

THE ROTARY FOUNDATION

Rotary



THE ROTARY FOUNDATION



August 6, 2016

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*

Rotary



THE ROTARY FOUNDATION FUNDRAISING

Rotary



THE ROTARY FOUNDATION



August 6, 2016

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

Rotary



THE ROTARY FOUNDATION



August 6, 2016

PROGRAMS-GETTING-SPENDING

❖ GLOBAL GRANTS

❖ DISTRICT GRANTS

➤ GRANTS TRAINING AND MOU

➤ PROJECT DEVELOPMENT

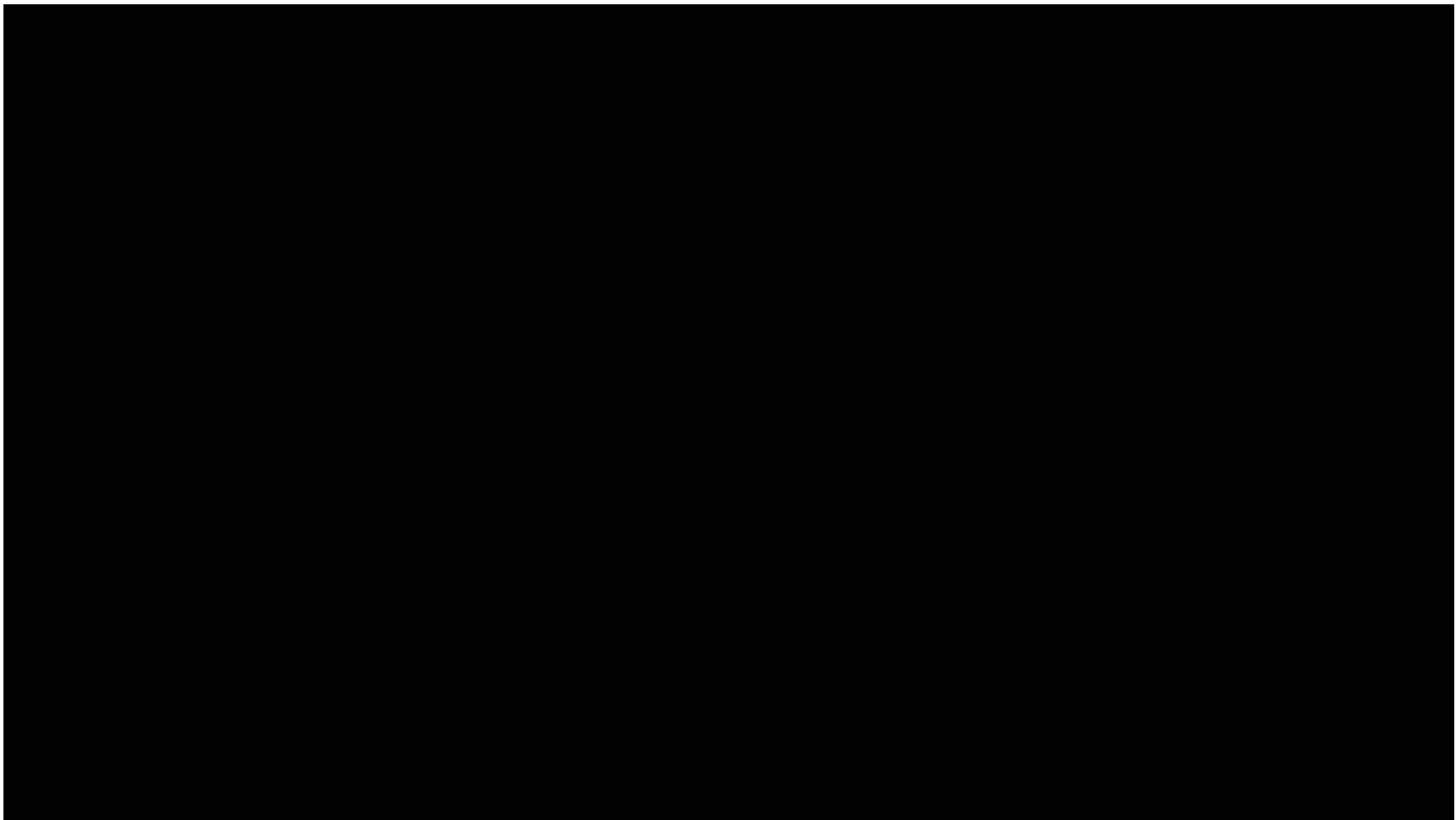
- International – PDG Holly Axtell
- Community – Stephanie Schmautz and Jenny Bates

❖ STEWARDSHIP

❖ PEACE FELLOWS

❖ GLOBAL SCHOLARS





CLUB FOUNDATION CHAIR - CFC

- ❖ **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>



THE ROTARY FOUNDATION

Rotary



THE ROTARY FOUNDATION



August 6, 2016

THE ROTARY FOUNDATION EVERY ROTARIAN, EVERY YEAR

Rotary



THE ROTARY FOUNDATION



August 6, 2016

OUR MISSION



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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

Rotary



EVERY ROTARIAN, EVERY YEAR



100% Member Participation

Rotary



HOW PROGRAMS ARE FUNDED



50%

District Designated Fund (DDF)



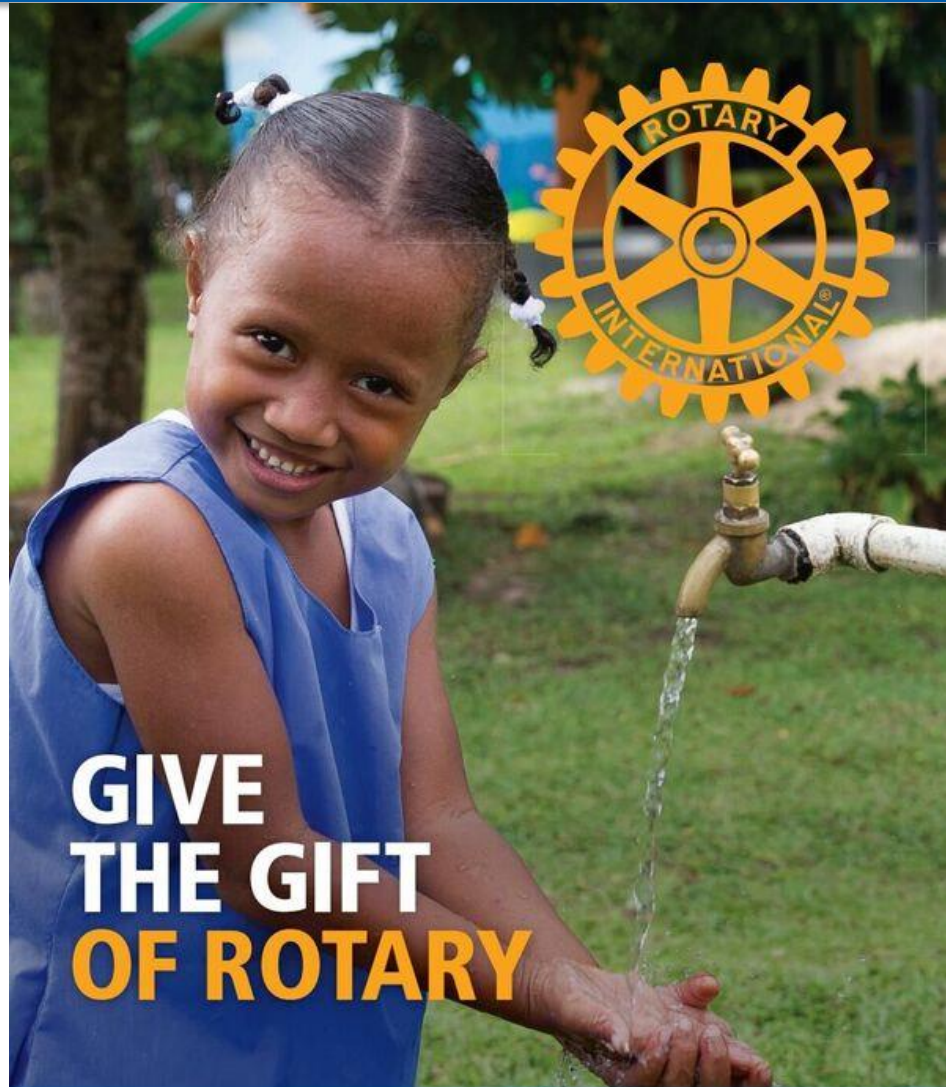
50%

World Fund

Rotary



EVERY ROTARIAN, EVERY YEAR



**GIVE
THE GIFT
OF ROTARY**



TAKE ACTION:
www.rotary.org/givethegift

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.

Take
Action:
Give
Now

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

www.rotary.org/givethegift

\$10
MOSQUITO BED NET

Fighting Disease



\$25
SCHOOL UNIFORM

Supporting Education



\$50
WATER FILTER

Providing Clean Water



\$100
SEWING MACHINE

Growing Local Economies



\$200
MEDICAL EQUIPMENT

Saving Mothers and Children



\$1,000
CONFLICT RESOLUTION TRAINING

Promoting Peace



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**

Rotary



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**

Rotary



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 !**

Rotary



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



THE ROTARY FOUNDATION

Rotary



THE ROTARY FOUNDATION



August 6, 2016

THE ROTARY FOUNDATION REPORTS

Rotary



THE ROTARY FOUNDATION



August 6, 2016

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**

TRF REPORTS

Rotary



Rotary



TRF REPORTS

CLUB RECOGNITION SUMMARY



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

Somewhere, IL, United States

A 100% Paul Harris Fellow Club 2013-2014

District ID: 9999	Paul Harris Fellows: 26	Bequest Society: 4	Rotarian Donors: 34	Rotary Direct Donors: 6	All-Time Giving: \$123,539.01
Club ID: 99999	Benefactors: 4	Major Donors: 1	Rotarian Non-Donors: 0	Non-Rotarian Donors: 0	
B	C	D	E	F	G

Rotary ID	N A M E	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor	Rotary Direct
99999	R/C of Somewhere					3,099.75	Dec-2014 POLIO PLUS		
1234567	Adams, John	Y	1,055.00	PHF	Dec-2014	705.00	Jan-2015 AF-SHARE	N	Y
7654321	Anderson, Jane	Y	160.00	PHF	May-2009	160.00	Nov-2014 AF-SHARE	Y	
1357975	Bakers, Bob	Y	2,425.00	PHF+1	Nov-2007	912.50	Nov-2014 AF-SHARE	N	
H			I		J	K	L	M	N

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)



Club Fundraising Analysis

Interim Results For July through July (2016 - 2017)

Marin Evening, CA

District 5150

Annual Fund Goal

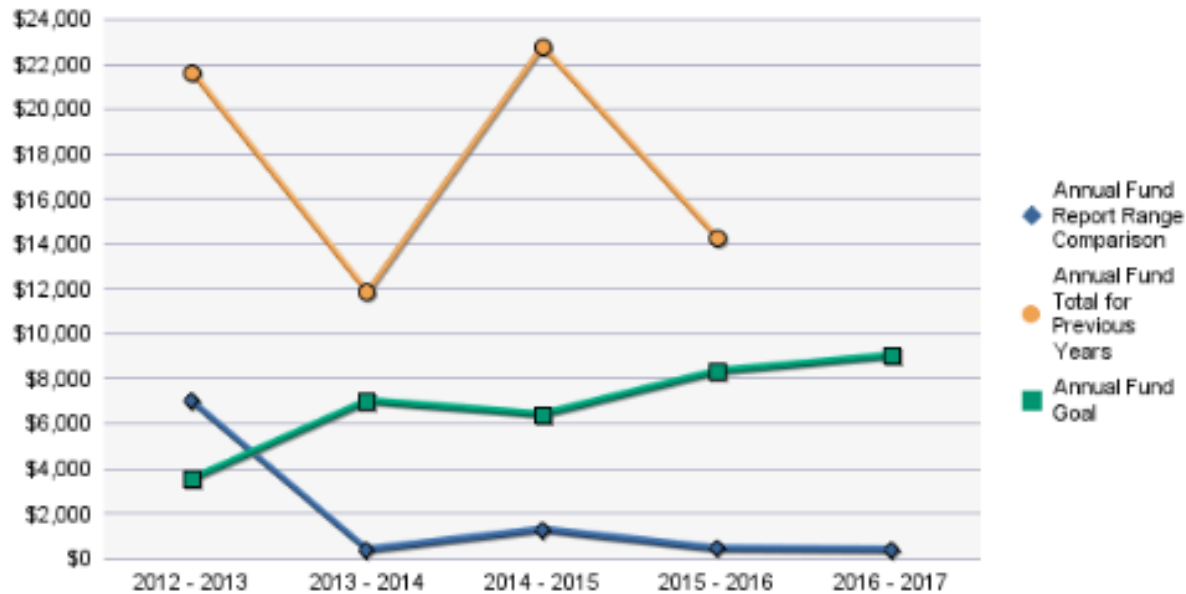
2016 - 2017	\$9,000
2015 - 2016	\$8,300
2014 - 2015	\$6,380
2013 - 2014	\$6,980
2012 - 2013	\$3,520

Annual Fund Contributions

2016 - 2017	\$350
2015 - 2016	\$14,285
2014 - 2015	\$22,795
2013 - 2014	\$11,881
2012 - 2013	\$21,640

Total Contributions

2016 - 2017	\$350
2015 - 2016	\$22,960
2014 - 2015	\$31,720
2013 - 2014	\$27,995
2012 - 2013	\$30,495



AF Per Capita	Club	District
2016 - 2017	\$0	\$0
2015 - 2016	\$649	\$178
2014 - 2015	\$950	\$195
2013 - 2014	\$474	\$188
2012 - 2013	\$941	\$178

Membership		
2016 - 2017	0	
2015 - 2016	22	
2014 - 2015	24	
2013 - 2014	25	
2012 - 2013	23	

	EREY Members	Sustaining Members	PHS Eligible
2016 - 2017	3	1	0
2015 - 2016	23	17	6
2014 - 2015	36	24	8
2013 - 2014	28	15	5
2012 - 2013	26	14	5

Annual Fund Report Range Comparison is the Annual Fund giving from 1 July to 31 July for current and previous years

The prior four-year average in Annual Fund giving from July through 31 July is \$2,238. 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.

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.

THE ROTARY FOUNDATION

THE TOP TEN FOR CLUB PRESIDENTS AND CLUB TRF CHAIRS



THE ROTARY FOUNDATION

- **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**

Rotary



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**

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THE ROTARY FOUNDATION

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August 6, 2016

The
Rotary
Foundation



EVERY
ROTARIAN
EVERY
YEAR



ROTARIANS ACCOMPLISH EXTRAORDINARY THINGS



OUR ROTARY FOUNDATION

MORE THAN \$3.5 BILLION

HUMANITARIAN AND EDUCATIONAL GRANTS SINCE 1947





Our Mission

EVERY
ROTARIAN
EVERY
YEAR

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

TRF Fund Development – 2013 - 14

CONTRIBUTIONS

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

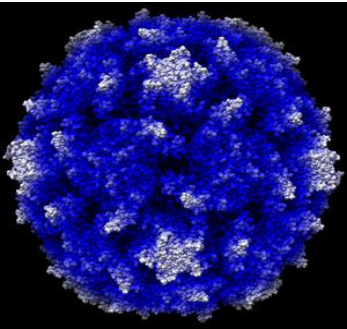
Total Contributions: \$246 million

PolioPlus:

Keep our Promise to Eradicate Polio

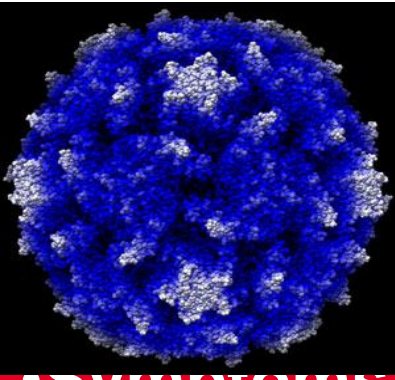


**END
POLIO
NOW**



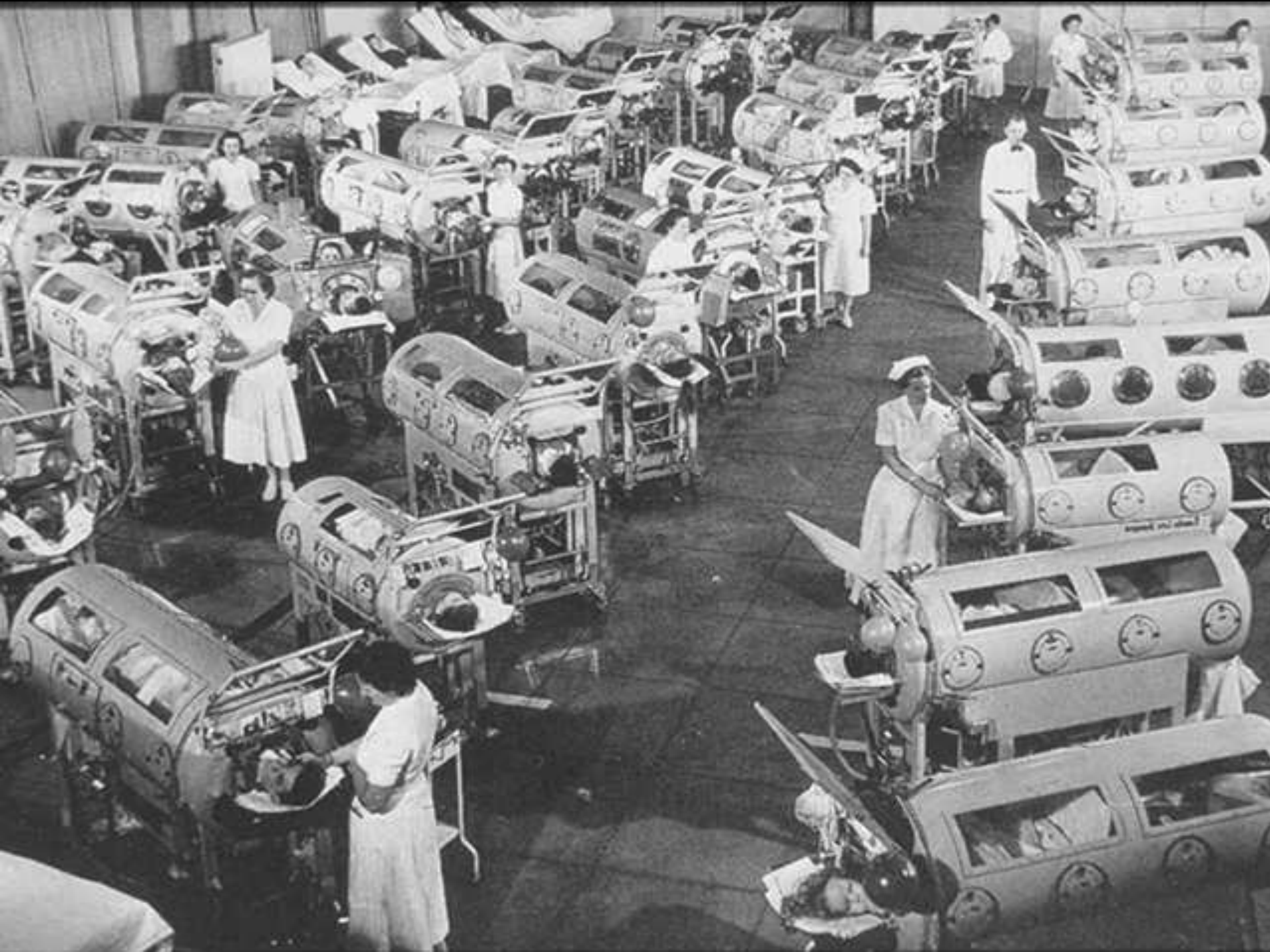
Polio - The Disease





Polio - The Disease

- **Symptoms**
- **Neurologic involvement**
- **Nonparalytic - 1-2%**
- **Paralytic < 0.1-0.5%**
- **Spinal ~ 79%**
- **Bulbospinal ~ 19%**
- **Bulbar ~ 2%**





PolioPlus



Rotary International



Governments of the World

BILL & MELINDA
GATES *foundation*



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





Major Developments



INDIA: NO Wild Polio Virus - more than 6 years!

AFRICA: NO " Polio Virus for 24 months!

World Wild Polio cases in 2015: 74

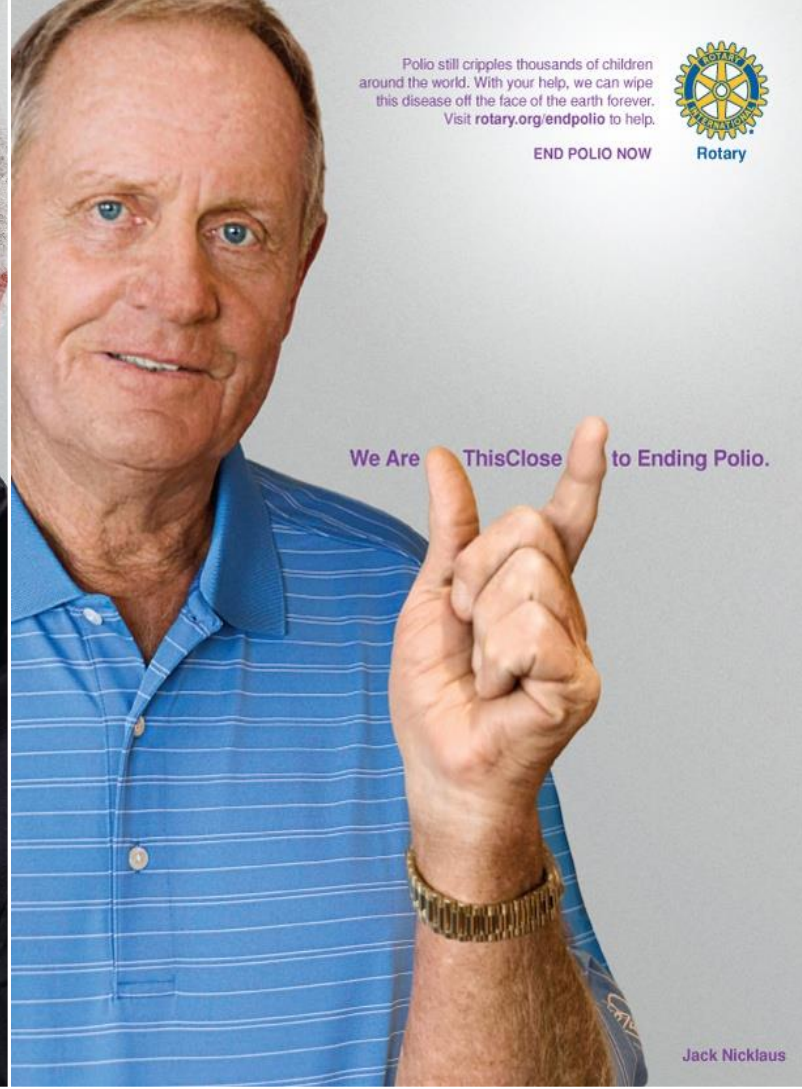
vs 359 in 2014

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!



Polio still cripples thousands of children around the world. With your help, we can wipe this disease off the face of the earth forever. Visit rotary.org/endpolio to help.



END POLIO NOW

Rotary

We Are ThisClose to Ending Polio.

Jack Nicklaus



THE RISKS



Strikes children **under 5**, causing paralysis and even death



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.



Scan to contribute

The
Rotary
Foundation





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

Rotary

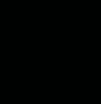
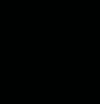
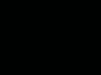
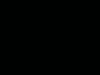


THE ROTARY FOUNDATION



August 6, 2016

THE ROTARY FOUNDATION CENTENNIAL



Rotary



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

Rotary



THE ROTARY FOUNDATION CENTENNIAL

- ❖ **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**

Rotary



THANK YOU!

Rotary



THE ROTARY FOUNDATION



August 6, 2016



August 6, 2010