

A hand-operated water pump in a rural village setting. Two women are using the pump. One woman is operating the handle, and the other is pouring water from a bucket into a large basin. The background shows traditional houses and lush vegetation.

Fundraising Strategies The Rotary Foundation and the Annual Fund

YOUR ANNUAL GIVING OFFICER



Tabitha Sparks
Annual Giving Officer
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TABITHA:

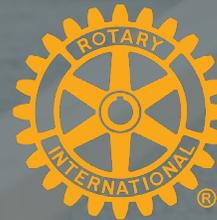
- JOINED THE ROTARY AGO TEAM IN DECEMBER 2019, I SUPPORT THE TEXAS AREA
- 10 YRS OF NONPROFIT FUNDRAISING, VOLUNTEER ENGAGEMENT AND MAJOR DONOR FUNDRAISING EXPERIENCE

ANNUAL FUND:

- IS THE PRIMARY FUND USED TO SUPPORT TRF
- ANNUAL GIVING OFFICERS (6 IN EVANSTON IL) APPLY GIVING TRENDS, DATA ANALYSIS AND CONNECTIONS
 - EMPOWER ROTARY LEADERS TO ACQUIRE, RETAIN, AND UPGRADE DONORS, FUND MORE GRANTS, AND CREATE A STRONG PIPELINE OF PHILANTHROPIC SUPPORT FOR THE ROTARY FOUNDATION

The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.

The
Rotary
Foundation



OUTSTANDING PERFORMANCE

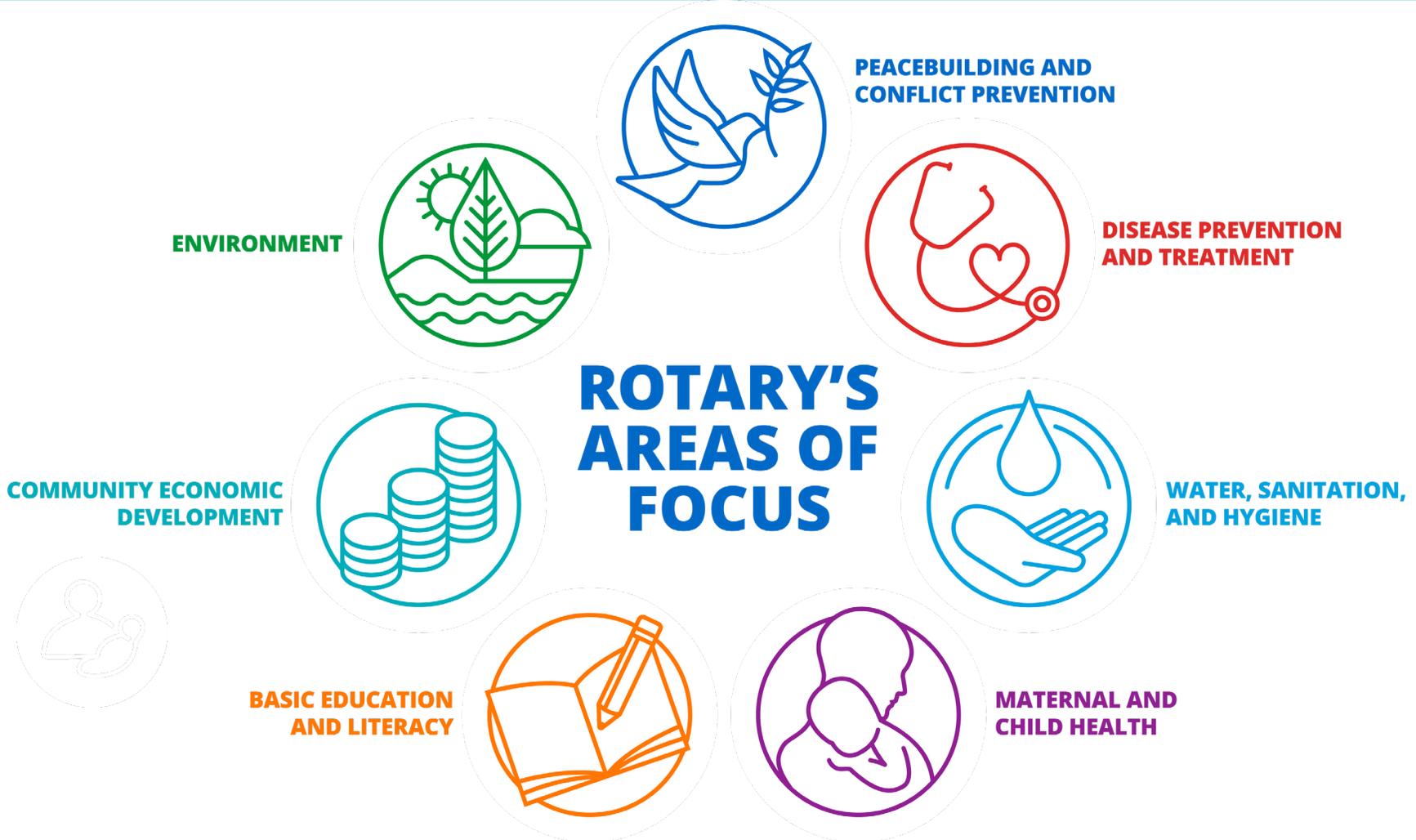
We're an organization you can support with confidence. We've dedicated about 90 percent of our total spending to programs over the past 10 years, far exceeding the efficiency standards set by independent charity-rating services.

91% of funds are spent on program awards and operations

#1 on Charity Navigator's '10 of the Best Charities Everyone's Heard Of'



IMPACT OF OUR ROTARY FOUNDATION (AREA OF FOCUS)



SUPPORTING OUR ROTARY FOUNDATION

Annual Fund

\$123.6M

Endowment

\$39.3M

The Rotary
Foundation

2019-20

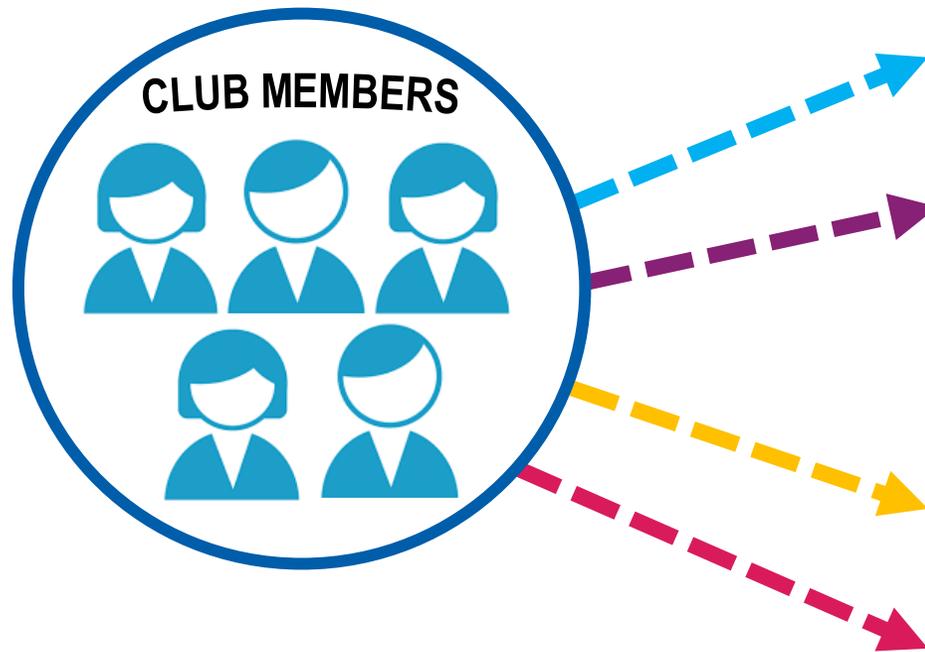
Polio Plus

132.9M

Other Funds

\$43M

THE ROTARY FOUNDATION IMPROVES THE MEMBER EXPERIENCE



DISTRICT GRANT

Help a community



GLOBAL GRANT

Make a bigger impact



THE ANNUAL FUND



ANNUAL FUND – SHARE



Donation to
Annual Fund
SHARE

Donation is invested for
3 years; growth supports
Foundation operations.



SPENDING DECISIONS SHARED

World Fund
(Trustee discretion)



GLOBAL
GRANTS AND
PROGRAMS*

**District
Designated
Funds (DDF)**
(District discretion)



DISTRICT GLOBAL
GRANTS GRANTS

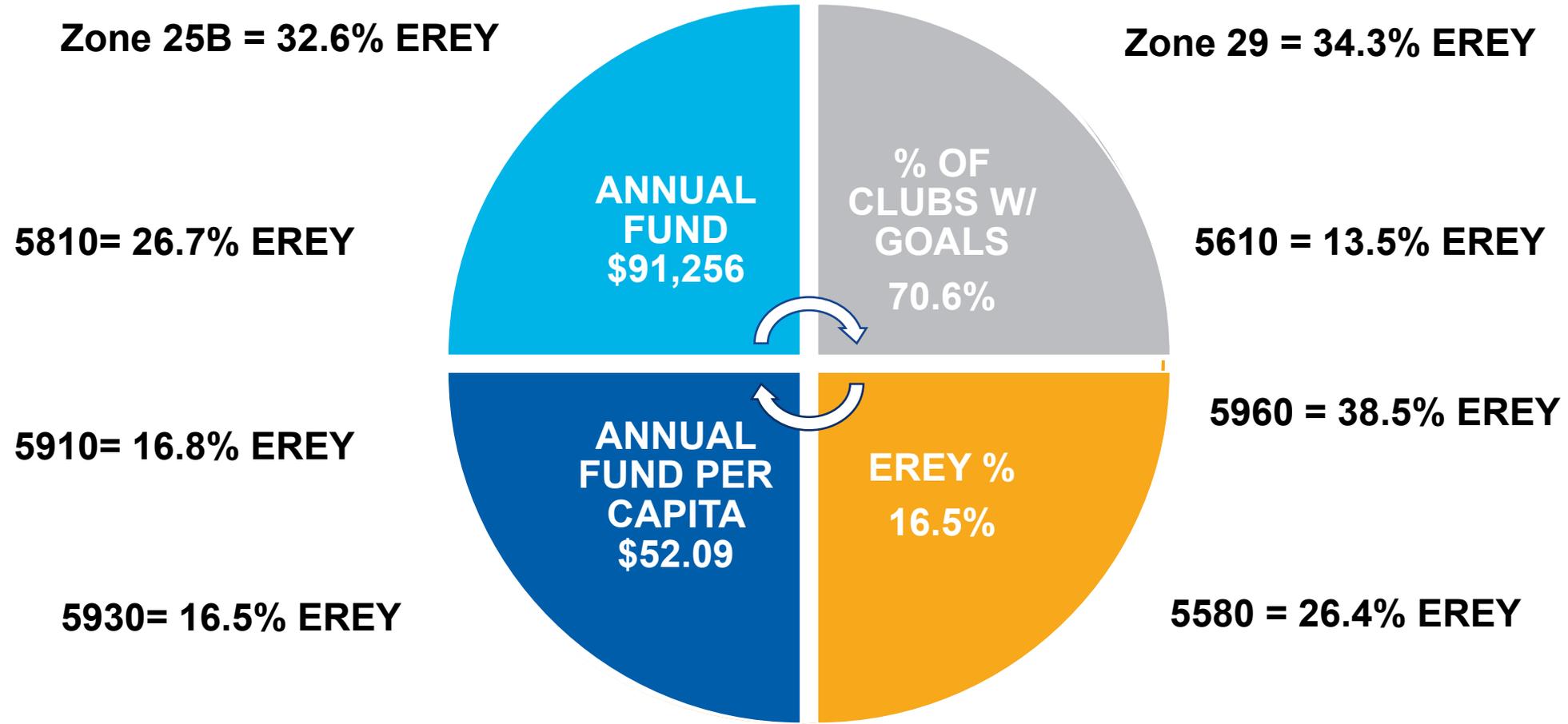
*Includes PolioPlus, Rotary Peace Centers, other districts,
and the Endowment Fund (areas of focus)

YOUR GIFT AT WORK

The Rotary Foundation transforms your gifts into service projects that change lives close to home and around the world.

The Annual Fund is the main funding source for Foundation programs. Your gift empowers Rotarians to carry out sustainable service projects in your community and around the world.

DISTRICT 5930 YEAR-TO-DATE ANNUAL GIVING UPDATE



4 REASONS FOR SETTING GOALS

1. Focus

2. Progress

3. Accountability

4. Motivation

ROTARY CLUB CENTRAL
SETTING YOUR ANNUAL FUND GOAL



1

A screenshot of the Rotary Club Central website. The navigation bar includes: Rotary, My Rotary, Exchange Ideas, Take Action, Learning & Reference, Manage, The Rotary Foundation, and Member News. The 'Take Action' dropdown menu is open, showing four main categories: GIVE (with a 'GIVE NOW' button), DEVELOP PROJECTS, APPLY FOR GRANTS, and EMPOWER LEADERS. A blue callout box points to the 'Rotary Club Central' link under 'DEVELOP PROJECTS'.

Current, immediate past, and incoming club officers can enter goals and achievements for their year.

Go to **Take Action**, select **Rotary Club Central**.

EVERY ROTARIAN, EVERY YEAR

Did you know that donors who gave a gift between \$25 - \$50 contributed over \$5.1 million to the Foundation last year? When every Rotarian gives every year, it makes Doing Good in the World possible through life-changing, sustainable projects.

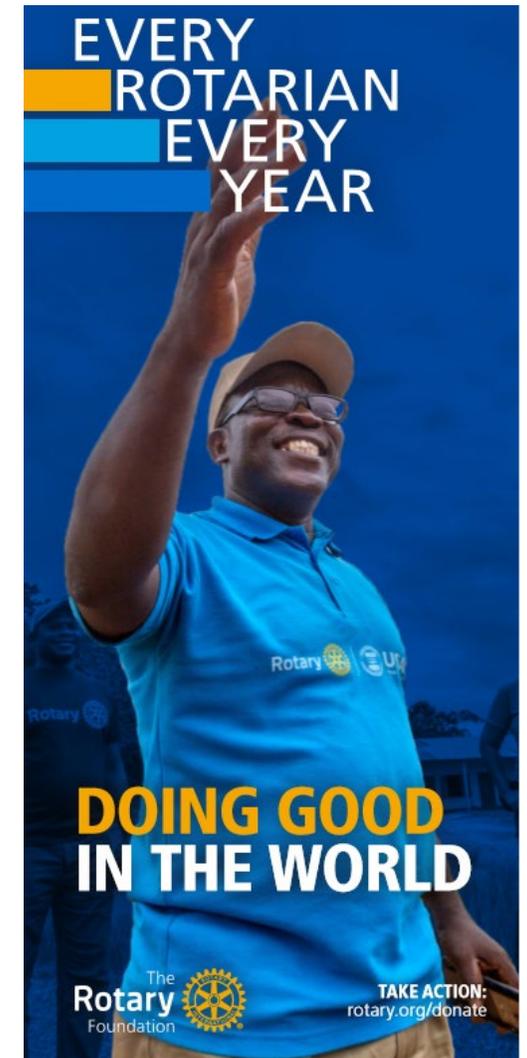
\$123.6 million given to the Annual Fund

1,359 Global Grants awarded

33% of Individual Rotarians supported the Annual Fund

80% of Rotary Clubs worldwide support the Annual Fund

EVERY
ROTARIAN
EVERY
YEAR



SUSTAINING MEMBERS

YOUR GIFT AT WORK

A Rotary Foundation Sustaining Member is a person who contributes US\$100 or more per year to the Annual Fund.



PAUL HARRIS FELLOW

PAUL HARRIS FELLOW RECOGNITION

- Individuals become PHFs when they obtain 1,000 recognition points.

Level +1 - \$2,000 to \$2,999 – 1 sapphire

Level +2 - \$3,000 to \$3,999 – 2 sapphires

Level +3 - \$4,000 to \$4,999 – 3 sapphires

Level +4 - \$5,000 to \$5,999 – 4 sapphires

Level +5 - \$6,000 to \$6,999 – 5 sapphires

Level +6 - \$7,000 to \$7,999 – 1 ruby

Level +7 - \$8,000 to \$8,999 – 2 rubies

Level +8 - \$9,000 to \$9,999 – 3 rubies



PAUL HARRIS SOCIETY

LEADERS IN PHILANTHROPY

- A group of more than 25,000 philanthropic leaders around the world
- PHS members give over 18% of all Annual Fund donations
- Donations fund both local and international projects and earn recognition for donors



JOINING THE PAUL HARRIS SOCIETY

Become a member

- Join online.
(rotary.org/paulharrissociety)
- Complete the brochure
- Call or email the Rotary Support Center
(rotarysupportcenter@rotary.org)
1-866-9ROTARY (976-8279).



CLUB RECOGNITION

The Rotary Foundation
100% FOUNDATION GIVING CLUB

US\$100
AVERAGE GIVING

100%
MEMBER PARTICIPATION

2017-2018

The Rotary Foundation
EVERY ROTARIAN EVERY YEAR CLUB

US\$100
PER CAPITA

100%
MEMBER PARTICIPATION

2017-2018

100%
PAUL HARRIS SOCIETY CLUB

PHS

2015-2016

The Rotary Foundation
100%
PAUL HARRIS FELLOW CLUB

2019-2020

Rotary 

CURRENT STRATEGIES

- **NEW DONOR GRATITUDE**
 - Donor acquisition report
 - Thank new donors by phone, email, or mail
- **RECOGNITION - *Why is it important?***
 - Paul Harris Fellow Report
 - Paul Harris Prospect List
 - Major donor, Arch Klumph society, and Bequest Society report
- **MATCHING POINTS CAMPAIGNS**
 - PHF Prospect List Report
 - Club Recognition Summary
 - District Fundraising Analysis



RECOGNITION POINTS

Club Recognition Summary Report

The Green Bay Packers Rotary Club

100% Paul Harris Fellow Club 2010 - 2011

District:		PHF Bequest Society:	13	Rotarian Donors:	90	Rotary Direct Donors:	10	All-Time Giving:	\$1,329,306
Club:	1234	Benefactors:		Major Donors:	21	Rotarian Non-Donors:	2	Non-Rotarian Donors:	0

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor	Rotary Direct
1234	Green Bay Packers					8,141.52	Dec-2019		
5678	Aaron Rodgers	Y	9,000.00	* PHF+8	Dec-2001	4,416.00	Dec-2019	POLIO PLUS	Y
9101112	Jordan Love	Y	199.20			199.20	Dec-2019	POLIO PLUS	N
12135886	Devin Funchess	Y	660.00			635.00	Dec-2019	POLIO PLUS	Y
16685825	AJ Dillon	Y	100.00			100.00	Dec-2019	POLIO PLUS	N
21235764	Devonte Adams	Y	2,698.00	PHF+1	Jul-2014	1,824.00	Dec-2019	POLIO PLUS	N
25785703	Aaron Jones	Y	9,000.00	* PHF+8	May-2005	6,435.00	Dec-2019	POLIO PLUS	N
30335642	Reggie Begelton	Y	8,385.00	PHF+7	May-2014	8,135.00	Jun-2020	AF-SHARE	Y
34885581	Josiah Deguara	Y	4,245.52	PHF+3	Feb-1997	2,720.52	Dec-2019	POLIO PLUS	Y
39435520	Trevon Hester	Y	3,800.00	PHF+2	May-2005	1,400.00	Dec-2019	POLIO PLUS	N
43985459	Christian Kirksey	Y	9,000.00	* PHF+8	Apr-2008	9,822.00	Dec-2019	POLIO PLUS	N
48535398	Allan Lazard	Y							N
53085337	Kamal Martin	Y	5,245.00	PHF+4	Apr-2008	3,550.00	May-2020	DST-RESPON	N
57635276	Rashan Gary	Y	8,659.00	PHF+7	Oct-2014	7,914.00	Jun-2020	AF-SHARE	Y
62185215	Jaire Alexander	Y	4,928.00	PHF+3	Jun-2011	2,869.00	Dec-2019	POLIO PLUS	N

ANNUAL GIVING STRATEGIES



- **DONORS \$2,000 OR LESS AWAY FROM MAJOR DONOR**
 - Donor summary report
 - DG, DRFC, RRFC, ARRFC, & E/MGA
- **DONORS WHO GAVE LAST YEAR BUT NOT THIS YEAR**
 - Prospect List for Continuing Support
- **PHS MEMBERS AND NON-MEMBERS**
 - PHS Report

SAMPLE LETTERS AND EMAIL CAMPAIGN

Dear XXXX,

Three years ago, during the 2016-17 Rotary year, you made a gift to the Annual Fund-Share. That contribution helped our District 5960 raise \$378,564, which generated \$189,282 in District Designated Funds to be used in 2019-20. As a result, this past year, your gift helped provide **\$1,676,032** to communities in need! We have included a full list of projects to which our District Designated Funds were applied. Your continued generosity and support to the Annual Fund-Share ensures our district can carry on projects that improve the lives of people in our local communities and around the world. Thank you for creating Positive Peace and Doing Good in the World!

Sincerely,



Ed Marok
District Governor, 2020-21



J. Kyle Haugen
District Rotary Foundation Team Leader, 2019-21



New Richmond Rotary:



Arden Hills/Shoreview Rotary:

THREE YEAR THANK YOU CAMPAIGN

A CAMPAIGN DESIGNED TO
STEWARD DONORS WHILE
DEMONSTRATING HOW ANNUAL
FUND - SHARE WORKS

WEEKLY TRF CLUB GUIDE

THE ROTARY FOUNDATION WEEKLY MESSAGES

By Rotarians for Rotarians

WEEK 1

INTRODUCTION

Over the next year, I will be sharing a short weekly message about The Rotary Foundation, its programs and the need for your support. Today, I have a quote from Paulo Costa, Past President of Rotary International, 1990-1991.

“Rotary International’s masterpiece is The Rotary Foundation. It transforms our dreams into splendid realities . . . it is the most generous expression of Rotarian generosity - a generosity that not only brings benefits but also brings help and cooperation to solve the problems that affect mankind. The Rotary Foundation achieves the best that mankind can possibly achieve.”

Thank you for supporting The Rotary Foundation and its work.

WEEK 2

WHAT IS THE ROTARY FOUNDATION?

The Rotary Foundation is the charitable arm of Rotary International. It is a non-profit that is supported solely by voluntary contributions from Rotarians and friends of The Rotary Foundation who share its vision of a better world. Its sole mission is to support the efforts of Rotarians through Rotary’s mission, and the achievement of world understanding and peace through local, national and international humanitarian and educational programs in your back yard and around the globe.

Thank you for supporting The Rotary Foundation and its work.

WEEK 7

WHAT IS A ROTARY FOUNDATION SUSTAINING MEMBER?

A Rotary Foundation Sustaining Member is an individual who personally contributes US\$100 or more each Rotary year to the Annual Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, EREY, Major Donor, and club recognition.

Use the Club Foundation Banner Report to see your club’s Rotary Foundation Sustaining Members.

For \$10 a month, you too can be a Rotary Foundation Sustaining Member and help provide life-changing opportunities for those in need on a yearly basis!

WEEK 12

WHAT IS THE ROTARY FOUNDATION’S ENDOWMENT FUND?

Gifts to Rotary’s Endowment ensure that future Rotarians will have the resources they need to design and implement sustainable projects year after year. Donations to the Endowment Fund can be made as an outright gift or a planned gift, such as a bequest in your estate. As of the 2018-19 Rotary year, Rotary’s Endowment totals US\$374.5 million and has US\$828.9 in commitments.



The Rotary Foundation Weekly Messages (July 2020)

STORY TELLING RESOURCES

STORY RESOURCES



The Rotarian Magazine

View The Rotarian Magazine:

<https://my.rotary.org/en/news-media/magazines/rotarian>



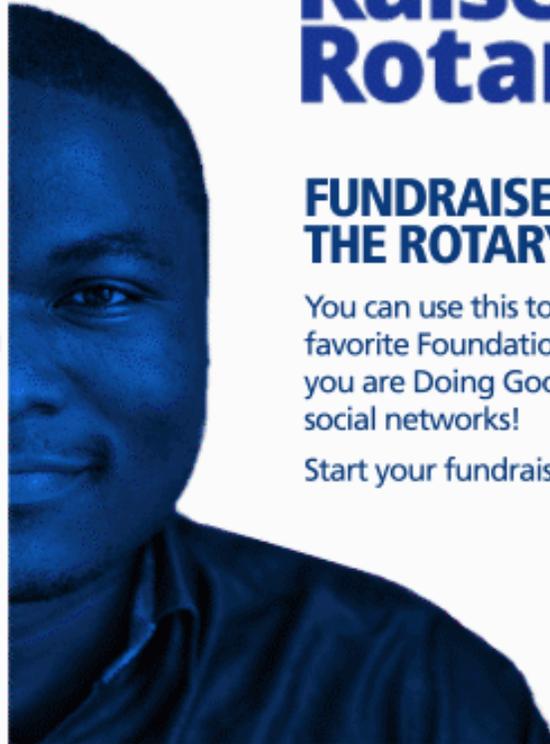
Follow the Rotary Voices blog to see stories from members just like you at <http://blog.rotary.org>



Find Rotary Foundation videos at <https://vimeopro.com/rotary/trf>

RAISE FOR ROTARY

I AM RAISING FOR
**PEACE-
BUILDING
& CONFLICT
PREVENTION**



Raise for
Rotary

**FUNDRAISE FOR
THE ROTARY FOUNDATION**

You can use this tool to fundraise for your favorite Foundation cause and share how you are Doing Good in the World with your social networks!

Start your fundraiser at rotary.org/raise.

The
Rotary
Foundation



ROTARY DIRECT

AVAILABLE IN MY ROTARY

- Rotary Direct is easy, fast, and secure.
- Automated reoccurring giving
- Adjust or cancel your recurring giving anytime by signing into your My Rotary account.
- Visit my.rotary.org/rotary-direct to learn more.



ROTARY DIRECT CURRENCIES

ARS	Argentine Peso
AUD	Australian Dollar
BRL	Brazilian Real
CAD	Canadian Dollar
CHF	Swiss Franc
DKK	Danish Krone
EUR	Euro
GBP	Pound Sterling
JPY	Japanese Yen
NOK	Norwegian Krone
NZD	New Zealand Dollar
SEK	Swedish Krona
USD	United States Dollar
ZAR	South African Rand

WAYS TO GIVE

- Automate your giving through Rotary Direct
- Donate online at rotary.org/donate
- Give a check to your club Foundation chair
- Mail your gift directly to the Foundation
- Memorial or Tribute Gifts
- Grow your impact with a corporate matching gift





IT TAKES A VILLAGE TO ENSURE FOUNDATION SUCCESS

DRFC, PHSC, Annual
Fund Subcommittee
chair, Fundraising
Subcommittee chair,
Grants subcommittee
chair

Learning Center

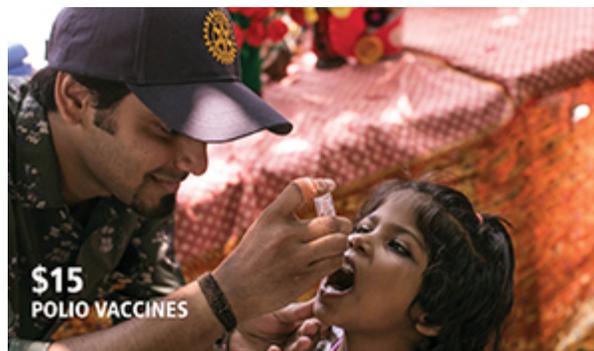
Rotary.org >
My Rotary

Reports

Rotary
Support Center
866-9 Rotary

Annual Giving
Officer

GIFTS OF ANY SIZE HAVE A BIG IMPACT



THE ROTARY FOUNDATION BINGO!

Our club encourages donations to TRF by all members.	Club members know the 6 Areas of focus of TRF.	Club members understand the 3-year funding cycle of the Annual Fund and how it works.	At least one member from our club attends a Grant Management Seminar each year, and our club has a signed MOU.	Our club has been involved in a project funded by a District Grant within the last two years, is planning to be involved in one within the next two years, or both.
Our club encourages members to donate to TRF's Annual Fund.	Our club encourages donations to TRF's Endowment Fund.	Our club encourages donations to TRF for PolioPlus.	Club members understand the importance of Rotary International's involvement in Polio Eradication efforts beyond just making financial contributions.	Club members understand different ways to give to TRF - mailing contributions (snail mail), online at www.myrotary.org , and planned giving.
Our club has at least 1 or 2 presentations at club meetings per Rotary year about programs of TRF - for example, the Peace Scholar Program, presentations about district and global grants, etc.	Members of our club have traveled in support of an international grant.	Our club welcomes Rotarians visiting the area on Rotary Foundation programs by hosting, having them speak at a club meeting, etc.	Our club has a Rotary Foundation Chair.	Our club knows "who to go to" at the district level for resources related to TRF.
A report on TRF giving and doing is given at each meeting of our club's Board.	Our club leaders have a good understanding of the importance of the relationship among TRF, Public Image, and Membership, and of how each affects the other.	Our club enters TRF goals in Rotary Club Central.	Our club enters information in Rotary Showcase.	I've personally made a gift to TRF this Rotary year.
Our club has at least one Paul Harris Society member.	Club members are familiar with Rotary Direct.	Our club has invited beneficiaries of Rotary programs to share their stories.	Our club uses Foundation Recognition Points to encourage giving.	



THANK YOU FOR DOING GOOD IN THE WORLD



QUESTIONS