

# CLUB ROTARY FOUNDATION COMMITTEE MANUAL



ROTARY INTERNATIONAL®

This is the 2006 edition of the *Club Rotary Foundation Committee Manual*. It is intended for use by 2007-08, 2008-09, and 2009-10 club committees. The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the 2007 Council on Legislation or the RI Board, override policy as stated in this publication.

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# Introduction

The *Club Rotary Foundation Committee Manual* was developed to help you establish goals and understand your responsibilities related to increasing club effectiveness. An effective Rotary club is able to:

- Sustain or increase its membership base
- Implement successful projects that address the needs of their community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

Under the Club Leadership Plan, the recommended administrative structure of Rotary Clubs has the following five standing committees:

- Club administration
- Membership
- Public relations
- Service projects
- Rotary Foundation

Each committee has a manual which provides an overview of the committee and its responsibilities as well as available resources, specific committee duties, and other relevant materials to support you and your committee members. Copy related sections of the *Club Rotary Foundation Committee Manual* and distribute to committee members. Additional copies of this manual can be downloaded for free at [www.rotary.org](http://www.rotary.org). The *Club Officers' Kit* (225-EN), including this manual, can be purchased through the *RI Catalog*.

## **Club Rotary Foundation Committee Chair**

Before the district assembly, review this manual in order to understand your role and responsibilities. Bring it to your district assembly to use as a reference.

At the district assembly, club leaders, including the club president-elect and the incoming secretary, treasurer, and committee chairs, will discuss their role and responsibilities, work on annual goals, and develop their working relationship for the coming year.

Complete the following discussion questions in advance to fully participate in the discussions at the district assembly:

What is the role of The Rotary Foundation committee?

What are your responsibilities in this role?

How can you help educate club members about The Rotary Foundation?

How can you practice stewardship of Rotary Foundation funds?

How does your club establish its Annual Programs Fund goal?

How can you help committee members serve effectively?

What are your long-range and annual goals?

**Comments?**

If you have questions or comments about this manual or any of RI's training resources, please direct them to:

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# Role and Responsibilities

Through The Rotary Foundation, each Rotarian has the power to change and empower lives. The mission of The Rotary Foundation is to support the efforts of Rotary International in the fulfillment of the Object of Rotary, Rotary's mission, and the achievement of world understanding and peace.

## Role

The Rotary Foundation committee develops and implements a plan to support the Foundation through program participation and financial contributions.

## Responsibilities

The Rotary Foundation committee has the following responsibilities, which are explained in this manual:

- Achieving club Foundation goals for the coming year (see Rotary Foundation Section of the *Planning Guide for Effective Rotary Clubs*)
- Educating club members about the Foundation (see Educate Club Members about the Foundation and Rotarian Contributions to The Rotary Foundation)
- Encouraging club members to participate in Foundation programs and support the Foundation financially (see Rotary Foundation Programs)
- Communicating the Foundation goals of the district and Trustees of The Rotary Foundation to club members (see Educate Club Members about the Foundation)

## Working with Club Committees

The Rotary Foundation committee should work with the following club committees to meet Foundation goals:

- Service projects committee (to consider if Rotary Foundation grants can be used to fund service projects)
- Public relations committee (to ensure timely promotion of Foundation projects and member participation)
- Club administration committee (to schedule a Rotary Foundation program each quarter and the presentation of service and contribution recognition)

## Subcommittees

Your committee may have the following subcommittees:

- Foundation programs
- Financial contributions

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Plan weekly meetings and activities in observance of Rotary Foundation Month (November), World Understanding Month (February), and Literacy Month (March).

If you have a larger club and are active in Foundation programs, you may consider all or some of the following subcommittees:

- Alumni
- Annual Programs Fund
- Grants
- Group Study Exchange
- Permanent Fund
- PolioPlus
- Rotary World Peace Fellowships
- Scholarships

### **Contents**

Copy and distribute materials to committee members as needed.

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## Rotary Foundation Resources

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### Informational Resources

Order publications through the *RI Catalog* (019-EN), or download them at [www.rotary.org](http://www.rotary.org).



***The Rotary Foundation Quick Reference Guide* (219-EN)** — Compilation of the programs and services of The Rotary Foundation in a quick reference format.

- *Donor Recognition Booklet* (189-MU) — Explains all available forms of Foundation donor recognition.
- *Every Rotarian, Every Year Club Success Kit* (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote contributions to the Annual Programs Fund.
- *Official Directory* (007-EN) — Contact information for RI and Foundation officers, committees, task forces, and Secretariat staff; worldwide listing of districts and governors; alphabetical listing of clubs within districts, including contact information.
- *Planning Guide for Effective Rotary Clubs* — Club assessment and goal-setting tool used to plan the club's Rotary Foundation goals (see pages 11-12).
- *PolioPlus Brochure* (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, a description of the contributions of Rotary and its major partners, and the challenges remaining to achieve a polio-free world.
- *Rotary Foundation Facts* (159-EN) — Brochure of the most recent Foundation statistics.
- *The Rotarian* (or Rotary regional magazine) — RI's official monthly magazine, which reports club and district projects, RI Board decisions, and RI meetings. In addition, 30 Rotary regional magazines in 23 languages serve Rotarians around the world.

### **[www.rotary.org](http://www.rotary.org)**

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- The Rotary Foundation ([www.rotary.org/foundation](http://www.rotary.org/foundation)) — Current source of detailed information on all aspects of Rotary Foundation programs, *Every Rotarian, Every Year* fundraising strategies, and recognition opportunities. Many free downloads are available.

Keyword searches:

- Gift Acceptance Policy Manual — Overview of gifts accepted by The Rotary Foundation, including gifts to the Permanent Fund.
- PolioPlus Partners Open Projects List — Database of projects in polio-endemic and high-risk countries that need support.
- Recognition programs — RI and Rotary Foundation awards and recognition programs, including Service Award for a Polio-Free World, Citation for Meritorious Service, Distinguished Service Award, and District Service Award.
- WCS Projects Exchange — Listing of club World Community Service projects that are seeking assistance with examples of successful projects.

### **Financial Resources**

- Club members
- Club or district foundation
- District Designated Fund
- Funds from individual donors or local businesses
- Grants from other foundations
- Humanitarian Grants Program

### **Human Resources**

Find contact information in the *Official Directory* or at [www.rotary.org](http://www.rotary.org), unless noted otherwise.

- Annual Programs Fund strategic adviser — Rotarian appointed to work with the regional Rotary Foundation coordinator to serve as the primary Annual Programs Fund resource for your region.
- District Rotary Foundation committee — Rotarians appointed to support your club's Rotary Foundation efforts. (Request contact information from your district.)
- District grants subcommittee chair — Member of the district Rotary Foundation committee appointed to help clubs pursue Foundation grants. Chair must certify your grant application before it can be submitted to The Rotary Foundation. (Request contact information from your district.)
- Major Gift adviser — Rotarian appointed to work with the regional Rotary Foundation coordinator to serve as the primary Permanent Fund and major gift resource for your specific region.
- National PolioPlus committees — Rotarians responsible for supporting PolioPlus at the national level and submitting project requests to the PolioPlus Partners program.
- Regional Rotary Foundation coordinator — Rotarian appointed to serve as the primary Foundation resource for your region.
- Rotary Foundation alumni coordinator — Rotarian appointed to work with the regional Rotary Foundation coordinator to encourage Rotary clubs and districts to involve Foundation alumni in Rotary activities.
- Rotary Foundation Development Services staff — Staff members at RI World Headquarters who can answer questions about recognition contributions to The Rotary Foundation.
- Rotary Foundation staff — Staff members at RI World Headquarters and international offices dedicated to supporting Rotarians, clubs, and districts for Rotary Foundation programs and fund development.

## Club Rotary Foundation Committee Chair

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As the chair of your committee, you're responsible for ensuring your committee achieves committee and club goals.

### Responsibilities

Before taking office, you have the following responsibilities:

- Reviewing your committee's manual
- Attending the district assembly
- Reviewing your club's bylaws, which should contain information on your committee's purpose
- Working with the president-elect to recruit committee members based on their professional abilities, and personal interests, and preparing them for the year
- Reviewing and establishing club long-range and annual goals with the president-elect using the *Planning Guide for Effective Rotary Clubs*
- Developing an action plan for your committee to achieve annual goals

During your year as committee chair, you have the following responsibilities:

- Planning and conducting regular committee meetings and activities
- Holding members accountable for the responsibilities they've accepted
- Reporting committee activities and progress to the club president and board of directors and the full club
- Cooperating with the appropriate district committee on multiclub activities or initiatives
- Recognizing committee members' work and efforts

### Committee Members

Work with the president-elect to select committee members to fill vacancies and conduct planning meetings before the start of the year. When feasible, committee members should be appointed to the same committee for three years for continuity. Committee members should have excellent communication skills. Other important characteristics to consider include:

- International experience
- Volunteer experience
- Fundraising experience

All committee members should attend the district Rotary Foundation seminar to learn about The Rotary Foundation, the district's Foundation goals, strategies to increase Foundation program participation and contributions, and what resources are available.

The club president serves as an ex officio member of all club committees.

To prepare committee members:

- Supply newer members with information on the committee and its activities.
- Pair new committee members with more experienced ones.
- Encourage networking with counterparts in other clubs (use the district directory).
- Know the resources available to your committee.
- Give members a list of district activities and meetings.

## Goal Setting

The *Planning Guide for Effective Rotary Clubs* is a goal-setting tool that helps the club president-elect work with club committees to assess the current state of the club and establish annual goals that support the club's long-range goals for the year. The planning guide also provides strategies that committees can use to achieve their goals. Each recommended club committee has a section in the planning guide. You'll have an opportunity to work on the planning guide with your club president-elect and other incoming club leaders during the district assembly. The *Planning Guide for Effective Rotary Clubs* can be used throughout the year to help measure progress toward established goals. It should be reviewed periodically and updated as needed.

**Establishing effective goals.** To ensure that the goals established accurately reflect committee capabilities and club interests, committee goals should be

- **Shared.** Those who participate in setting a goal and developing strategies to achieve that goal are committed to implementing it. Consult with club leaders, club members, and district leaders in setting a goal.
- **Measurable.** A goal should provide a tangible point to pursue.
- **Challenging.** A goal should be ambitious enough to go beyond what the club has accomplished in the past.
- **Achievable.** Rotarians should be able to accomplish the goal with the resources available. Compare goals to previous goals achieved by the committee and the club.
- **Time specific.** A goal should have a deadline or timeline.

**Developing an action plan.** Work with club leaders and committee members to develop an action plan that outlines the steps needed to achieve each goal. The following steps can help you develop an action plan:

- Establish a time frame for each step.
- Determine who is responsible for implementing each step.
- Establish the criteria for measuring progress and success for each step.
- Consider the resources and tools available from your club, district, and RI to support the goal.
- Secure human, informational, and financial resources before taking action.
- Evaluate the success of previous goals and your current plan, making modifications as necessary.

Ensure steady progress is being made toward achievement of goals as envisioned.

**Motivating committee members to follow the action plan.** Because Rotarians are volunteers, what motivates them in their profession may not motivate them in Rotary. Consider the motivational needs of each committee member. Common motivators include:

- Belief that the goal will benefit the community and their club, district, and Rotary
- Opportunities for fellowship
- Opportunities for networking
- Belief that the goal is achievable and they will be successful
- Assignments that are challenging or use their expertise
- Recognition of efforts and time spent working toward committee goals

Using these motivating factors can help maintain member commitment to Rotary and encourages continued participation in club activities.

## Budget

Before 1 July, work with your committee and the incoming club treasurer to determine what funds your committee will need to achieve its goals. Also include any planned fundraising activities. Ensure your committee's financial needs are included in the club budget.

Provide oversight of committee funds, transactions, and reports, and be aware of the financial condition of your committee's budget at all times. By meeting regularly with your club's treasurer, you can take early corrective measures if issues arise.

## Communication

Before the start of the year, develop a communication plan with other club leaders that outlines with whom, when, and how you'll communicate, including communications with:

- **Committee members.** Committees should meet regularly to review and identify available resources, discuss ongoing projects and new initiatives, and develop strategies to achieve committee and club goals.
- **Your club.** Report your committee's activities, including action plans and progress toward goals, to your club's president, board, and all club members.
- **Other committees.** Often, the work of one committee affects the work of another. For example, the public relations committee's work to raise community awareness of Rotary may influence the membership committee's recruitment efforts. Effective communication will help committees work together to coordinate projects and initiatives.
- **Your district.** If your committee needs guidance or information, contact your district counterpart or your assistant governor.

## Additional Resources

In addition to your committee's resources, the following resources can help you fulfill your responsibilities and answer committee members' questions:

### *Informational Resources*

Order publications from the *RI Catalog* (019-EN), or download them at [www.rotary.org](http://www.rotary.org).

- District directory — Listing of district leaders and activities (if your district produces a directory).
- *Manual of Procedure* (035-EN) — RI and Rotary Foundation policies and procedures established by legislative action, the RI Board of Directors, and the Trustees of The Rotary Foundation, issued every three years following the Council on Legislation. Contains the RI constitutional documents.
- Recommended Rotary Club Bylaws — A legal document that expands on club operations guidelines in the club constitution.
- Rotary Code of Policies and Rotary Foundation Code of Policies — Policies and procedures established by the RI Board of Directors and the Trustees of The Rotary Foundation in support of the RI Constitution and Bylaws, revised following each Board or Trustees meeting.
- Standard Rotary Club Constitution — A constitutional document that is a framework for Rotary club operations.

*www.rotary.org*

The RI Web site provides online resources and up-to-date information on all aspects of Rotary. You can download free publications, shop the online catalog, and locate the meeting time and place of any Rotary club.

Click on:

- Club-District Support ([www.rotary.org/support](http://www.rotary.org/support)) — Resources for club and district officers, including the most up-to-date versions of the Recommended Rotary Club Bylaws and Standard Rotary Club Constitution.

#### *Financial Resources*

- Funds from individual donors or local businesses
- Grants from other foundations
- Rotary Foundation grants for club and district humanitarian projects

#### *Human Resources*

Unless otherwise noted, contact information is available from your district.

- Assistant governor — Rotarian appointed to assist the governor with the administration of designated clubs. Your assistant governor will visit your club quarterly (or more often) and is available to answer questions or provide advice.
- Other club committee chairs in your district — Club leaders who can serve as a resource to help support your club's projects and initiatives.
- District governor — RI officer responsible for advising your club on strategies to make your club more effective. (Find contact information in the *Official Directory*.)
- Past club committee chairs and leaders — Knowledgeable Rotarians who can advise you as you plan your year and can be assigned to lead committee activities.
- RI and Rotary Foundation resource groups/task forces — Groups of Rotarians appointed by the RI president to assist Rotary clubs and districts with the presidential emphases. (Find contact information in the *Official Directory*.)

# PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs assess their current state and establish goals for the coming year. It is based on the Club Leadership Plan. The strategies listed in this section are common ways clubs might choose to pursue The Rotary Foundation goals. Clubs are encouraged to develop alternative strategies to achieve their The Rotary Foundation goals when appropriate.

Download a Microsoft Word version at [www.rotary.org](http://www.rotary.org).

## THE ROTARY FOUNDATION

### Current State

Number of grants awarded:

District Simplified Grants: \_\_\_\_\_ Volunteer Service Grants: \_\_\_\_\_

Matching Grants: \_\_\_\_\_ Health Hunger and Humanity (3-H) Grants: \_\_\_\_\_

Number of Ambassadorial Scholars: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of GSE team members: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Rotary Grants for University Teachers: Nominated \_\_\_\_\_ Selected \_\_\_\_\_

Number of Rotary World Peace Fellows: Nominated \_\_\_\_\_ Selected \_\_\_\_\_ Hosted \_\_\_\_\_

Number of Rotary Conflict Studies Fellows: Nominated \_\_\_\_\_ Selected \_\_\_\_\_

Number of PolioPlus or PolioPlus Partners activities: \_\_\_\_\_

Current year's contributions to Annual Programs Fund: \_\_\_\_\_

Current year's contributions to Permanent Fund: \_\_\_\_\_

Number of club members who are

Paul Harris Fellows: \_\_\_\_\_ Benefactors: \_\_\_\_\_ Major Donors: \_\_\_\_\_

Rotary Foundation Sustaining Members: \_\_\_\_\_ Bequest Society Members: \_\_\_\_\_

Number of Foundation alumni tracked by your club: \_\_\_\_\_

### Future State

Our club has established the following Rotary Foundation goals for the upcoming Rotary year:

Our club's Annual Programs Fund contribution goal is \_\_\_\_\_.

Our club's Permanent Fund contribution goal is \_\_\_\_\_.

Our club will participate in the following Rotary Foundation programs:

**How does the club plan to achieve its Rotary Foundation goals? (check all that apply)**

- Ensure the club's Rotary Foundation committee understands the programs of The Rotary Foundation and is committed to promoting financial support of the Foundation
- Help club members understand the relationship between Foundation giving and Foundation programs
- Plan a club program about The Rotary Foundation every quarter, especially in November, Rotary Foundation Month

- Include a brief story about The Rotary Foundation in every club program
- Schedule presentations that inform club members about The Rotary Foundation
- Ensure club's Rotary Foundation committee chair attends the district Rotary Foundation seminar
- Use Rotary Foundation grants to support the club's international projects
- Recognize club members' financial contributions to The Rotary Foundation and their participation in Foundation programs
- Encourage each club member to contribute to the Foundation every year
- Participate in:
  - Group Study Exchange                       PolioPlus/PolioPlus Partners
  - Matching Grants                                       Host/Sponsor Ambassadorial Scholar(s)
  - District Simplified Grants                       Sponsor a Rotary World Peace Fellow
  - 3-H Grants     Sponsor a University Teacher
  - Volunteer Service Grants                       Sponsor a Rotary Conflict Studies Fellow
- Invite Foundation program participants and alumni to be part of club programs and activities
- Other (please describe):

**Action steps:**

## Rotary Foundation Programs

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The Rotary Foundation has three main program areas:

- Educational Programs
- Humanitarian Grants Program
- PolioPlus

Participants in these programs are Foundation alumni and are a valuable resource to Rotary clubs during and long after their participation.

### Educational Programs

Through Educational Programs, The Rotary Foundation furthers international understanding by providing opportunities for students, educators, and business and professional people to experience another culture and develop long-lasting relationships with peers in other countries. Educational programs help participants learn about the needs of their local and world communities and the opportunities available through Rotary to address those needs.

The educational programs include:

- Ambassadorial Scholarships
- Rotary Grants for University Teachers
- Group Study Exchange
- Rotary Centers for International Studies in peace and conflict resolution
- Rotary Peace and Conflict Studies (Chulalongkorn University)

Rotarians are involved in the selection, orientation, and hosting of Educational Programs participants. Your club can get involved with Educational Programs in a variety of ways:

- Invite current and past scholars, Rotary World Peace Fellows, and Group Study Exchange team members to share their experiences with your club.
- Nominate Ambassadorial Scholars, Rotary World Peace Fellows, Rotary Peace and Conflict Studies Fellows, Rotary Grants for University Teachers recipients, or Group Study Exchange team members.
- Publicize the exchange opportunity.
- Serve as hosts and counselors to program participants.

### Humanitarian Grants Program

The Humanitarian Grants Program provides grants to Rotary clubs and districts to implement humanitarian projects. The following grants are available to address different service needs and funding options:

- Matching Grants
- District Simplified Grants
- Health, Hunger and Humanity (3-H) Grants
- Volunteer Service Grants

The Trustees of The Rotary Foundation have established the following standards to guide the program:

- Grants should address humanitarian needs with the aim of providing sustainable development.

- All Rotary Foundation grants require the active participation of Rotarians.
- Grants should assist in the development of stronger Rotary networks.

All grants must display a commitment to stewardship of funds, which reflects The Four-Way Test and responsible fiscal oversight. Stewardship includes:

- Detailed project planning
- Submitting complete and accurate applications with documentation
- Direct Rotarian involvement in the implementation of the project
- Transparency in all financial transactions
- Reporting in an efficient and effective manner

Find detailed requirements for the Humanitarian Grants Program at [www.rotary.org/foundation](http://www.rotary.org/foundation).

### **PolioPlus**



PolioPlus is the corporate program of Rotary International and its Foundation. It is Rotary's most recognized program, and its goal is to eradicate polio. More than one million Rotarians worldwide have contributed US\$650 million to PolioPlus. In addition, Rotarians serve as a powerful volunteer network at the local level providing support at clinics and mobilizing their communities for immunization or other polio eradication activities. The PolioPlus Partners program allows Rotary clubs, districts, and individual Rotarians to voluntarily assist in reaching Rotary's goal of a polio-free world. Your club can ensure that the goal of global polio eradication is achieved by conducting the following activities:

- Working with local health officials to maintain high rates of immunization for polio and other diseases
- Contributing to the PolioPlus program to support critical global eradication needs in polio-endemic countries
- Participating in PolioPlus Partners to help provide supplemental support to Rotarians who are working to eradicate polio in their countries
- Devoting a weekly club program to the topic of polio eradication
- Ensuring club members remain informed and involved until the world is certified polio-free
- Contacting national PolioPlus committee chairs to assist with surveillance activities

### **Foundation Alumni**

More than 90,000 people have received program awards from The Rotary Foundation since 1947. It is important to maintain contact with former Foundation program participants in your area because they are powerful advocates for The Rotary Foundation and are potential donors to The Rotary Foundation. Alumni can also help your club by

- Connecting Rotary clubs from different countries for service projects and fellowship
- Sharing with club members and the media how their experience in the Rotary program changed their life
- Promoting the program opportunity to their peers
- Advising on selection, orientation, and hosting programs

Contact The Rotary Foundation alumni coordinator for your region to find out how you can integrate Foundation alumni into club activities.

## Educate Club Members about the Foundation

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When Rotarians understand that The Rotary Foundation changes people's lives, they are eager to participate in and support its programs financially.

Educating your fellow club members about the programs of The Rotary Foundation and why they should support it financially will help the Foundation committee achieve its goals.

### Club Programs on the Foundation

Work with the club president and club administration committee to schedule a weekly meeting program on The Rotary Foundation each quarter of the year. Strive to have the program put a human face on what The Rotary Foundation does to save and change lives. Spotlight Foundation programs by inviting alumni from the following programs to present their experiences:

- Group Study Exchange
- Ambassadorial Scholarships
- Rotary Centers for International Studies in peace and conflict resolution
- Grants for University Teachers
- Volunteer Service Grants

Presentations should highlight the benefits of participating in the Foundation programs to Rotarians, your Rotary club, and the alumni. Inform the alumni of your expectations before the presentation. Use Foundation videos and pamphlets, available through the *RI Catalog*, to enhance Foundation presentations.

### Member Participation in Foundation Programs

Help club members understand the effect of Foundation programs by encouraging them to get involved by volunteering for a project. Once club members have experienced the power of The Rotary Foundation, involve them by having them share their experiences and enthusiasm with other club members.

When properly publicized, participation in Foundation programs often attracts new members to the club.

### Weekly Rotary Foundation Thought

At the beginning of each club meeting, show how The Rotary Foundation saves and changes lives. Having the weekly thought presented by a different Rotarian each week will allow club members to hear about the Foundation from different perspectives. To avoid inconsistent or uninteresting presentations, ensure Rotarians understand what is intended for the weekly thought by providing the following information:

- Date of presentation
- Length of presentation (2-3 minutes)
- Answers the question "How does The Rotary Foundation save and change lives?"
- Resources for thought include:
  - Personal experience
  - *The Rotarian* or Rotary regional magazine
  - RI Web site

### **Foundation Seminars**

Encourage club members to attend the district Rotary Foundation seminar to learn about the Foundation and how they might get involved. The club Rotary Foundation committee can also hold a club Foundation seminar to increase attendance and tailor the agenda to the knowledge level and interests of club members. The agenda might include the following:

- Overview of the Foundation
- Club and district Rotary Foundation committee's role
- Humanitarian Grants Program
- Educational Programs
- PolioPlus
- Raising money for the Foundation
- Finding support for Foundation initiatives from the district Rotary Foundation committee
- Donor recognition and understanding club Foundation reports

Members of your district's Rotary Foundation committee and your regional Rotary Foundation coordinator can help with your club Foundation seminar.

## Rotarian Contributions to The Rotary Foundation

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Rotary Foundation programs are funded by voluntary contributions from Rotarians worldwide. When Rotarians see the extraordinary results of education, cultural exchanges, and humanitarian projects, they understand why supporting The Rotary Foundation financially is vital to making the world a better place. Contributions sent to the Foundation can be directed to the Annual Programs Fund, the Permanent Fund, or the PolioPlus Fund.

### Annual Programs Fund — For Support Today



The Annual Programs Fund is the primary source of support for the programs of The Rotary Foundation. Money from the Annual Programs Fund is spent every year on Foundation programs, such as Group Study Exchange, Ambassadorial Scholars, District Simplified Grants, and Matching Grants. Rotarians are encouraged to make financial contributions to The Rotary Foundation annually. To support the Every Rotarian, Every Year effort, you should:

- Make your gift to the Foundation early in the Rotary year.
- Encourage and ask every club member to make a gift every year.
- Inform members of how their contributions to the Annual Programs Fund support Foundation programs that achieve good in the world.
- Recognize those who support The Rotary Foundation.

### Permanent Fund — To Secure Tomorrow



The Permanent Fund is Rotary's endowment. The principal is never spent, and a portion of the earnings are directed toward Foundation programs. Donations to the Permanent Fund can be outright gifts, securities, bequests, or life-income agreements. Many Rotarians direct substantial gifts to the Permanent Fund. If you know a member of your club has the capacity to make a large gift to The Rotary Foundation, please contact the Major Gift adviser or regional Rotary Foundation coordinator serving your area.

### PolioPlus Fund

Rotarians may still make contributions to help eradicate polio through the PolioPlus Fund. Grants made from this fund help pay for National Immunization Days and surveillance activities. Rotary districts may also direct District Designated Fund allocations to the PolioPlus fund.

### SHARE and the District Designated Fund

Through the *SHARE* system, contributions to The Rotary Foundation are transformed into Ambassadorial Scholarships, Matching Grants, Group Study Exchanges, and other Foundation programs awards and activities. Through *SHARE*, the Foundation Trustees involve Rotarians worldwide in the decision-making process for Foundation programs. No other foundation gives its donors the freedom to decide how contributions are spent.

At the end of every Rotary year, contributions to the Annual Programs Fund from all of the Rotary clubs in a district are divided into two funds:

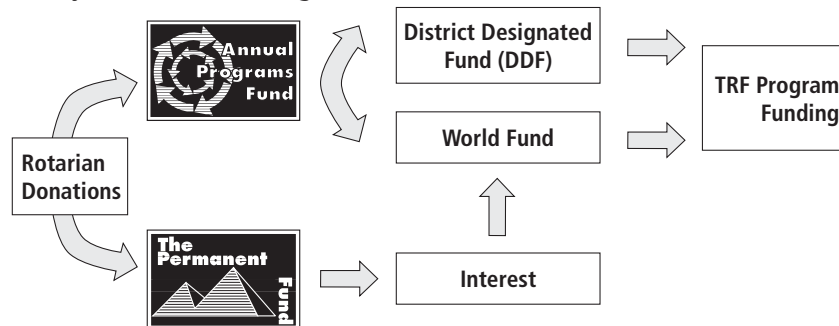
- 50 percent credited to the World Fund
- 50 percent credited to the District Designated Fund (DDF)

The Foundation uses the World Fund portion to pay for the worldwide programs available to all Rotary districts, such as Group Study Exchange, Matching Grants, and 3-H Grants. Your district uses the DDF portion to fund the Foundation programs of its choice.

The Rotary Foundation's unique funding cycle uses contributions for programs three years after they are received. The three-year cycle gives districts time to plan programs and select participants and allows the Foundation to invest the contributions. The earnings from those investments pay for general administration and fund development expenses.

Your district Rotary Foundation committee is responsible for deciding how to use the district's available District Designated Fund, in consultation with the clubs in your district. Contact your district Rotary Foundation committee chair to learn how the district plans to use its available District Designated Fund.

### Rotary Foundation Funding



### Donation Recognition

The sincere acknowledgement of a donor's gift is the first step toward additional financial support. The Rotary Foundation presents recognition to donors in appreciation of financial contributions or commitments for future contributions.

#### Recognition for Individuals

- Rotary Foundation Sustaining Member
- Paul Harris Fellow Recognition
- Multiple Paul Harris Fellow
- Memorial Paul Harris Fellow
- Memorial Paul Harris Certificate
- Major Donor
- Benefactor
- Annual Programs Fund Recognition banner
- The Rotary Foundation Bequest Society
- Certificate of Appreciation (also available to corporations)

***Recognition for Clubs***

- 100% Rotary Foundation Sustaining Member Club banner (awarded annually)
- Every Rotarian, Every Year banner (awarded annually)
- Top Three Annual Programs Fund Per Capita Club banners (per district; awarded annually)
- 100% Paul Harris Fellow Club banner (upon request)

See the *Donor Recognition Booklet* for detailed information.







**Maximize your club's potential.**

**Use the *Planning Guide*  
for *Effective Rotary Clubs*  
to take control of its future.**

Find it in the *Club Rotary Foundation Committee Manual* or at [www.rotary.org](http://www.rotary.org).



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