

Rotary District 7610
The Rotary Foundation District Endowment Fund & Triple Crown Chair
and Subcommittee

Job Description

Purpose:

The Endowment Fund subcommittee is responsible for securing Benefactor commitments, Bequest Society members and soliciting major gifts from those capable individuals to build the Endowment Fund.

Qualifications of Members:

In addition to the minimum recommended qualifications established in the District Leadership Plan and Procedures Manual, professional expertise in fundraising, sales, marketing, public relations, or a financial field is highly recommended.

Chair Duties and Responsibilities:

- ❖ Work with the District Governor and District Rotary Foundation Committee to establish district Benefactor and Bequest Society goals
- ❖ Work with the members of the District Rotary Foundation Committee in determining the distribution of District Designated Funds (DDF)
- ❖ Coordinate subcommittee activities to inform Rotarians of Planned Giving opportunities available in those countries that allow the donor to make a significant gift while receiving estate and/or income tax deductions and under some arrangements, a life income interest as well
- ❖ Coordinate activities of subcommittee members to work with club presidents to recognize current Benefactors and Bequest Society members when programs on the Foundation are scheduled
- ❖ Coordinate promotional and solicitation efforts concerning outright gifts to the Endowment Fund with the Annual Giving subcommittee chair
- ❖ Coordinate the identification, cultivation and solicitation of potential donors of major outright gifts or planning gifts in support of the Foundation's Endowment Fund.

- ❖ Track which Rotarians have earned the District 7610 Triple Crown award (Benefactor AND Paul Harris Fellow AND Sustaining Member), maintain a current listing of those who have earned the award, maintain a quantity of Triple Crown pins, and advise clubs from time to time of this listing."
- ❖ Utilize the Regional Rotary Foundation Coordinator and Assistant Regional Rotary Foundation Coordinators, for support in carrying out subcommittee responsibilities
- ❖ Work with club and district officers to ensure the full utilization of all DDF

Subcommittee Duties and Responsibilities:

Under the guidance of the subcommittee chair:

- ❖ Work with the District Governor and District Rotary Foundation Committee to establish district Benefactor and Bequest Society goals
- ❖ Inform Rotarians of planned giving opportunities available in those countries that allow the donor to make a significant gift while receiving estate and/or income tax deductions
- ❖ Work with club presidents to recognize current Benefactors and Bequest Society members when programs on the Foundation are scheduled
- ❖ Maintain contact with Benefactors and Bequest Society members. Encourage them to be a part of your team to increase financial support
- ❖ Identify, cultivate and solicit potential donors of major outright gifts or planning gifts in support of the Endowment Fund.
- ❖ Thank and continue to nurture relationships with Benefactors and Bequest Society members
- ❖ Encourage clubs to access up-to-date information on the RI Web site (www.rotary.org)
- ❖ Participate in meetings called by the subcommittee chair.