TOGETHER WE ARE ROTARY

Rotary International  
501(c)(4) – Board of Directors

**Revenue Sources:**
- Dues
- Investment Income
- Services & Other Activities

**Expenses:**
- Related to Dues
- Related to Services & Activities

The Rotary Foundation  
501(c)(3) – Board of Trustees

**Revenue Sources:**
- Contributions
- Investment Income

**Expenses:**
- Program Awards & Operations
- Fund Development Administration
FUNDRAISING - GIVING - CONTRIBUTING - DONATING

- **EREY** – SUPPORT THE ANNUAL FUND - minimum $25
- **SUSTAINING MEMBER** – Contribute $100 or more to the Annual Fund
- **PHS – PAUL HARRIS SOCIETY** – contribute at least $1,000 to AF, Polio Plus or Approved Global Grant
- **MAJOR DONOR** – Individual/couples combined giving reaches $10,000
- **MAJOR GIFT** – Outright gifts of more than $10,000
- **BENEFACTOR** – Inform TRF in writing making provision in estate plans for TRF or outright gift of $1,000 or more to Endowment Fund
- **BEQUEST SOCIETY** – Individual/couples commitment in estate plans of $10,000 or more
- **POLIO** – Contributions to Polio Plus
PROGRAMS
PROGRAMS-GETTING-SPENDING

- GLOBAL GRANTS
- DISTRICT GRANTS
  - GRANTS TRAINING AND MOU
  - PROJECT DEVELOPMENT
    - International – PDG Holly Axtell
    - Community – Stephanie Schmautz and Jenny Bates
- STEWARDSHIP
- PEACE FELLOWS
- GLOBAL SCHOLARS
STRENGTHEN ROTARIAN KNOWLEDGE AND ENGAGEMENT

FINANCIAL SUPPORT OF THE ROTARY FOUNDATION (TRF)

TELL THE STORY
Contributions to TRF

- Contribution forms
  - 123
  - 102
TRF Resources

• TRF Resource Guide
  • https://www.dropbox.com/sh/xskjb2svwh1g6ud/AACitkUDgmlZE2bGIcfAdMYTa/Guides%2C%20Manuals%20%26%20Reports/TRF%20Resource%20Guide%20%28Zones%2025%20%26%2026%29/ TRF%20Resource%20Guide%20for%20Zones%2025%20%26%2026.pdf?dl=0
OUR FOCUS

Peace and Conflict Prevention/Resolution
Disease Prevention and Treatment
Water and Sanitation
Maternal and Child Health
Basic Education and Literacy
Economic and Community Development
EVERY ROTARIAN, EVERY YEAR

100% Member Participation
HOW PROGRAMS ARE FUNDED

50%
District Designated Fund (DDF)

50%
World Fund
EVERY ROTARIAN, EVERY YEAR
EVERY ROTARIAN, EVERY YEAR

Every year, hundreds of thousands of people benefit from locally driven projects funded by The Rotary Foundation. When you give to Rotary, you enable leaders like you to create sustainable solutions to their community’s most pressing needs.

By making a gift of any size, you can be part of this positive change.

www.rotary.org/givethegift
EVERY ROTARIAN, EVERY YEAR

District 5150 Every Rotarian Every Year Campaign

Great Prizes for a Great Cause!

Drawing: Rotary – Our Legacy, Our Future Event
October 8 – Hilton at SF Airport Bayfront

Donate online or make checks payable to The Rotary Foundation
Need not be present to win
EVERY ROTARIAN, EVERY YEAR

- **PRIZES - VISA GIFT CARDS**
  - 20 VISA GIFT CARDS = $6,300
  - $2,000 GRAND PRIZE

- **CFC SENDS DONATIONS AND FORMS DIRECTLY TO TRF**
EVERY ROTARIAN, EVERY YEAR

➢ ANNUAL FUND – SHARE

➢ PRIZES - VISA GIFT CARDS
  ✓ 20 VISA GIFT CARDS = $6,300
  ✓ $2,000 GRAND PRIZE

➢ DONATIONS AND FORMS SENT DIRECTLY TO TRF BY CFC
EVERY ROTARIAN, EVERY YEAR

- TICKETS AND INVENTORY SHEET SENT TO GENE DUFFY
- DEADLINE OCTOBER 5, 2016
- 50% OF ANNUAL FUND DONATIONS THIS YEAR COMES BACK TO OUR DISTRICT IN 3 YEARS!
MAKE ROTARY YOUR CHARITY OF CHOICE!

Needs identified and implemented by Rotarians

- Global network of compassionate volunteers
- Rotarian driven
- Local and international activities
- Diligent oversight of funds
TRF REPORTS

- VALUABLE TOOLS – REVIEW OFTEN
- TRACK PROGRESS TOWARD GOALS
- IDENTIFY MEMBERS WHO HAVEN’T GIVEN LATELY
- IDENTIFY MEMBERS WHO ARE CLOSE TO BECOMING A PAUL HARRIS FELLOW
- TRACK DONATIONS TO TRF BY MEMBER
# CLUB RECOGNITION SUMMARY

The Rotary Foundation - Club Recognition Summary
as of January 14, 2015

**Somewhere, IL, United States**

<table>
<thead>
<tr>
<th>District ID</th>
<th>Paul Harris Fellows</th>
<th>Club ID</th>
<th>Benefactors</th>
<th>Bequest Society</th>
<th>Rotarian Donors</th>
<th>Rotary Direct Donors</th>
<th>All-Time Giving</th>
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<tbody>
<tr>
<td>9999</td>
<td>26</td>
<td>99999</td>
<td>4</td>
<td></td>
<td>34</td>
<td>6</td>
<td>$123,539.01</td>
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**Club Recognition Amount**

<table>
<thead>
<tr>
<th>Rotary ID</th>
<th>NAME</th>
<th>Club Member</th>
<th>Recognition Amount</th>
<th>Current PHF Level</th>
<th>PHF Date</th>
<th>Foundation Recognition Pts Available</th>
<th>-- Last Contribution --</th>
<th>Benefactor</th>
<th>Rotary Direct</th>
</tr>
</thead>
<tbody>
<tr>
<td>99999</td>
<td>RIC of Somewhere</td>
<td>Y</td>
<td>1,055.00</td>
<td>PHF</td>
<td>Dec-2014</td>
<td>3,099.75</td>
<td>Dec-2014 POLIO PLUS</td>
<td>N</td>
<td>Y</td>
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<tr>
<td>1234567</td>
<td>Adams, John</td>
<td>Y</td>
<td>160.00</td>
<td>PHF</td>
<td>May-2009</td>
<td>160.00</td>
<td>Nov-2014 AF-SHARE</td>
<td>Y</td>
<td></td>
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<tr>
<td>7664321</td>
<td>Anderson, Jane</td>
<td>Y</td>
<td>2,425.00</td>
<td>PHF+1</td>
<td>Nov-2007</td>
<td>912.50</td>
<td>Nov-2014 AF-SHARE</td>
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**Note:** As of 2015-16 Rotary year, new club members will not be included in the participation requirements for club banners (excluding the 100% PHF Banner). This includes Rotarians who joined Rotary or transferred from another club during the current Rotary year. However their contributions will be used for per capita calculations.
TRF REPORTS

Sections
A. Indicates 100% Paul Harris Fellow Club and the date this was achieved.
B. District and club number appear on the top left
C. Number of club’s Paul Harris Fellows and Benefactors
D. Number of Bequest Society Members and Major Donors
E. Number of Rotarian Donors and Rotarian Non-Donors
F. Number of Rotary Direct Donors and Non-Rotarian Donors
G. Total historical contributions to The Rotary Foundation credited to the club. Includes all contribution types (Annual Fund, Endowment Fund and Other Giving (which includes PolioPlus Fund and grants)
H. Identifying information by individual, including member ID (+ indicates deceased member), name, and membership status (Y = active member; N = former/deceased member or non-Rotarian with a contribution history; H = honorary member)
I. Recognition amount reflects the total Paul Harris Fellow recognition you have accumulated through your personal contributions plus all recognition points you’ve been given by other individuals, clubs, or districts. Recognition points given to you don’t count toward Major Donor recognition. The maximum amount that can be shown on the Club Recognition Summary report is 9,000; the “+” sign indicates that the actual amount exceeds the 9,000-point maximum.
J. Paul Harris Fellow/Multiple PHF status, and month and year first PHF recognition was achieved
K. Foundation Recognition Pts Available reflect points you have accumulated through personal outright giving to the Foundation. All points listed can be transferred to other individuals for Paul Harris Fellow recognition
L. Foundation recognition points available, which can be transferred to other individuals to help them achieve their first or multiple PHF recognition. Points accumulate 1:1 for every dollar contributed
*Learn about Foundation recognition points on page 9.
M. Month & year along with the designation (program fund) of most recent contribution
N. Indicates Benefactor status. A Benefactor is anyone who informs The Rotary Foundation in writing that s/he has made provisions in their will, or other estate plan, naming the Endowment Fund as a beneficiary; or anyone who makes an outright gift of $1,000 or more to the Endowment Fund.
O. Rotary Direct status indicated (Y= Rotary Direct participant)
District 5150

Annual Fund Goal

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
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<tbody>
<tr>
<td>2016-2017</td>
<td>$9,000</td>
</tr>
<tr>
<td>2015-2016</td>
<td>$8,300</td>
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<td>2014-2015</td>
<td>$6,380</td>
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<tr>
<td>2013-2014</td>
<td>$6,980</td>
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<tr>
<td>2012-2013</td>
<td>$3,520</td>
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Annual Fund Contributions

<table>
<thead>
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<th>Year</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
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<td>$350</td>
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<tr>
<td>2015-2016</td>
<td>$14,285</td>
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<tr>
<td>2014-2015</td>
<td>$22,795</td>
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<td>2013-2014</td>
<td>$11,861</td>
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<tr>
<td>2012-2013</td>
<td>$21,640</td>
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</table>

Marin Evening, CA

Total Contributions

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<thead>
<tr>
<th>Year</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>2016-2017</td>
<td>$350</td>
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<tr>
<td>2015-2016</td>
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<td>2013-2014</td>
<td>$27,995</td>
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<tr>
<td>2012-2013</td>
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</table>

AF Per Capita

<table>
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<tr>
<th>Year</th>
<th>Amount</th>
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<tbody>
<tr>
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<td>2013-2014</td>
<td>$474</td>
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<tr>
<td>2012-2013</td>
<td>$941</td>
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Membership

<table>
<thead>
<tr>
<th>Year</th>
<th>EREY Members</th>
<th>Sustaining Members</th>
<th>PHS Eligible</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-2017</td>
<td>3</td>
<td>1</td>
<td>0</td>
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<tr>
<td>2015-2016</td>
<td>23</td>
<td>17</td>
<td>6</td>
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<tr>
<td>2014-2015</td>
<td>36</td>
<td>24</td>
<td>8</td>
</tr>
<tr>
<td>2013-2014</td>
<td>28</td>
<td>15</td>
<td>5</td>
</tr>
<tr>
<td>2012-2013</td>
<td>28</td>
<td>14</td>
<td>5</td>
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</tbody>
</table>

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.

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).
THE TOP TEN
FOR
CLUB PRESIDENTS
AND CLUB TRF CHAIRS
BE YOUR CLUB’S CHEERLEADER – SPREAD ENTHUSIASM

LEAD BY EXAMPLE – SHARE YOUR ROTARY STORIES; DONATE TO TRF

REVIEW THE MONTHLY CLUB RECOGNITION SUMMARY

IDENTIFY CLUB MEMBERS WHO DIDN’T CONTRIBUTE LAST YEAR AND EARLIER; TALK WITH THEM PRIVATELY ABOUT DONATING

CELEBRATE TRF DONATIONS: PAUL HARRIS FELLOWS; MAJOR DONORS; ASK LEADERSHIP ASSIST IN PRESENTATIONS

THANK EVERY ROTARIAN WHO CONTRIBUTES
THE ROTARY FOUNDATION

- Use Recognition Points to recognize extraordinary work
- Incentive – Two for one match
- Encourage Rotary Direct - eliminates paperwork and makes it simple
- Understand the grants process
- Understand the paper work and how to get issues resolved
- Share Polio Plus information and TRF significant activities at club meetings – “TRF thought for the day”
- Show TRF videos at club meetings – only 2 to 3 minutes each
THE ROTARY FOUNDATION

August 6, 2016
ROTARIANS ACCOMPLISH EXTRAORDINARY THINGS

YOU ARE THE MISSING PIECE.

The Rotary Foundation
OUR ROTARY FOUNDATION

More than $3.5 Billion

Humanitarian and Educational Grants since 1947
To enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education, and the alleviation of poverty.
TRF Areas of Focus

- Peace and Conflict Resolution
- Disease Prevention and Treatment
- Maternal and Child Health
- Water and Sanitation
- Basic Education and Literacy
- Economic and Community Development
CONTRIBUTIONS

Annual Programs Fund                        $117 million
Permanent Fund                              $ 24 million
PolioPlus                                   $ 35 million
Gates Polio Donation                        $ 70 million

Total Contributions:  $246 million
PolioPlus:
Keep our Promise to Eradicate Polio
Polio – The Disease
Symptoms

Neurologic involvement

Nonparalytic - 1-2%

Paralytic < 0.1-0.5%

Spinal ~ 79%

Bulbospinal ~ 19%

Bulbar ~ 2%
END POLIO NOW CAMPAIGN

- 1985 POLIO PLUS CAMPAIGN LAUNCHED
- 2007 GATES FOUNDATION GAVE TRF A $100 MILLION CHALLENGE GRANT FOR POLIO ERADICATION
- 2009 GATES INCREASED INITIAL GRANT TO $355 MILLION
- 2013 GATES MATCH CHALLENGE: TWO-FOR ONE, UP TO $35 MILLION PER YEAR THROUGH 2018
- ROTARY HAS RAISED **1.5 BILLION DOLLARS** FOR POLIO
- POLIO ERADICATION FOR 2016-2018 = $3.5 BILLION
Progress in Polio Eradication

1985
INDIA: NO Wild Polio Virus - more than 6 years!
AFRICA: NO " Polio Virus for 24 months!

World Wild Polio cases in 2015: 74
vs 359 in 2014

AS OF AUGUST 4, 2016= 19
◆ 2+ Billion children immunized
◆ 10-Million cases have been prevented
◆ 1.5-Million deaths averted
◆ $11-Billion raised overall
◆ $1.5+ Billion donated by Rotarians
We are “THIS CLOSE” to Eradicating Polio Around The Globe!
Transmission in endemic countries jeopardizes polio-free countries. Up to 200,000 children paralyzed annually within 10 years. $11B global investment. Transmission in endemic countries jeopardizes polio-free countries.
END POLIO NOW
Support Our Rotary Foundation

Help Us Give Today!
WAYS TO SUPPORT TRF

ROTARY DIRECT
Rotary’s recurring giving program

ROTARY DIRECT SAVES...
✓ Time — Sign up once to give continuous support
✓ Money — Lower administration costs means more money for programs
✓ Lives — Give to The Rotary Foundation to do good in the world

EFFICIENT.
Contributions go directly to The Rotary Foundation, resulting in faster processing and achievement of your club and personal charitable goals.

CONVENIENT.
Minimize work for you and your club’s leadership by setting your own schedule of contributions that count toward Paul Harris Fellow, Paul Harris Society, and Major Donor recognition, as well as your club recognition banners.

SECURE.
It’s the safest and most secure way to contribute to The Rotary Foundation.

DOING GOOD JUST GOT EASIER!

Enroll Online: www.rotary.org/give

Mail: Rotary Direct FD420
Rotary International
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA

Fax: 1-847-328-5260
Phone: 1-866-976-8279

Please call to modify your existing Rotary Direct contributions.
THE ROTARY FOUNDATION
DISTRICT 5150 RESOURCES

PDG RIKI INTNER- TRF Committee Chair 2016-2019
johnbdg1112@gmail.com - 707-486-8484

GENE DUFFY - Major Donor, Annual Fund & Bequest Society Chair
uback@msn.com - 415-747-4227

DGN JAYNE HULBERT - Major Donor, Annual Fund & Bequest Society Chair
jaynehulbert@comcast.net - 415-300-7636

PDG RUSS KETRON – Polio Plus Chair
russketron@gmail.com - 415-892-0928
THE ROTARY FOUNDATION CENTENNIAL

❖ CELEBRATE Sponsor a Rotary Day event focused on TRF

❖ INFORM Club members and community about TRF record of improving life in communities worldwide

❖ IMPROVE your community – sponsor a TRF centennial event and invite public to participate
RAISE MONEY for PolioPlus, the Rotary Peace Centers, or your Club’s global grant projects with fun events in your community.

VISIT rotary.org/foundation100 for additional resources.

#TRF100
THANK YOU!