



District 7610

Foundation Chairs & Assistants: 10 Critical Points

District Team Training
April 16, 2016

PDG Chuck Davidson
Zone Assistant Regional Rotary Foundation Coordinator



“10 Critical Points”

1

- **Know your job description.**





Your Job Description

- Specifies who you work for and what you do
- Indicates who you should coordinate with
- Focuses your efforts
- Approved by our district
- Posted on our district website



“10 Critical Points”

2

- **Be aware of Rotary International goals.**



RIPE John Germ



The Rotary Foundation's Centennial

- 100th anniversary of TRF!
- Infused throughout 2016-17 Rotary Year
- Integrated into theme of 2017 Rotary Convention in Atlanta





RI Presidential Citation: Foundation Goals for Clubs

Foundation Giving—do 3 of the following 6:

- Contribute at least \$536
- Contribute at least \$26.50 from each member
- Contribute at least \$2,650 to PolioPlus
- Attain \$100+ per capita to Annual Fund
- Attain 5-year high in Total Giving, + \$26.50 min
- Increase Benefactors/Bequest Scty total by 1



The
Rotary
Foundation



RI Presidential Citation: Foundation Goals for Clubs

Humanitarian Service—do 3 of 7, which include:

- Sponsor a project funded by a Global Grant or District Grant
- Have at least one member attend the grant management seminar
- Implement a project with one of Rotary's service partners



“10 Critical Points”

3

- **Know district priorities.**



DGE George Tyson



District 7610 Priority #1

“Celebrate 100th Anniversary of TRF”

- End polio
- Hold special events
- Increase public and Rotarian Awareness of TRF
- Send at least one member from every club to the 2017 RI Convention in Atlanta
- Increase Foundation giving



“10 Critical Points”

4

- Know district “policies” for Rotary Foundation matters.



DRFC Juanita Cawley



District Foundation “Policies”

- DDF is good; maximize it by emphasizing donations to Annual Fund-SHARE
- Spend as much of available DDF as possible each year
- Maximize clubs that use District Grant; only one project per club
- Work to make grant applications acceptable, rather than disapproving them



District Foundation “Policies”

- Allocate DDF generally only if a club formally participates as well
- District hierarchy should participate if possible in Major Donor, Bequest Society, and Paul Harris Society award presentations
- Donor appreciation functions are free to donors
- Foundation Newsletter publishes only Foundation material



“10 Critical Points”

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S = Specific

M = Measureable

A = Actionable

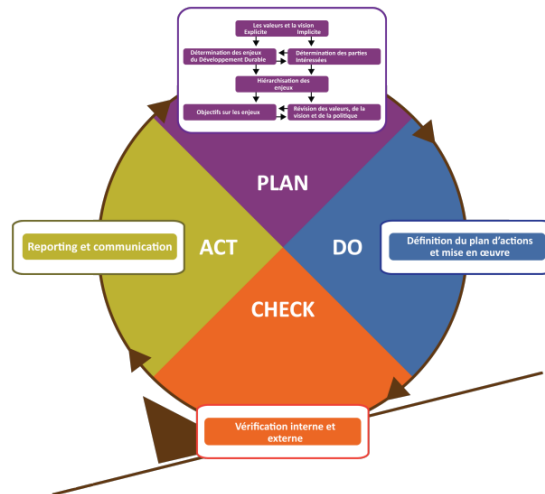
R = Realistic

T = Time-bound

Set personal goals.

“10 Critical Points”

6



- Create an action plan.



Action Plan

- Goal-related
- Breaks objectives into manageable and measurable tasks (actions)
- Sets deadline for each action
- Serves as a “forcing function” on you



“10 Critical Points”

7

- **Be familiar with what other Foundation chairs do.**





Coordination

- Improves your Foundation knowledge
- Enables you to see the “big” picture
- Highlights necessary and/or useful coordination
- Avoids “trespassing” into others’ areas



“10 Critical Points”

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• Mine TRF reports.



ROTARY INTERNATIONAL®
THE ROTARY FOUNDATION®

The Rotary Foundation - Club Recognition Summary as of September 14, 2012

Rotary Club, XX, Canada

District ID:	1234	Paul Harris Fellows:	8	Rotarian Donors:	4	Bequest Society:	0	All-Time Giving:	\$15,890.00
Club ID:	1234	Benefactors:	2	Non-Rotarian Donors:	4	Major Donors:	0	Rotarian Non-Donors:	0

Rotary ID	N A M E	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor
1234	R/C of Rotary Club						Jun-2006 MG	N
239316	Armstrong, Ned	N						N
40136	Carrie, Carl	N	1,100.00	PHF	Nov-1984			N
37795	Cowski, Rich	Y	1,000.00	PHF	Nov-1992		Nov-1992 APF-SHARE	N
708979	Grey, Shawn	N	1,000.00	PHF	Apr-2010			N
111365	Hall, Sal	N						N
87530	Hars, George	Y				110.00		Y



TRF Reports

- Incredible amount of useful information
- All in “Foundation Reports” in My Rotary

DISTRICT-WIDE

Monthly Contribution Report (MCR):

start number; AF goal; AF, endowment, and total giving amounts; AF *per capita*; zero-giving clubs

PolioPlus Report: polio giving amount

Annual Fund Banner Status Report:

status of clubs attaining EREY and 100% Sustaining Member banners

District Fundraising Analysis: 5-year fundraising history; new PHF, MD, BS, and PHS each year

CLUB-WIDE

Club Recognition Summary (CRS):

recognition amount; PHF level; available points; latest donation; Benefactor; # MD, BS, PHF; Rotary-DIRECT; all-time giving; 100% PHF club?

Paul Harris Society Report: PHS by name

EREY Eligibility Report: EREY, Sustaining Member achieved by name this year and last; PHS, Rotary-DIRECT by name

Benefactor Report: Benefactors by name

Club Fundraising Analysis: 5-year history



“10 Critical Points”

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- **Market your role to others.**



Marketing

- Area Foundation Advisor is principal Foundation team contact with clubs
- Advocate to provide club programs
- Develop rapport with selected member(s) in each club you can

“You can’t be a resource to others if they don’t know who you are, what you do, and how you can help them.”



“10 Critical Points”

10



- **Use your resources.**



Your Resources

- DRFC Juanita
- TRF reports
- District Foundation Newsletter
- Contact Center at RI Headquarters
- TRF pubs available on RI website
- District Training Assembly (May 14) and Foundation Seminar (Sep)
- Zone Seminar, Cary NC (June 24-25)



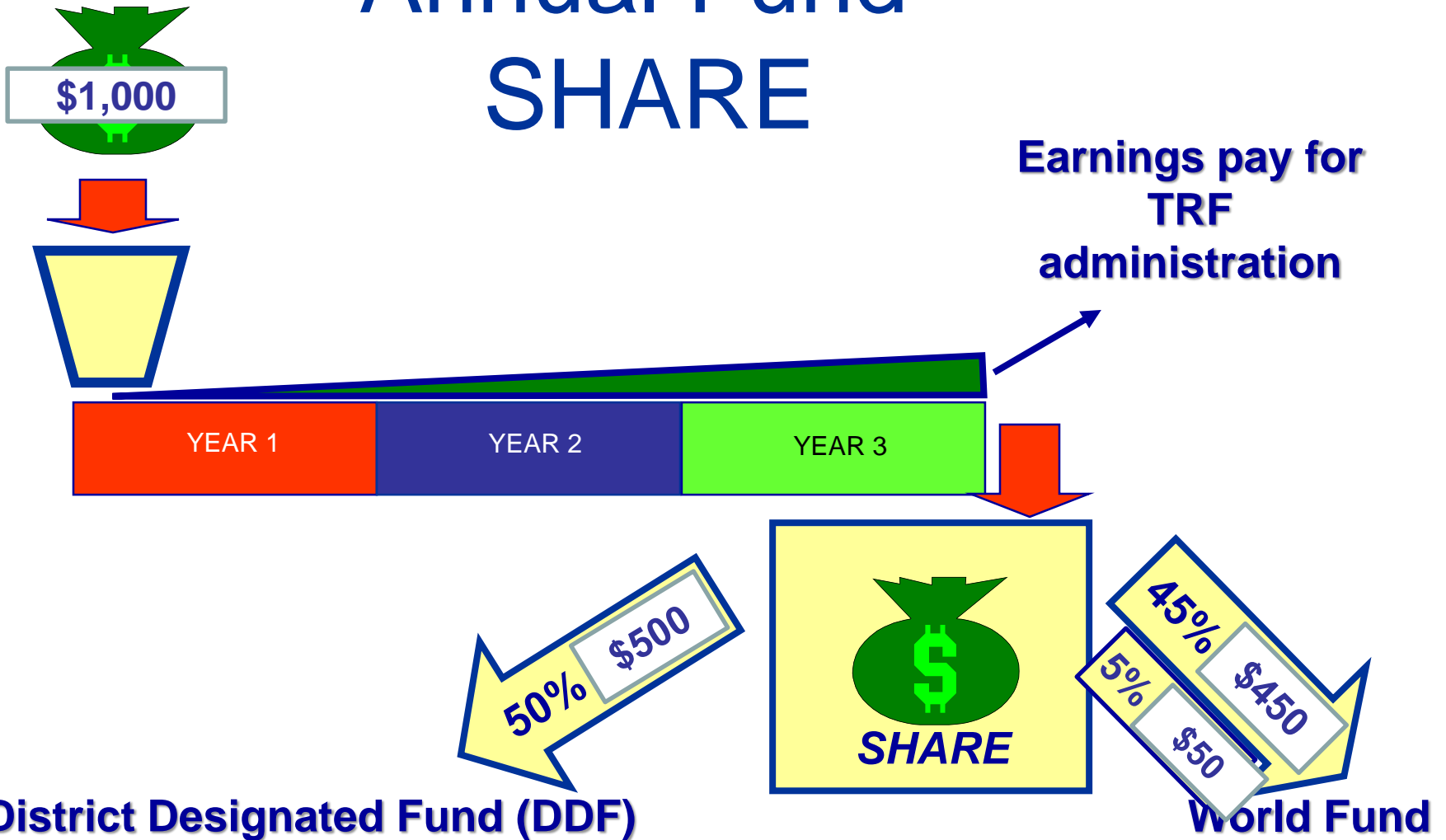
PDG Chuck Davidson

Zone Assistant Regional Rotary Foundation Coordinator

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Annual Fund-SHARE

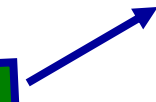
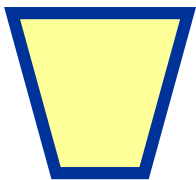




Annual Fund-SHARE

(if earmarks unnecessary)

Earnings pay for TRF administration



District Designated Fund (DDF)

World Fund