

# FOUNDATION PLANNING MEETING

Monday, August 30, 2021



District Rotary  
Foundation Committee



# AGENDA

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

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# MEET THE TEAM



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

Rotary 

**END  
POLIO  
NOW**



NOVEMBER IS

# ROTARY FOUNDATION MONTH

*"If we can conquer space, we can conquer childhood hunger."*

Buzz Aldrin



EVERY  
■ ROTARIAN  
■ EVERY  
■ YEAR

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)

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# Annual Fund

Chair Dick May



## ANNUAL FUND (YOUR TEAM)

- Annual Giving Chair: Dick May, Kapolei  
[rmayhi02@hotmail.com](mailto: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

## 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)



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# PolioPlus

## Chair Roz Cooper



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- ❑ *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*
- 4. Your Gift Will Lower Health Care Costs.*
- 5. Your Gift will Make History*





**WORLD POLIO DAY**  
**IS 24 OCTOBER** [endpolio.org](http://endpolio.org) | [#endpolio](https://twitter.com/endpolio)



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*Let's kick polio out of Afghanistan  
and Pakistan and....*



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# Endowment Fund/Major Gifts

Chair Win Schoneman

# ENDOWMENT FUND/MAJOR GIFTS

Once upon a time

# ENDOWMENT FUND/MAJOR GIFTS

## GIFT TYPES

### OUTRIGHT GIFTS

- Cash
- Publicly traded securities
- Real estate

### ENDOWED GIFTS

- Bequest through a will or trust
- Life insurance or assurance plans
- Retirement plans



## ENDOWMENT FUND/MAJOR GIFTS



## 2021-2022 IMPACT GRANT

ENDOWMENT FUND RESOURCES ARE AVAILABLE IN THE CHAT BOX





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# Foundation Grants

Chair Mark Harbison

## FOUNDATION GRANTS (YOUR TEAM)

- District Grants Subcommittee Chair: Mark Harbison  
[markaharbison@gmail.com](mailto: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

# FOUNDATION GRANTS

- **K.R. (Ravi) Ravindran**
- **@KRRavindran105**
- 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
- Global Grants New Initiatives: Engage with Strategic Partners, Peace Fellows, Returning Peace Corp Volunteers, Rotary Action Group and Fellowships, Intercountry Committees

## FOUNDATION GRANTS (TRAINING)

Recommend Foundation Chairs explore the Foundation website on [RotaryD5000.org](http://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



**Rotary**  
District 5000

