0.00	\$380.00
1944	Waco Sunrise, TX, United States	33	\$4,800.00	59%	\$86.09	\$100.00	\$2,841.00	\$100.00	\$220.00	\$0.00	\$0.00	\$3,061.00
1967	West Austin, TX, United States	19	\$3,800.00	150%	\$300.11	\$371.00	\$5,702.00	\$100.00	\$100.00	\$0.00	\$0.00	\$5,802.00



POLIO PLUS REPORT

JULY THROUGH JUNE (2019-20) - INTERIM RESULTS

Club No	Name	Number of Members	PolioPlus Club Goal Amount	PolioPlus Goal %	Prior Year PolioPlus Contribution	-- PolioPlus --		-- All Other Funds --		-- Total --
						Month	YTD	Month	YTD	
District: 5870										
1953	Mexia, TX, United States	23	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00	\$3,270.00	\$3,270.00
24685	Navarro County/Corsicana, TX, United States	12	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00	\$2,256.50	\$2,256.50
1955	Northwest Austin, TX, United States	87	\$0.00	0%	\$15,830.00	\$119.00	\$121,449.00	\$689.00	\$161,060.04	\$282,509.04
31668	Pflugerville, TX, United States	61	\$1,800.00	277.9%	\$2,194.00	\$10.00	\$5,003.00	\$30.00	\$21,712.24	\$26,715.24
1957	Rockdale, TX, United States	24	\$600.00	80.2%	\$2,627.50	\$231.00	\$481.00	\$1,565.00	\$6,040.00	\$6,521.00
53857	Round Rock Sunrise, TX, United States	19	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00	\$2,450.00	\$2,450.00
1958	Round Rock, TX, United States	61	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00	\$5,201.00	\$5,201.00
31136	Salado, TX, United States	13	\$0.00	0%	\$0.00	\$0.00	\$100.00	\$100.00	\$100.00	\$200.00
1960	Shiner, TX, United States	23	\$0.00	0%	\$300.00	\$0.00	\$0.00	\$0.00	\$2,100.00	\$2,100.00
1961	Somerville, TX, United States	10	\$300.00	33.3%	\$120.00	\$0.00	\$100.00	\$0.00	\$400.00	\$500.00
1962	South Austin, TX, United States	20	\$400.00	118.8%	\$767.00	\$75.00	\$475.00	\$20.00	\$8,047.00	\$8,522.00
1963	Taylor, TX, United States	24	\$500.00	141.6%	\$1,606.00	\$0.00	\$708.00	\$10.00	\$2,410.00	\$3,118.00
21228	Temple-South, TX, United States	52	\$2,500.00	348%	\$3,230.00	\$0.00	\$8,700.00	\$239.00	\$25,610.00	\$34,310.00
1965	Temple, TX, United States	93	\$0.00	0%	\$1,594.00	\$0.00	\$0.00	\$0.00	\$20,185.00	\$20,185.00
1938	Waco-Lake Brazos, TX, United States	38	\$0.00	0%	\$283.00	\$0.00	\$0.00	\$0.00	\$380.00	\$380.00
1944	Waco Sunrise, TX, United States	33	\$2,500.00	8.8%	\$640.00	\$100.00	\$220.00	\$100.00	\$2,841.00	\$3,061.00
1966	Waco, TX, United States	223	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$3,810.00	\$17,774.50	\$17,774.50
1967	West Austin, TX, United States	19	\$200.00	50%	\$300.00	\$100.00	\$100.00	\$371.00	\$5,702.00	\$5,802.00
1968	Yoakum, TX, United States	27	\$1,000.00	110%	\$2,500.00	\$0.00	\$1,100.00	\$0.00	\$6,798.18	\$7,898.18
Total for District: 5870		2,368	\$38,250.00	446.7%	\$69,201.54	\$5,202.00	\$170,863.83	\$22,287.58	\$645,080.74	\$815,944.57

WHAT YOU CAN DO TO HELP

The
Rotary
Foundation



The
Rotary
Foundation



What You Can Do To Help

- Set the example by becoming a Sustaining Member.
 - ✓ Contribute \$100 to the Annual Fund each year.
- Work to make Foundation giving an integral part of your club's culture.
 - ✓ Set an attainable, challenging Annual Fund goal that represents an increase in giving from the prior year.
 - ✓ Increase your “participation rate” – start with becoming a 100% EREY Club and work up.
 - ✓ Develop personal relationships.
 - ✓ Be patient ... the culture will not change overnight.

What You Can Do To Help

- Encourage your club to support the Every Rotarian, Every Year campaign.
 - ✓ Show your members why it makes sense to give.
- Make it easy for your members to contribute!
 - ✓ Automate giving via Rotary-Direct
 - ✓ On-line credit card contributions } Simple, Safe, Secure
 - ✓ Add voluntary contribution amounts to dues invoices
 - ✓ Invoice your members more frequently
 - ✓ Make regular “asks” throughout the year – don’t wait until December or June.

What You Can Do To Help

- Recognize your donors.
 - ✓ People liked to be thanked.
 - ✓ Do it publicly to help inspire others.
 - ✓ Consider holding an Annual Foundation Gala to spotlight your donors.
- Data mine ... look for ways to help your clubs.
 - ✓ Use the Foundation Reports
 - ✓ Determine who is close to their next recognition level, and which clubs are close to a recognition?

What You Can Do To Help

- Promote the Paul Harris Society
 - ✓ Make membership meaningful
- Identify a “Foundation Hero” in each club.
 - ✓ Sometimes the “official” chain of command can be the problem.
- Develop specific fundraising plans to generate funds for Annual Fund and PolioPlus
 - ✓ Don’t simply rely on individual contributions.
 - ✓ Consider designating a portion of a fundraiser to support Foundation programs.

What You Can Do To Help

- Leverage your Foundation Recognition Points!
 - ✓ As a match pool to promote Foundation giving
 - ✓ To reward member recruitment
 - ✓ To reward service
 - ✓ To become a 100% Paul Harris Fellow Club
- Schedule speakers who can help your members better understand the value of Rotary Foundation programs.
 - ✓ Show your members why it makes sense to give.

DISTRICT GIVING INCENTIVES

The
Rotary
Foundation



The
Rotary
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Jerry Johnson Trust Match Program



15 year member of RC of Killeen Heights

Bequeathed his estate to The Rotary Foundation

To assist active Rotarians in obtaining their first Paul Harris Fellowship, the Trust matches individual contributions to the Annual Fund on a one-for-one basis from \$100 to \$500.

Limited Time Offer Match

(August 1 through October 31)

For a number of years, the Jerry Johnson Trust has been asked if there is any way that the Trust can match contributions made by Rotarians who are already a Paul Harris Fellow.

The Limited Time Offer matches contributions made to the Annual Fund during Rotary Year 2021-22 on a one-to-one basis in amounts of 250 to 500 Foundation Recognition Points for any active Rotarian who is not yet a Paul Harris Fellow +8.

FOUNDATION GRANTS

The
Rotary
Foundation



The
Rotary
Foundation



RECAP: Changes Effective July 1, 2020

Changes effective July 1, 2020:

- The World Fund match of cash was eliminated and a minimum required World Fund match for global grants is no longer required.
- The International Partner required minimum contribution for global grants was reduced from 30% to 15%.
- The Simple School and Shelter Pilot ended without being adopted as a global grant program.
- Rotaract clubs became able to participate in District Grants.

What's Unchanged?

1. All Annual Fund-SHARE contributions are still being invested for three years and then split between DDF and the World Fund
2. Earnings from the investment of Annual Fund-SHARE funds will continue to pay many of the Foundation's operating expenses
3. A portion of investment earnings from the Endowment Fund, as designated by the trustees also helps pay operating expenses

Changes Effective July 1, 2021

50% Match on DDF Contributions to PolioPlus

(Down from 100%) (1 July 2021)



\$20,000

DDF Contribution

+



\$10,000

50% World Fund Match

+



\$60,000

Gates Foundation
Match

=

\$90,000

Polio
Eradication

Changes Effective July 1, 2021

80% Match on DDF Applied to Global Grants

(Down from 100%) (1 July 2021)



\$40,000
DDF applied to
Global Grant

+



\$32,000
80% World Fund
match

=

\$72,000
Global Grant funding

Changes Effective July 1, 2021

Shared Funding of Operating Expenses

(1 July 2024)

PREVIOUS

\$100 Annual Fund-SHARE Contribution



\$50 DDF ↑
\$45 World Fund ↑
\$5 Operating Expenses ↑

BEGINNING 1 JULY 2021

\$100 Annual Fund-SHARE Contribution



\$47.50 DDF ↑
\$47.50 World Fund ↑
\$5 Operating Expenses ↑

Changes Effective July 1, 2021

Five-Year Limit on DDF Rollover

(1 July 2026)

	2021-20	2022-23	2023-24	2024-25	2025-26
DDF new	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
DDF rollover	\$20,000	\$30,000	\$35,000	\$30,000	\$20,000
DDF Spent	(\$40,000)	(\$45,000)	(\$55,000)	(\$60,000)	(\$65,000)
Rollover Remaining	\$20,000	\$20,000	\$15,000	\$5,000	\$0
	\$10,000	\$10,000	\$10,000	\$10,000	\$0
		\$5,000	\$5,000	\$5,000	\$5,000
			\$0	\$0	\$0
				\$0	\$0
					\$0
Rollover Amount Remaining After	1 Year \$30,000	2 Years \$35,000	3 Years \$30,000	4 Years \$20,000	5 Years \$5,000

Additional Funding Changes

- Cost-saving measures
 - ✓ Enabled **\$4.4 million** to be transferred the World Fund for global grants
- Foundation operating reserves and the RI budget surplus
 - ✓ Enabled **\$15 million** to be transferred to the World Fund for global grants
- Elimination of the match on cash contributions (1 July 2020)
 - ✓ Expected to free up approximately **\$7 million** annually

Changes Effective July 1, 2021 and Beyond

Changes effective July 1, 2021 (continued):

- ***Supporting the Environment*** added as the 7th Area of Focus

Changes effective July 1, 2022:

- Rotaract clubs will be able to participate global grants.

Coming changes (undated):

- Contributors to the Disaster Response Fund will be able to designate their contribution to a specific disaster.

Covid-19 Grants

Covid-19 related changes:

- ❑ Disaster Response Grants: Covid-19 response activities are no longer eligible for funding
- ❑ Global Grants:
 - Must be submitted under the Disease Prevention & Treatment (PD&T) Area of Focus
 - Medical equipment/PPE only is OK
 - The international contribution requirement is waived
 - An International Partner is still required

Alternative Grant Financing

- The Rotary Foundation is encouraging grant sponsors to finance their Global Grants ***without a World Fund match***.
- Sponsors can use any combination of DDF, cash, directed gifts, or endowment earnings to make up the minimum \$30,000 budget that they need for their grant.
- Under the new policy, grant financing might look like this:

\$10,000 DDF + \$8,000 World Fund + \$12,000 cash contributions = \$30,000 global grant

Or

\$15,000 DDF + \$15,000 cash contributions = \$30,000 global grant (no World Fund match)

Changes to Terms & Conditions

- Section III:
 - **Forced labor:** Projects that require work without pay, or “sweat equity”, require the participant’s explicit consent.
 - **Child labor:** Projects that require work from someone below the country’s legal working age, or under age 16 if the law doesn’t specify, are prohibited.
- Section VI:
 - **Cash Match:** Effective 1 July 2020 the Rotary Foundation is no longer matching cash contributions for global grants
 - **Non-Rotarian cash:** May be added to a grant as long as it don’t come from a cooperating organization or anyone who benefits from the grant.
- Section VII:
 - **Required Minimum Contribution:** The International Partner required minimum contribution has been reduced from 30% to 15%

Best Practices for Submitting Global Grant Applications

- Request a preliminary review by your RGO before submission.
- Conduct a thorough community assessment and include the results in the grant application.
- Submit a signed MOU if partnering with a cooperating organization.
- Submit a sustainability component – how are going to ensure this project is still viable 5 years after it's completed – maintenance, training, spare parts, etc.
- Include bank account information before submitting the application.

Gift Policy Changes

- Corrections and Reclassification:

The time period for requesting a correction or reclassification of a contribution has been reduced from 90 days to 60 days (**effective April 1, 2021**)

- Pledge Contracts:

An “undesigned” pledge option has been established to permit making fund designations at the time a contribution is made instead of being fixed in the pledge contract.



ALWAYS log in to My Rotary 1st
BEFORE making a contribution

Use Multiple-Donor Form to submit
members contributions



Save Receipts – NOT Invoices
No Receipts → Club refunds
Grant funds





Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities and in ourselves.

A close-up photograph of a pair of hands, palms up, holding a small green plant with two leaves. The hands are positioned in the center of the frame, with the fingers slightly spread. The plant is held between the palms, with its stem and leaves clearly visible. The background is a soft, out-of-focus natural setting with green foliage and brown earth.

THE ROTARY FOUNDATION DOING GOOD IN THE WORLD