



District 7610

“Beyond the Basics”

2015 District Foundation Seminar

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PDG Charles Allen

Assistant Regional Rotary Foundation Coordinators



Understanding Recognition Points



Recognition Points

- **Purpose: Allow one person to give, but another to be recognized for that gift**
- **One point earned for each dollar given**
- **Points can be transferred only once, but there's a way around this restriction**
- **“Recognition Level”**: Can be mixture of your dollars and another's points to you
- **PHF multiple level based on this mixture**
- **Only dollars count toward Major Donor status**



Recognition Points



- **Part of your “Recognition Amount” in CRS column 4**
- **Consists only of points given to you by someone else**
- **Useful to you in achieving PHF multiples (but not Major Donor)**
- **Cannot be re-gifted to another; points can never be transferred (given) a second time**
- **Listed as “Foundation Recognition Pts Available” in CRS column 7**
- **Consists only of points you have earned by cash donations**
- **Useful to you only for giving (transferring) to someone else**
- **So might as well do just that!!**



Documenting Donations



Documenting Donations

- **In case of a dispute, TRF always asks for documentation to make the case**
- **Always take any substantial or June donation inside the Post Office so that you can obtain:**
 - **Dated postal receipt of your mailing from the clerk that shows destination**
- **Always make and keep a copy of your accompanying donation form and check**
- **Keep in mind—95+% of all disputes turn out to be club error**



Multiple Donor Contributions

(Overcoming the Issues)



Multiple Donor Contributions

Option 1

- Use official Form 094
- Writable and savable
- Match names and ID #s to those on CRS
- Only one designation per form
- Be prepared to spend (lots of) time, if filling out for entire club
- Print and mail



094-EN-(1013)

THE ROTARY FOUNDATION MULTIPLE DONOR FORM

Complete this form when submitting a single contribution reflecting the combined gifts of multiple club members. Please do not send cash. Club officers can also make contributions to The Rotary Foundation on behalf of their club or multiple club members at www.rotary.org/give.

Contributions to credit Rotary Club of _____ Club # _____ DISTRICT # _____

1. DESIGNATION/PURPOSE (Check one):

- Annual Fund — SHARE Endowment Fund — World Fund Endowment Fund — Rotary Peace Centers
 PolioPlus Fund Endowment Fund — SHARE Other _____
 Approved Foundation grant _____ (number mandatory)

2. CONTRIBUTION DETAILS

Amount of contribution _____ Currency _____

Credit card contributions can be made at www.rotary.org/give.

Check — Payable to "The Rotary Foundation." Check number _____

Wire transfer Date initiated _____ (Please send completed contribution form as soon as possible after initiating a wire transfer.)

3. INDIVIDUAL DONOR DETAILS (Identify and allocate individual contribution amounts.)

Please provide each individual donor's membership ID, name, and personal contribution amount. Membership ID numbers may be obtained from the club secretary and are also listed on the Club Recognition Summary (CRS).

NOTE: Changes to designation can only be requested within 90 days of gift receipt date within current Rotary year.

Membership ID #	Donor Name (as appears on CRS)	Contribution Amount	Membership ID #	Donor Name (as appears on CRS)	Contribution Amount
1.			11.		
2.			12.		
3.			13.		
4.			14.		
5.			15.		
6.			16.		
7.			17.		
8.			18.		
9.			19.		
10.			20.		
			Total Amount of Contribution		

4. INDIVIDUAL COMPLETING THIS FORM

Name _____ Daytime Phone _____

Email _____ Date _____



Multiple Donor Contributions

Rotary Foundation Transmittal Report

Page 1 of 2

Option 2

- Use DaCdb Report 2.1 in “Reports”
- Click “View” icon, not “Word” or “Excel”
- Names, ID #s automatically populated!
- Fill in default amount; change individual amounts as needed
- Ignore “SUST MEMB” column
- Only one designation per form
- Right click form, print & mail

Rotary District 7610 Club -- Springfield (5835)

[Edit PHF or SM](#)

Enter default AMOUNT/per Rotarian: 100 (Then click or Tab)

Remit TO: **The ROTARY FOUNDATION**
14280 Collections Center Drive
Chicago, IL 60693

MEMBERID	AMT CONTRIB	MEMBER NAME	SUST MEMB
6312274	100.00	Adenwalla, Mohammad M. (Active)	✓
6948556	100.00	Black, Garland C. III(Active)	✓
870777	100.00	Chiles, Wayne D. (Active)	✓
8990334	100.00	Cohn, Robert H. (Active)	✓
687947	50.00	Davidson, Charles Nelson (Active)	✓
1911320	100.00	Goldstone, Carol T. (Active)	✓
8380163	100.00	Harrison, Christopher J. (Active)	✓
9236478	100.00	Hedrick, James B. (Active)	
8787524	100.00	Kasmierski, Daniel J. (Active)	✓
8391589	100.00	Lagerberg, Peter K. (Active)	✓
5955634	100.00	Ledebur, Joan (Active)	✓
9236466	100.00	LeFevre, Stephen F. (Active)	
7053447	100.00	Locke, Priscilla W. (Active)	✓
2128700	100.00	McLeland, Kim A. (Active)	✓
3511856	100.00	McPherson, Charles K. (Active)	✓
9308009	100.00	Moldene, Kyle R. (Active)	✓
1112141	100.00	Ogden, David H. (Active-R85)	✓
8670597	100.00	Sternberg, Philip (Active)	✓
9302982	100.00	Thomas, Margaret F. (Active)	
6600236	100.00	Trumbetic, Victoria Kelley (Active-LOA)	✓
687928	100.00	Ward, George T. (Active-R85)	✓
6637250	100.00	Whittenberg, Susan (Active)	✓
687937	100.00	Wilson, Jackie D (Active)	✓
Club #5835		Contribution By Springfield Club	



New Club Banners

(Overcoming the Roll-Out)

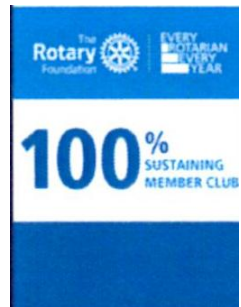


Club Recognition



100% Foundation Giving Club

- 100% Members Give to **any TRF Fund** as of June 30;
- \$100+ **Average**



100% Sustaining Member Club

- 100% Members Give to **Annual Fund** as of June 30;
- \$100+ **Minimum**



100% Paul Harris Society Club

- 100% Members Give to **any TRF Fund except Endowment** as of June 30;
- **\$1,000+** Minimum



Membership Impact

- **“Start” number (July 1 membership)**
 - Never changes during year
 - Used to determine club’s *per capita* giving
- **“End” number (June 30 membership)**
 - TRF makes name-by-name check
 - Used to determine 100% Foundation Giving, 100% Sustaining Member, and 100% PHS clubs (see EREY Eligibility Report for club status)
 - Pitfalls abound! Keep donations current with new members



**Paul Harris Society
= Sustainability**



Sustainability

- **Not just a word associated with grant applications**
- **Only one Foundation award recognizes future giving: Paul Harris Society**
- **“Future” nature of PHS pledges holds promise of sustainability in the giving area**
- **Emphasizing Annual Fund-SHARE for PHS pledges pays dividends for future DDF**
- **Sustainability—equally important for giving**



Posting Club Foundation Goals



Club Foundation Goals

Annual Fund

Giving Level	# Donors	Avg Amount	Total Goal
PHS (\$1000+)			
SMs (\$100+)			
EREY (<\$100)			
Other Contribs			
AF Goal TOTAL			

PolioPlus Fund

PolioPlus Goal (\$\$)	
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Major Gifts & Endowments

# New Major Gifts (\$10K+)	
# New Bequest Soc Mbrs	
# New Benefactors	



On-Line Goal-Posting Tips

- **Don't use symbols—no dollar signs, decimal points, and commas**
- **Don't double count PHS, Sustaining Members and EREY—each individual should be in only one of these three categories**
- **If your final Annual Fund Total Goal is not more than your club's average over last 4 complete years, please reconsider and increase your total by upping “Other”**



Partnering in the Block District Grant



District Grant Partnering

- **Excellent way to leverage a number of small awards into a more substantial total**
- **Lead club responsible for single application, project budget, combined award stewardship, and all reporting**
- **Subordinate partners relinquish their own District Grant “quota” to join; their partnership constitutes their one allowed application**
- **All partners must be “grant-qualified”**



Clarifying the 5% Add-On



New Funding Model

- Became effective 1 July 2015
- Necessary to maintain strong financial base and transparency
- Strategy is to:
 - Ensure sufficient operating funds
 - Build an operating reserve (3 x operating expenses)
 - Distribute surplus to Endowment Fund

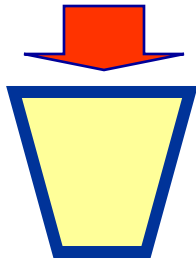


New Funding Model

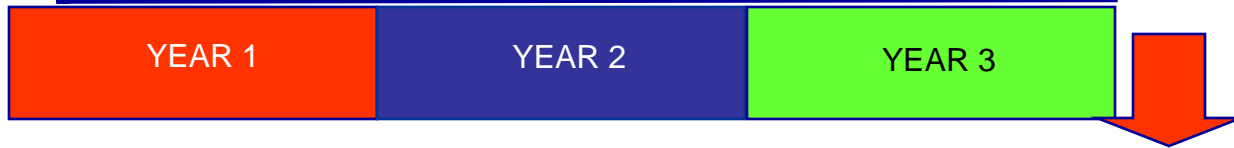
- **Unchanged:** Annual Fund-SHARE gifts invested for 3 years, then split 50-50 between DDF and World Fund
- **Changed:** 5% of total gift (10% of the 50% split to World Fund) is “earmarked” to cover operating fund shortfalls, *if necessary*
 - If this is unnecessary, earmarked funds are then used to build operating reserve, *if necessary*
 - If this is also unnecessary, earmarked funds are released unconditionally into the World Fund, or into Endowment Fund if World Fund has a surplus



Annual Fund-SHARE



Earnings pay for TRF administration



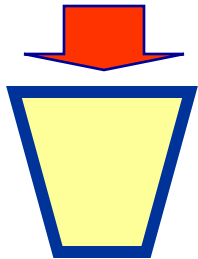
District Designated Fund (DDF)



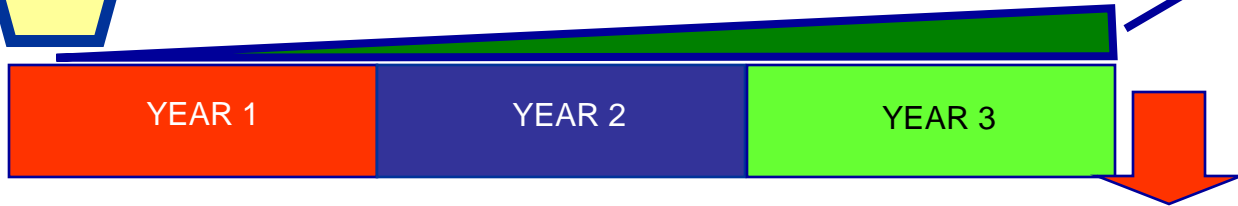
World Fund



Annual Fund-SHARE



Earnings pay for TRF administration



District Designated Fund (DDF)



World Fund



New Funding Model

- **Unchanged:** No earmarking of gifts to PolioPlus and Endowment Funds
- **Changed:** Club and individual cash contributions to approved Global Grants are increased by 5% over budget to cover grant administration costs
- **Changed:** Large corporate gifts will have a negotiated administrative cost not to exceed 10%



Using the "Annual Fund Exchange"

(When Funding Global Grants)



Annual Fund Exchange

- **Technique for funding Global Grants**
- **Most useful when:**
 - Plenty of DDF available
 - Club plans to fund grant at \$5,000+ level
- **Club gives most (not all) of their funding to AF instead of grant (club's total contribution is unchanged)**
- **District compensates by increasing its DDF payment to the grant (the “exchange”), enhancing TRF match**
- **Club signs MOU formalizing a promise that their increased AF contribution will be over and above their current AF goal/planned giving**
- **Results in higher available DDF in future years**