FOUNDATION PLANNING MEETING

Monday, August 30, 2021
AGENDA

- Meet the Team
- Training Schedule & Events
- Annual Fund
- End Polio Now
- Endowment Fund and Major Gifts
- Grants
- Q&A
MARK YOUR CALENDARS

Sat., Sep. 11  Foundation 101
            Grant Qualification
Sat., Sep. 25  Foundation 201
Sat. Oct. 9  Let’s End Polio . . . Now!
DID YOU KNOW POLIO COULD BE THE SECOND HUMAN DISEASE TO EVER BE ERADICATED?

WORLD POLIO DAY IS 24 OCTOBER endpolio.org | #endpolio
NOVEMBER IS

ROTARY FOUNDATION MONTH

“If we can conquer space, we can conquer childhood hunger.”

Buzz Aldrin

BECAUSE WE CARE
MAKE A CONTRIBUTION, BE THE DIFFERENCE
MARK YOUR CALENDARS

Sat., Sep. 11    Foundation 101
               Grant Qualification
Sat., Sep. 25    Foundation 201
Sat. Oct. 9     Let’s End Polio . . . Now!
Sun., Oct. 24   World Polio Day
Nov. 2021       Foundation Month
Sat., Feb. 5    Foundation Dinner (Oahu)
Annual Fund

Chair Dick May
ANNUAL FUND (YOUR TEAM)

- Annual Giving Chair: Dick May, Kapolei
  rmayhi02@hotmail.com
  (808) 375-2439 (talk or text)
- Major Donor Chair: Dick May
- Paul Harris Society Chair: Open
- White Hat Chair: Sally Blanchard
- Triple Crown Chair: Dave Mozdren
- Rotary Direct Chair: Open
ANNUAL FUND (OUR PLAN)

- Work with each club in a supportive role.
- Tailor options for your success.
- Support you and celebrate your success!
ANNUAL FUND (RESOURCES)

- We will provide as we go through the year. Recommend all Club Foundation Chairs be familiar with available tools on My Rotary.

- Rotary Direct: Go to My Rotary > Rotary Foundation > Give > Recurring Giving > Rotary Direct
ANNUAL FUND (TRAINING)

Recommend Foundation Chairs take two courses at My Rotary Learning Center. From the Learning Course Catalog, select:

- Club Rotary Foundation Basics
- Also consider Fundraising Basics
Foundation Giving Incentive Program

- **Top 10 Clubs**
- **Duration:** July 1, 2021, through April 30, 2022
- **Purpose:** Incentivize clubs to increase membership in EREY, increase annual giving, increase Polio-Plus Society membership, gain new Paul Harris Fellows.
FOUNDATION GIVING INCENTIVE PROGRAM

Criteria include:
- Percentage of members enrolled in EREY
- Per capita giving increase in incentive period
- Number of new Paul Harris Fellows
- Number of new Polio-Plus Society members
- Total per capita giving amount
FOUNDATION GIVING INCENTIVE PROGRAM

- Club Recognition
- Crisp new $100 bill (to add to Club’s RI Foundation annual contribution)
PolioPlus
Chair Roz Cooper
- Vaccines with which to immunize children

- Supporting the delivery system to get the vaccines to children.

- Raising awareness in communities about the importance of vaccination and opportunities to get vaccinated

- The surveillance system that is critical to detecting virus

- Technical experts in the polio-affected and high risk countries to guide polio eradication efforts
5 Reasons We Must Eradicate Polio ..... Now!

1. Your Gift will Improve Lives.

2. Your Gift Will Invest in the Future

3. Your Gift Will Improve Child Health


5. Your Gift will Make History
Let’s kick polio out of Afghanistan and Pakistan and ....
Endowment Fund/Major Gifts
Chair Win Schoneman
ENDOWMENT FUND/MAJOR GIFTS

Once upon a time
### Endowment Fund/Major Gifts

#### Gift Types

<table>
<thead>
<tr>
<th><strong>Outright Gifts</strong></th>
<th><strong>Endowed Gifts</strong></th>
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</thead>
<tbody>
<tr>
<td>• Cash</td>
<td>• Bequest through a will or trust</td>
</tr>
<tr>
<td>• Publicly traded securities</td>
<td>• Life insurance or assurance plans</td>
</tr>
<tr>
<td>• Real estate</td>
<td>• Retirement plans</td>
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ENDOWMENT FUND/MAJOR GIFTS

2021-2022 IMPACT GRANT

ENDOWMENT FUND RESOURCES ARE AVAILABLE IN THE CHAT BOX
Foundation
Grants
Chair Mark Harbison
FOUNDATION GRANTS (YOUR TEAM)

- District Grants Subcommittee Chair: Mark Harbison
  markaharbison@gmail.com
  +1(808) 283-3785 (talk or text)

- District Grants Chair: Dave Hamil

- Global Grants Co-Chair: James Ham

- Global Grants Co-Chair: Arjun Aryal

- Global Grant New Initiatives: Mariko Higashi

- Global Grants: New Initiatives (Intercountry Committees): Aryuna Radnaeva
Together, we funded more than 2,000 global grants that empowered Rotary members around the world to take on projects they care about and make a difference in their communities. Your generosity helped us raise more than $440 million! Unbelievable! Highest ever!
FOUNDATION GRANTS

- **New** Global Grants and **New** Funding Model and more up on RotaryD5000.org Foundation website

- District Application Submitted with 95 New Community Service Projects

- New Foundation Grants Goal: $1 Million in new Global Grants

- New Global Grants Goal: Engage with Sister District(s), Sister Clubs to Double DDF and Cash for Global Grants

Recommend Foundation Chairs explore the Foundation website on RotaryD5000.org and take two courses at My Rotary Learning Center.

From the Learning Course Catalog, select:

- Grant Management Seminar
- Rotary’s Areas of Focus
How can we help you?

Rotary
District 5000