

Carolinas' PETS 2017: YOUR Rotary Foundation

(Total Time: 60 Minutes) (Final 1/11/17)

Discussion Leader Notes

- ***Smile: Plan your “engagement” plan! (Note: This session has an IMPORTANT “Best Practices” Grid and 6 other Handouts/Reference Documents)***
- ***Pre-arrange the location of your BLANK flip chart***
- ***Introduce yourself to the group and explain your role as the facilitator of their discussion; you may wish to greet each participant individually as they enter and find a seat***
- ***Discuss your expectations and group guidelines (such as taking turns speaking, welcoming and accepting all questions/comments, and asking the group to turn off all cell phones)***
- ***Review the session’s learning objectives with the participants (see below and also your notes)***
- ***Encourage participants to take notes; try to gauge the participants’ knowledge and Rotary experience and adjust the facilitated discussions accordingly***

Learning Objectives

At the end of this session, participants will be able to:

- 1. Identify the 6 areas of Rotary Foundation focus and how they relate to Rotary Foundation grants***
- 2. Understand the IMPORTANCE of YOUR leadership role AND how to support and communicate Foundation programs***
- 3. Increase your knowledge about the types of Rotary Foundation grants and understand how clubs can use Foundation grants***
- 4. Lead YOUR club in establishing Foundation support goals***
- 5. Learn about your Foundation’s Grant Funding & Management Model***
- 6. How to use Public Awareness to increase Foundation Gifts***
- 7. Identify the “best practices” of successful clubs.***

If you haven't already done so, please POINT OUT the PETS 2016 "Your Rotary Foundation" Best Practices Grid Handout.

SHARE YOUR BEST PRACTICES

Foundation Focus Areas

Club Foundation Committee

Knowledge of YOUR Foundation

Foundation Programs

District Foundation Seminar

Promoting YOUR Foundation

Recognizing Club Members
For Their Foundation Support

Getting Involved In Projects

INITIAL DL TALKING POINTS: (5 Minutes)

- ***YOU have an IMPORTANT ROLE to play as Club President in supporting the Rotary Foundation (It's YOUR foundation)!***
- ***What is the best resource for helping you and your club achieve (or surpass) its Rotary Foundation goals? (Hint: it's a very key club committee)***
- ***How would you rate/assess your personal knowledge of the programs and initiatives of the Rotary Foundation?***
 - A. Strong?***
 - B. Pretty good?***
 - C. Average?***
 - D. Not sure?***
 - E. (Hint: There's a message here: both you and your club's Rotary Foundation Committee (not just the Foundation Chair) should be knowledgeable!)***
- ***Could your club benefit by "discovering" an international humanitarian project and by applying for a District or Global Grant to assist your club's efforts? (Hint: Look for answers here today. See if any reference the old Project Link, now found at <http://ideas.rotary.org>)***
- ***Are Rotarians the only source of funding for The Rotary Foundation?***
- ***Do you understand the Foundation's grant model?***
- ***What will be **YOUR** legacy of leadership and support for the Rotary Foundation?***

Programs of the Rotary Foundation (12-15 Minutes)

Q. How well do your club members “connect” with the Rotary Foundation? Your success stories and feedback will be very helpful here!

Discussion Leader Notes

- *If presidents-elect do not volunteer to share personal stories, be prepared to share your own personal story/experience*
-

Talking Points (COVER THESE 2 POINTS)

- *The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. The Rotary Foundation’s motto is “Doing Good in the World.”*
- *Foundation programs are supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world.*

Q. What are the Rotary Foundation’s 6 Areas of Focus?

Key Points

- *The Rotary Foundation has 6 specific Areas of Focus:*
(<https://www.rotary.org/en/learning-reference/about-rotary/areas-focus>)
 - *Promoting Peace*
 - *Fighting Disease*
 - *Providing Clean Water*
 - *Saving Mothers and Children*
 - *Supporting Education*
 - *Growing Local Economies*

Q. Why are these areas SO important to us as Rotarians?

Discussion Leader Notes

(Paraphrase) The Rotary Foundation IS the cornerstone of our organization! Your role here is to help the Presidents-Elect understand WHY we have these specific areas of focus and why they are important as we serve humanity.

Q. HOW will you engage your club to achieve your club's Rotary Foundation Goal?

Key Points

- **THE BEST RESOURCE is your club's Rotary Foundation committee:**
 - **Is the primary, time-tested, and essential resource for helping clubs achieve Foundation goals**
 - **Helps create awareness/inspiration and should provide ongoing Foundation information to educate Rotarians**
 - **Develops and carries out plans to support the The Rotary Foundation's Programs through club participation and financial contributions. Remind that Impact Drives Income (in other words, TRF Program's results drive contributions, and not the other way around).**
 - **Is a proven "Best Practice" of successful Rotary clubs**

Discussion Leader Note

- **Here is an optional/potential GROUP DISCUSSION TOPIC:**

Q. As President, HOW will YOU support your club's Foundation Committee?

Some Potential Responses:

- **Meet with the club's Foundation Committee (include the future club presidents too) BEFORE and DURING your term of leadership to review current and long-term Foundation goals and their achievement**
- **Attend and encourage attendance at your district Rotary Foundation seminars and other related events**
- **Help encourage club participation in Foundation giving and programs; lead by personal example and encourage your Board of Directors to also lead by example**
- **Support Foundation programs that offer opportunities for involvement and membership growth and retention**
- **Inspire contributions from club members**
- **Identify what resources are available to help the club participate in Foundation programs**
- **Ensure that the club committee is working with the district's Rotary Foundation Committee**

Supporting Rotary Foundation Programs (12 Minutes)

What are the key programs of your Rotary Foundation and how do they work?

Talking Points (Look for these ideas!)

- **The eradication of Polio (aka PolioPlus) is the highest priority “program” of Rotary International and supports the immunization activities of Rotary International and the other major partners of the Global Polio Eradication Initiative (the Bill & Melinda Gates Foundation, the World Health Organization, UNICEF, and the U.S. Centers for Disease Control).**
- **The Annual Fund and the Endowment Fund are the sources of funding for the programs of The Rotary Foundation.**
- **Annual Funds are invested for 3 years. The earnings from this investment cycle are used to cover administrative expenses.**
- **Each district’s Annual Fund contributions for a Rotary year are equally split into the District Designated Funds and the World Fund.**
- **Districts use their District Designated Funds to participate in Foundation programs of their choice.**
- **The World Fund pays for programs for which every district may apply, such as Scholarships, Vocational Training Teams, and Global Grants.**
- **The Endowment Fund is held in perpetuity. The principal is never spent, and a portion of the earnings is used each year to help pay for programs (like the Peace Fellows Program).**

Q. Are there Foundation goals that the President-Elect must complete?

Discussion Leader Notes

- **All of you should be submitting your Foundation goals via Rotary Club Central. Club presidents-elect report their club’s goals through Rotary Club Central. Your club Foundation goals include:**
 - **Annual Fund goals**
 - **Endowment Fund goals**
 - **Polio Plus fundraising**
- **Be sure that YOU understand the use of Club Central the benefits to your club!**

Q. What does “100% Foundation Giving Club” mean?

Sample Responses:

- *Every Rotarian makes a contribution to The Rotary Foundation*
- *Every child has the opportunity to learn to read and write*
- *Every community has clean water*
- *Every person lives in a polio-free world*
- *To be considered an 100% Foundation Giving Club, your club must have all members give some amount to The Rotary Foundation AND the average contribution is at least \$100 to any Rotary Foundation gift designation.*

Q. What is your role in giving to The Rotary Foundation?

Sample Responses

- *Make YOUR personal gift to the Foundation early in the Rotary year*
- *Encourage your club officers and club members to make a gift every year (Lead by your example!)*
- *Provide periodic reminders of gifting to The Rotary Foundation*
- *Inform members of how their contributions to the Annual Fund support Foundation programs that achieve good in the world*
- *Recognize Rotarians who support The Rotary Foundation; make the recognitions special (and often as reminders to other Rotarians)*
- *Sign up for Rotary Direct and give on a recurring basis via your credit card*

Q. Have you set the fundraising goals for your club?

Talking Points (Look for these ideas!)

- *The worldwide Annual Fund goal is an accumulation of club goals.*
- *To establish an Annual Fund goal, using Club Central, club presidents-elect should examine the club’s previous giving to the Foundation and determine a challenge goal.*
- *The Annual Fund goal is also a pledge from Rotarians to make the world a better place.*
- *The Rotary Foundation is the essence/”driver” of “Doing Good In the World”.*

Q. Why is stewardship of RI funds important?

Talking Points (Look for these ideas!)

- *The funds that support Rotary Foundation programs and grants were donated by you and fellow Rotarians.*
- *Humanitarian grant project participants must manage the funds received from the Rotary Foundation responsibly and with full disclosure.*
- *Stewardship includes project planning, submission of completed and accurate applications, direct Rotarian involvement, transparency in all financial transactions, and effective/timely reporting.*
- *Transparency and proper use of Foundation funds help build confidence in The Rotary Foundation as a worthy and effective charitable organization.*

Q. How many of you have attended your district's Rotary Foundation Seminar? How can the district Rotary Foundation Seminar help your club achieve its Foundation goals?

(Sample Responses)

- *The district Rotary Foundation Seminar provides an opportunity to:*
 - *Share goals for the coming Rotary year*
 - *Discover opportunities to PARTNER with other clubs in both local and international service projects*
 - *Introduce newer Rotarians to The Rotary Foundation and reacquaint other Rotarians about the work of the Foundation in the district and around the world*
 - *Learn about resources, other club fund-raising ideas, and tools to motivate Rotarians to support The Rotary Foundation*
 - *Understand the importance of financial support of Foundation programs*

Rotary Foundation Grants Model *(12-15 Minutes)*

Q. What is the Rotary Foundation's Grant Model?

Your Foundation's GRANT MODEL was created to support both club and district humanitarian and educational grants.

Q. How does it work?

Under the Grant Model, the Foundation offers two types of grants, and there will be only two grant types: Rotary Foundation District Grants and Rotary Foundation Global Grants.

Rotary Foundation District Grants are block grants made to districts to support smaller projects both locally and internationally. District grants are funded solely by DDF generated from a district's Annual Fund giving from three years prior, and Endowment Fund SHARE earnings. Any unused district grant funds are returned to the Foundation and credited back to the district's DDF balance. DDF will continue to rollover to a district's balance for the following year. Rollover DDF will not be used in the calculation of the district grant amount, but will supplement the DDF allocated for Global Grants and other specific Foundation programs.

Districts may use up to 50 percent of their available District Designated Fund for these grants in each Rotary year and administer the grants without the Foundation's involvement. Specific district criteria are covered at the District Foundation Grants Seminar (different than the Foundation Seminar). Districts are responsible for administering the activities undertaken with these funds. They may disperse these grant funds at their discretion for district- or club-sponsored activities. In addition:

- ***All activities funded with district grant funds must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.***
- ***Districts must be qualified by the Foundation to receive district grant funds.***
- ***Districts can set their own criteria for district grants and clubs need to comply with such criteria in order to qualify to receive grants.***

Activities are NOT required to support the Areas of Focus.

Rotary Foundation Global Grants support larger projects (greater than \$30k USD) with sustainable, high impact outcomes in one of six areas of focus. These grants would be administered by the Foundation. Applications are entered vis the Grants Tool on MyRotary.

Global Grants utilize the other 50 percent of their District Designated Fund (DDF).

- ***All activities funded with grant funds must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.***
- ***Clubs and Districts must be qualified by the Foundation to receive grant funds.***
- ***Activities ARE required to support the Areas of Focus.***

Club- and district-developed global grants

Clubs and districts can use District Designated Fund (DDF) or cash contributions to fund global grant activities and get matching funds from the Foundation. When developing activities, clubs and districts should consider the following:

- **Activities must be sustainable and measurable. For example:**
 - **How will a project benefit the selected community in the future, after the grant has been spent?**
 - **How will a scholar's studies support one or more of the areas of focus?**
 - **How will a vocational training team project support capacity building, either for the team or the benefiting community?**
- **Activities should stem from real community needs. Community needs assessment tools are available to help identify community needs. Global grants must be sponsored by two Rotary clubs or districts: a host partner in the country where the activity takes place and an international partner outside the country. NOTE: Think about how we in the USA can be the host partner to do a project in our country and partnering with a Rotary club from another country.**
- **Both partners must be actively involved in the planning and implementing of all global grants. This includes maintaining communication and developing plans for the shared responsibilities in all of the grant's stages.**

Q. What are the benefits of Rotary's Grant Model?

Key Points

- **The grant model:**
 - **Simplifies processes**
 - **Expands service opportunities**
 - **Builds a stronger sense of ownership among Rotarians for their Foundation**
 - **Increases the collective impact of grants by concentrating more on the six (6) areas of focus**

DL Note: There are a number of excellent Rotary Foundation resources prepared and available for you.

They are shown in Handout #7 for this session. Don't miss them!

Q. What are some of YOUR club's "Best Practices" regarding the Rotary Foundation?

Talking Points (Look for the ideas BELOW!)

Rotary Foundation Club "Best Practices"

- **Public Image was utilized to increase giving to TRF**
- **Establish/strengthen your club's Rotary Foundation Committee**
- **Plan a club program about the Rotary Foundation every quarter (especially in October for World Polio Day, and in November, Rotary Foundation Month, and in February for Rotary's birthday)**
- **Include a brief story about the Rotary Foundation in every club program (e.g., a "Foundation Minute")**
- **Schedule presentations that inform club members (especially new members) about your Rotary Foundation**
- **Ensure that your club is well-represented (by YOU and your Foundation Committee Chair and Foundation Committee members at the district Foundation events)**
- **Seek out ways to use and participate in Rotary Foundation Grants**
- **Investigate "partnering" opportunities with other clubs**
- **Recognize (warmly, publicly, and often) club members' financial contributions to TRF and their participation in Foundation programs; make recognitions special! (Example: Invite your Governor to present new Paul Harris Fellow recognitions)**
- **Help club members understand the relationship between Foundation giving and Foundation grants/programs**

DL Session Wrap-Up & Review (3-4 Minutes)

- ***Have you looked back at your club's history of supporting the Rotary Foundation?***
- ***Are there any "trends" or "patterns" of support for the Rotary Foundation in your club's history? Would you be proud of what you discovered? What can you do now to grow and promote your club's support of the "heart" of Rotary, The Rotary Foundation?***
- ***Would a stronger emphasis on INDIVIDUALLY recognizing those from your club who support the Rotary Foundation help you in achieving your Foundation goals? (Hint: Again, ask your Governor to join you in presenting new Paul Harris Fellow and Foundation Benefactor, etc., recognitions; make these recognitions very special!)***
- ***Have you asked your club's Rotary Foundation Committee to set a goal for your year of leadership and report back? (Hint: Ask all of your key committees to propose annual goals and get your club to adopt them!)***
- ***Would a regular Club Assembly about the programs and great work of your Rotary Foundation assist you and your club in achieving your Foundation support goals? (Hint: Yes!)***
- ***What does the phrase "Every Rotarian, Every Year" REALLY mean to you and your club?***
- ***What is YOUR personal goal to support The Rotary Foundation?***
- ***DL: Review the Learning Objectives to ensure that all topics were covered sufficiently. Answer any questions and let the participants know how to contact you if they have questions later. Your contact information is _____.***
- ***Ask participants to share something that they learned during the session and an action they will take as a result of this session. Participants can share with the person next to them or with the entire group.***
- **THANK THE GROUP**
- **END OF SESSION**

YOUR ROTARY FOUNDATION

HANDOUTS

&

ROTARY REFERENCES

Carolinas' PETS 2016

Rotary Foundation Session Handout & Reference Document #1

Reference: Lead Your Club, 222 EN—(315), Chapter 6

Learning Objectives

At the end of this session, participants will be able to:

- 1. Identify the 6 areas of Rotary Foundation focus and how they relate to Rotary Foundation grants***
- 2. Understand the IMPORTANCE of YOUR leadership role AND how to support and communicate Foundation programs***
- 3. Increase your knowledge about the types of Rotary Foundation grants and understand how clubs can use Foundation grants***
- 4. Lead YOUR club in establishing Foundation support goals***
- 5. Learn about your Foundation's Grant Funding & Management Model***
- 6. How to use Public Awareness to increase Foundation Gifts***
- 7. Identify the "best practices" of successful clubs.***

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Rotary Foundation Session Handout & Reference Document #2

- **YOUR Rotary Foundation has 6 specific Areas of Focus:**

(<https://www.rotary.org/en/learning-reference/about-rotary/areas-focus>)

- ***Promoting Peace***
- ***Fighting Disease***
- ***Providing Clean Water***
- ***Saving Mothers and Children***
- ***Supporting Education***
- ***Growing Local Economies***

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Rotary Foundation Session Handout & Reference Document #3

How will YOU support your club's Foundation Committee?

- ***Meet with the club's Foundation Committee BEFORE and DURING your term of leadership to review current and long-term Foundation goals and their achievement***
- ***Regularly review your club's financial contribution trends in Rotary Club Central***
- ***Attend and encourage attendance at your district Rotary Foundation seminars and other related events***
- ***Help encourage club participation in Foundation giving and programs; lead by personal example and encourage your Board of Directors to also lead by example***
- ***Support Foundation programs that offer opportunities for involvement as well as membership growth and retention***
- ***Promote contributions from club members***
- ***Identify what resources are available to help the club participate in Foundation programs***
- ***Ensure that the club committee is working with the district's Rotary Foundation Committee***

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Rotary Foundation Session Handout & Reference Document #4

What are the benefits of Rotary's Grant Model?

Key Points

- ***The Rotary Foundation's grant model:***
 - ***Simplifies processes***
 - ***Expands service opportunities***
 - ***Builds a stronger sense of ownership among Rotarians for their Foundation***
 - ***Increases the collective impact of grants by concentrating more on the six (6) areas of focus***
 - ***Understand and agree to the club memorandum of understanding (MOU)***
 - ***Ensure that reports on open grants are submitted timely***

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Rotary Foundation Session Handout & Reference Document #5

What are some of YOUR club's "Best Practices" regarding the Rotary Foundation?

Rotary Foundation Club "Best Practices"

- ***Establish/strengthen your club's Rotary Foundation Committee***
- ***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 (e.g., a "Foundation Minute")***
- ***Schedule presentations that inform club members (especially new members) about your Rotary Foundation***
- ***Ensure that your club is well-represented (by YOU and your Foundation Committee Chair and Foundation Committee members at the district Foundation Seminar)***
- ***Seek out ways to use and participate in Rotary Foundation Grants***
- ***Investigate "partnering" opportunities with other clubs***
- ***Recognize (warmly and publicly) club members' financial contributions to TRF and their participation in Foundation programs; make recognitions special! (Example: Invite your Governor to present new Paul Harris Fellow and other recognitions)***
- ***Help club members understand the relationship between Foundation giving and Foundation grants/programs***

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Rotary Foundation Session Handout & Reference Document #6 (Best Practices Grid)

SHARE YOUR BEST PRACTICES

Foundation Focus Areas

Club Foundation Committee

Knowledge of YOUR Foundation

Foundation Programs

District Foundation Seminar

Promoting YOUR Foundation

**Recognizing Club Members
For Their Foundation Support**

Getting Involved In Projects

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Rotary Foundation Session Handout & Reference Document #7

“What other Rotary Foundation resources are available?”

- ***Rotary Foundation resources include:***
 - ***Your District Rotary Foundation chair and committee***
 - ***Your District Rotary Foundation Seminar (PLAN NOW TO GO)***
 - ***Your District Grant Seminar (Plan to send your President-Elect and Foundation Chair-Elect)***
 - ***Your District governor and assistant governors***
 - ***Your Regional Rotary Foundation coordinator***
 - ***Your Rotary Foundation staff at RI World Headquarters***

- ***The following are suggested as informational club resources:***
 - ***www.rotary.org***
 - ***www.rotary.org/myrotary/en/rotary-foundation (become familiar with all links and sub links on this page)***
 - ***E-learning modules***
 - ***Rotary Foundation Basics:***
 - ***<http://learn.rotary.org/Pages/Catalog/CourseCatalog.aspx?subject=40>***
 - ***Rotary 6 Areas of Focus and Choosing a Grant***
 - ***<http://learn.rotary.org/Pages/Catalog/CourseCatalog.aspx?subject=40>***