



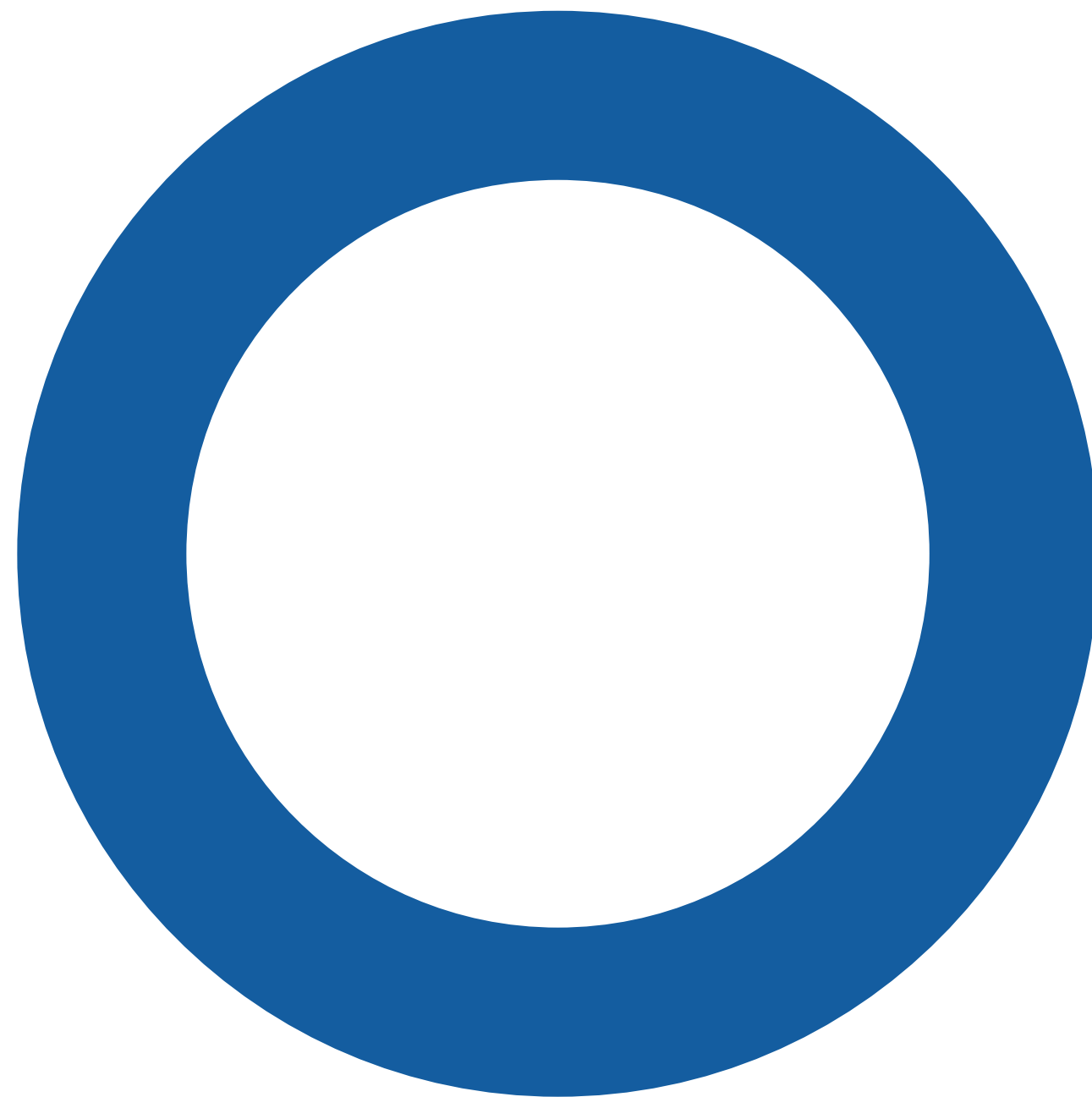
Southwest
PELS



WELCOME

SWPELS-2026

THE ENGINE OF GOOD: THE ROTARY FOUNDATION

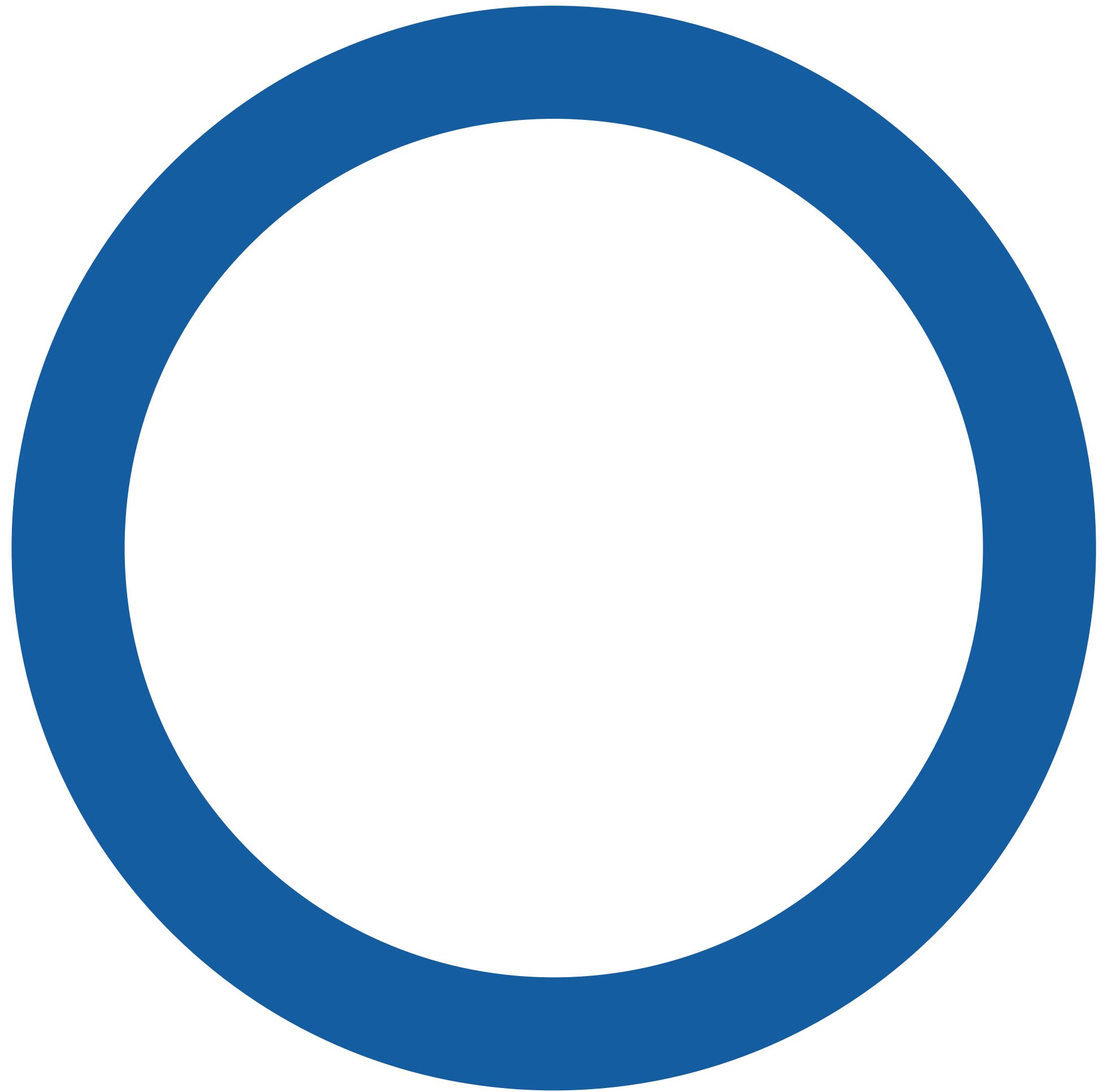



WELCOME

- Our Foundation is the heart and soul of Rotary. It is how we fund our projects, shape the world and create more peace in the world.
- It is Rotarian's soft power. It gives us opportunities to go more places, do more things, and help more people in need than any country or geopolitical area in the world – my words.
- We just want to do good in the world.
- How do we fund this good work?



THE ROTARY FOUNDATION VISION



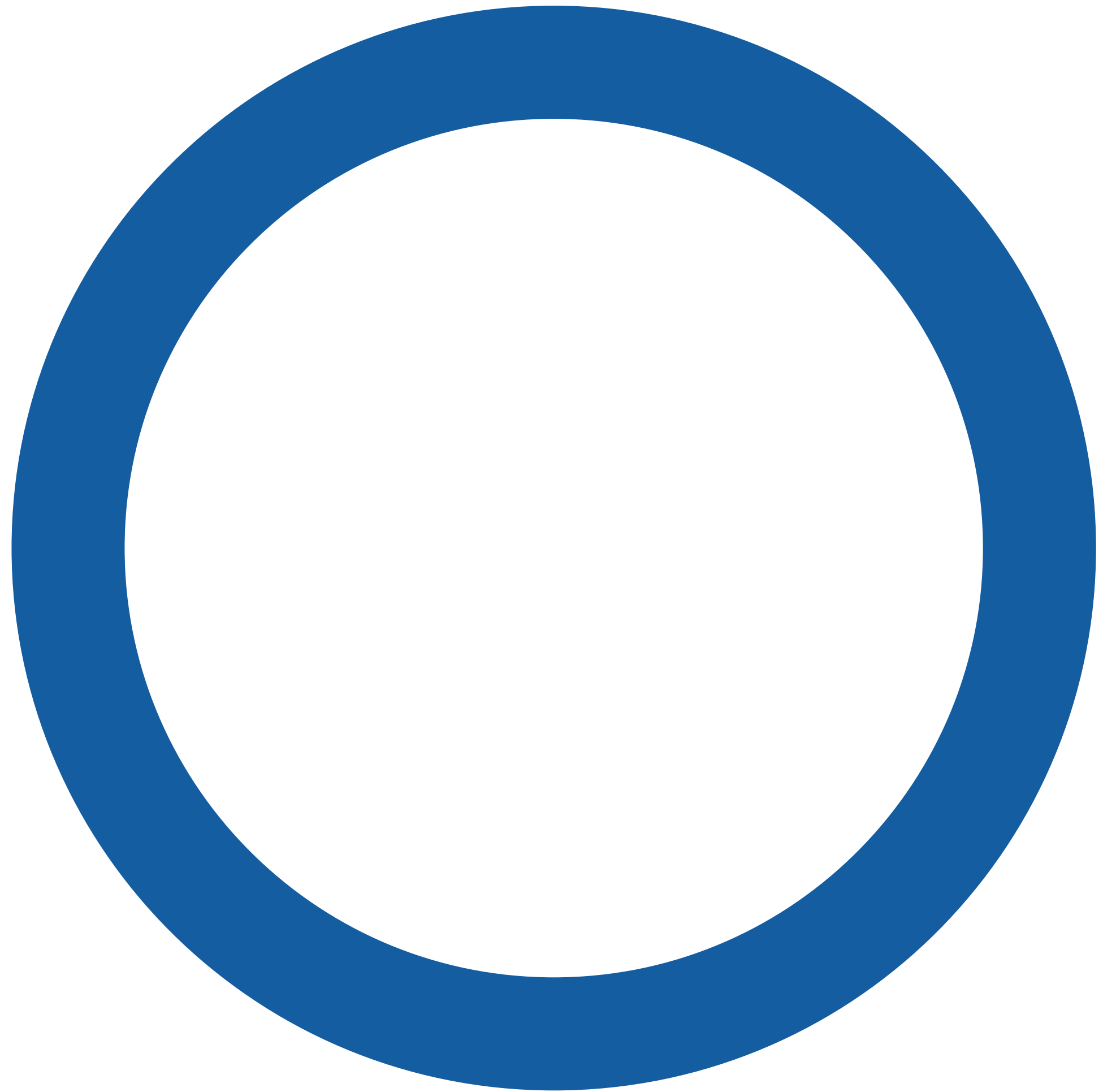


In 1917, Arch Klumph proposed an endowment for the purpose of doing good in the world the first funding was \$26.50, which was left over from the convention.

This has grown into a multi-billion dollar force enabling us to advance world understanding, goodwill and peace through service



THE STRUCTURE



**ROTARY INTERNATIONAL IS
THE MEMBERSHIP ARM**

**THE ROTARY FOUNDATION
IS THE CHARITABLE ARM**



THE ROTARY FOUNDATION

- Managed by Board of Trustees
- Supported by donations, not RI Dues
- Funnel Resources into the 7 Areas of Focus.
- Highest Honors for Stewardship

TRF Only 3 Funds

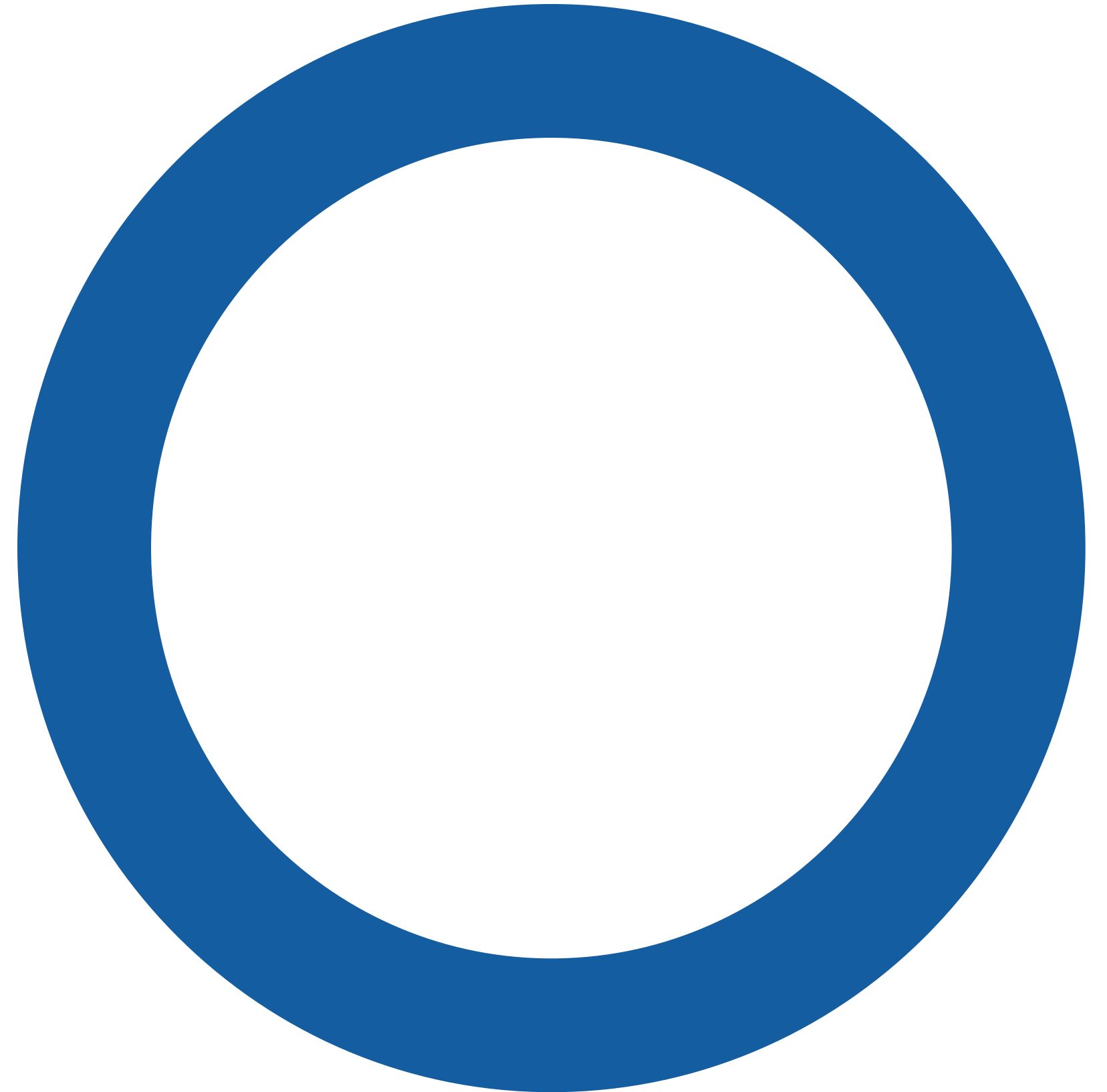
ANNUAL
FUND

POLIOPLUS
FUND

ENDOWMENT
FUND

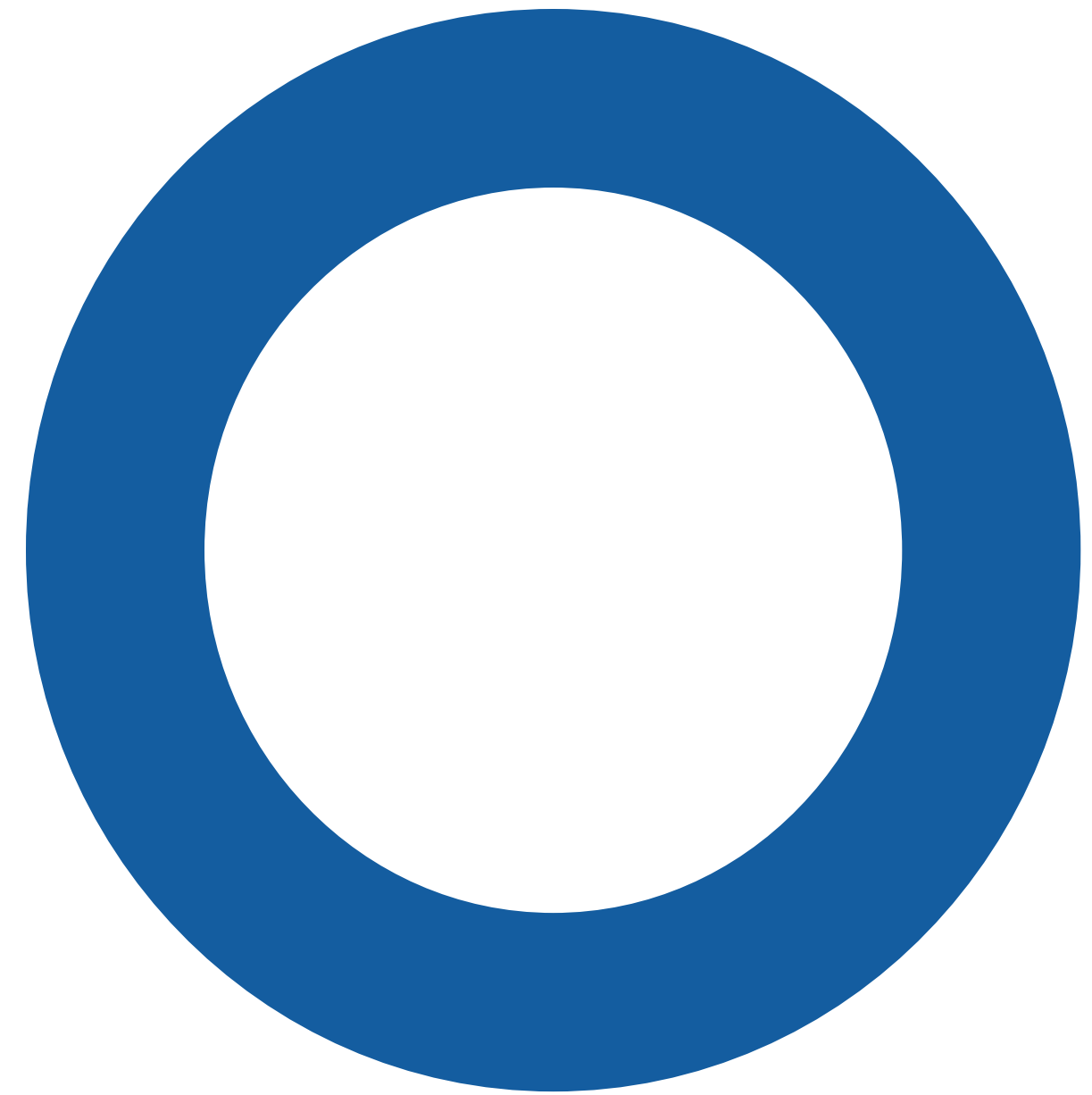
ANNUAL FUND

- Primary source for funding grants and programs
- Acting as the “gasoline” for the projects clubs want to do



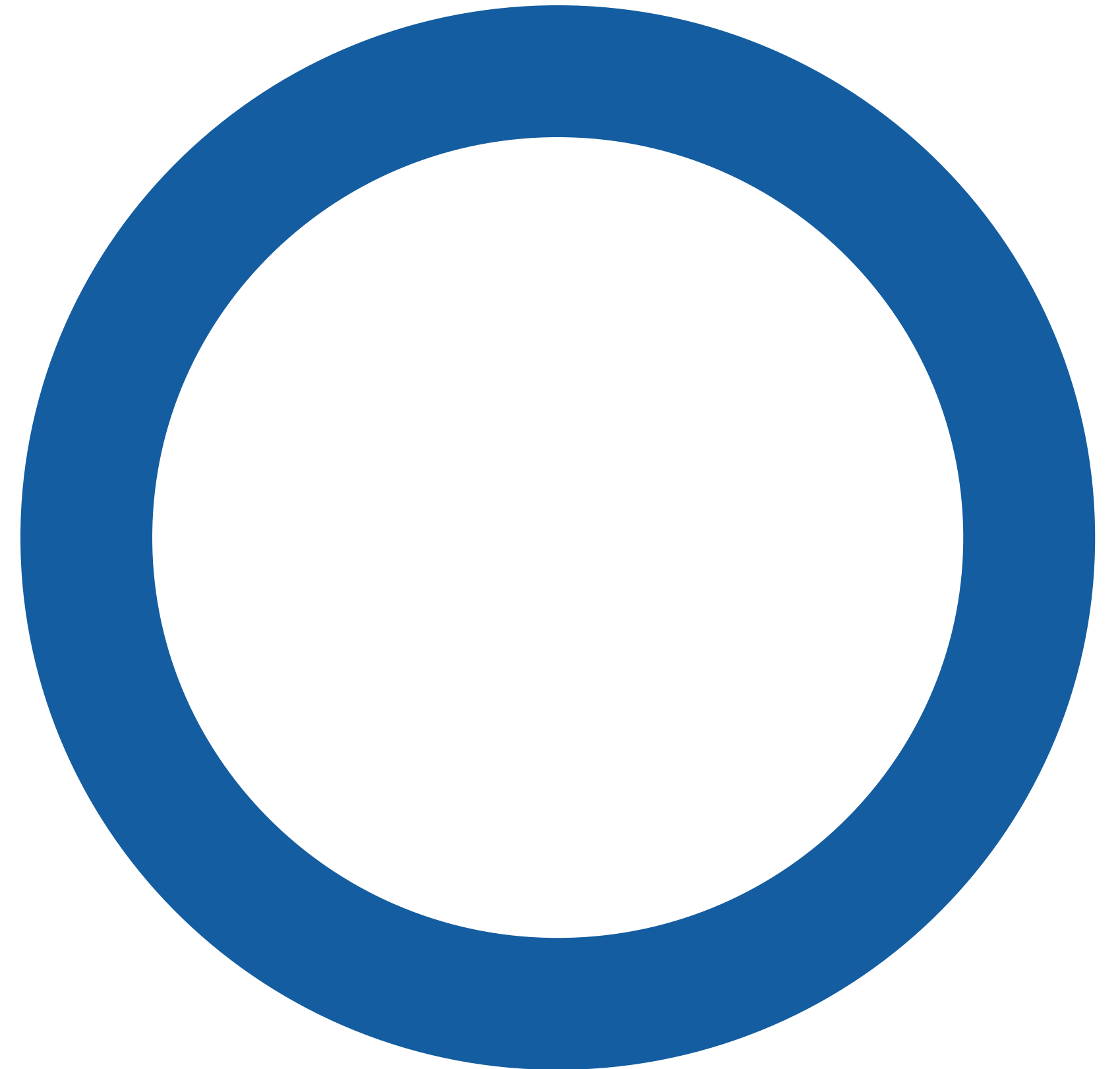
PolioPlus Fund

- Dedicated exclusively to global eradication of polio
- Rotary's top philanthropic priority



ENDOWMENT FUND

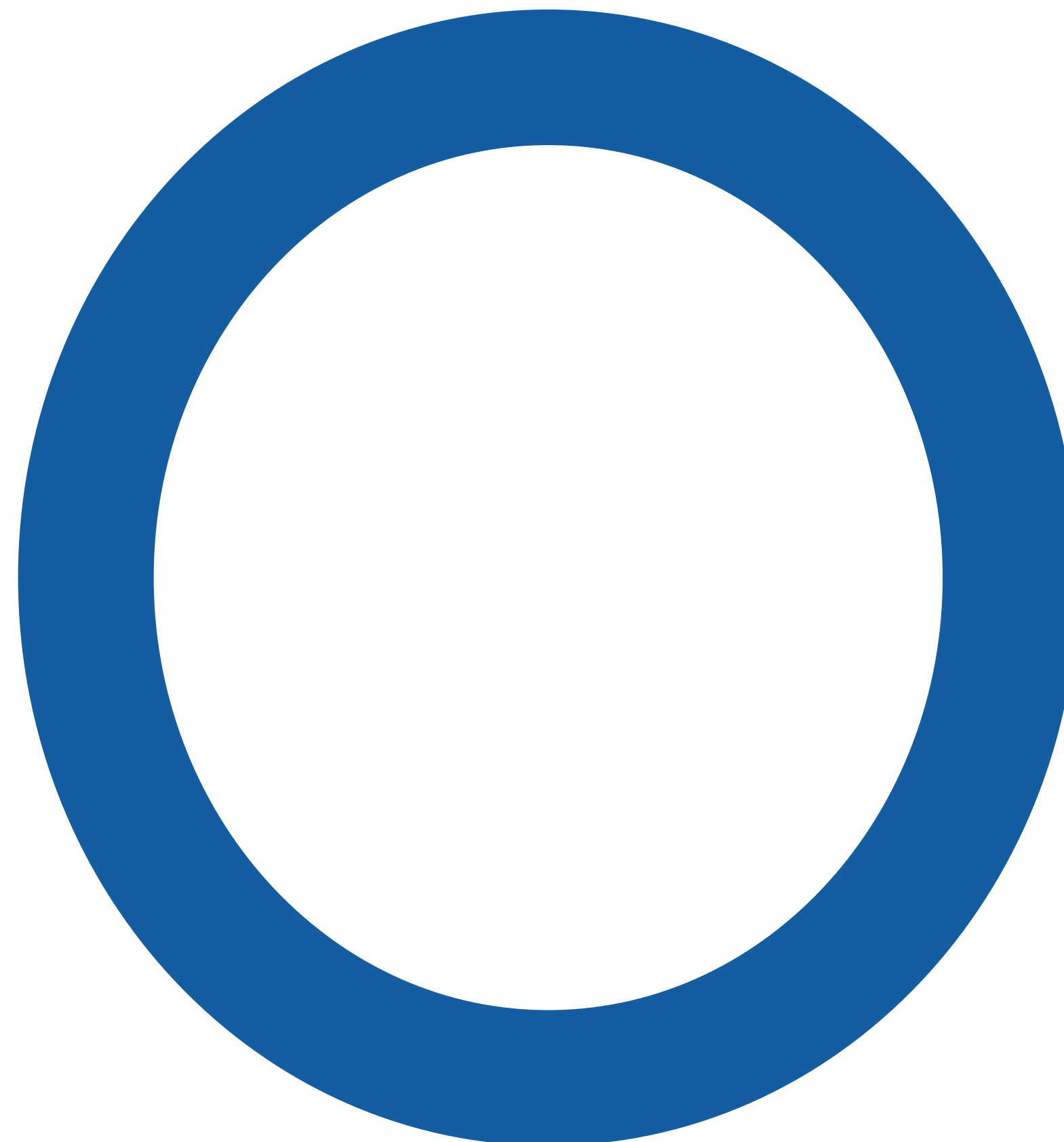
- Ensures the foundation's long-term sustainability
- earnings to support future generations of service





The Synergy

A circular system
known as Share





SHARE

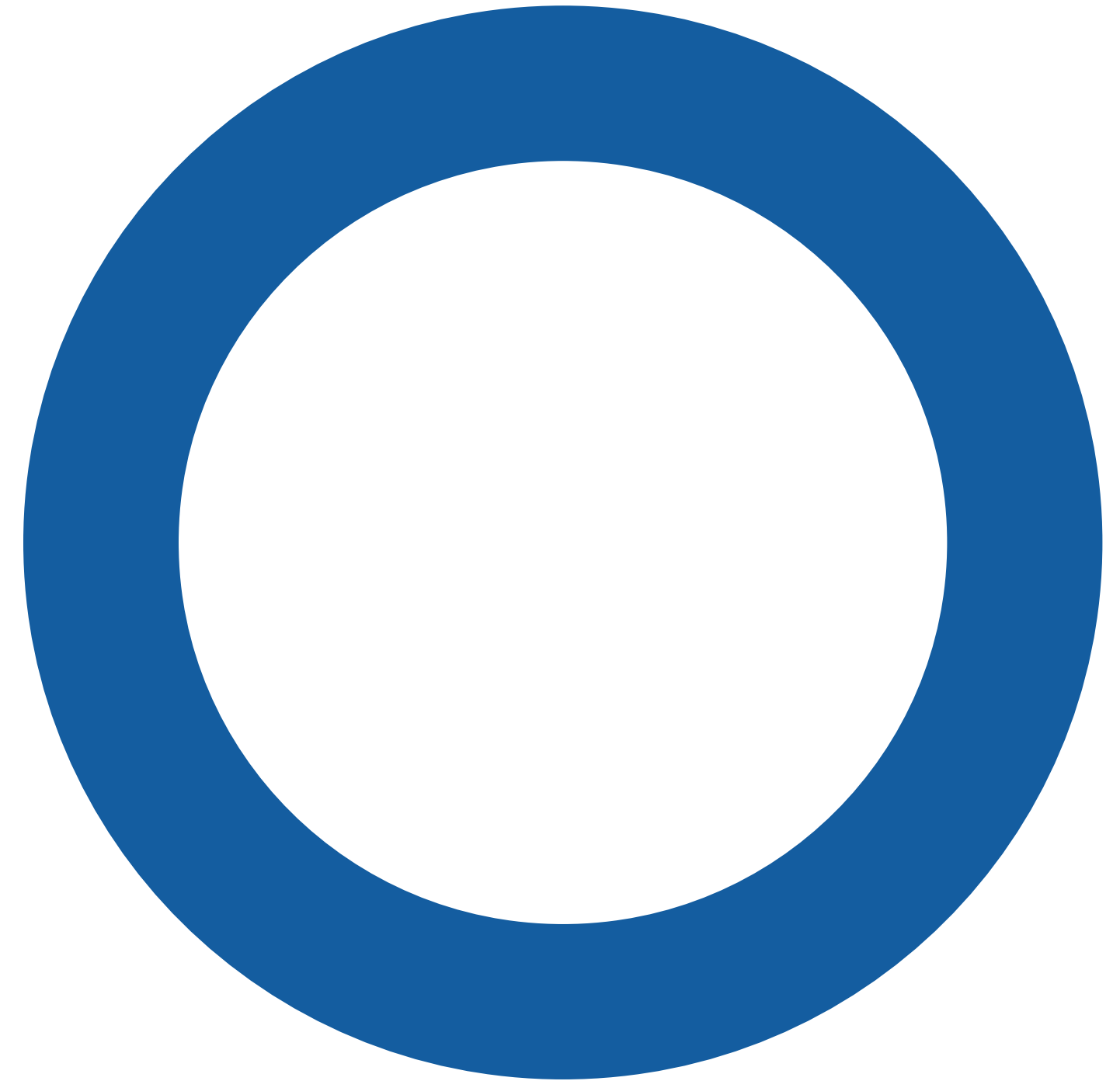
1. Contributions come in
2. TRF invests for 3 years
3. Then returns 50% back to the local District as District Designated Funds (DDF)
4. Impact—Available for Clubs to apply for District Grants (local impact) or Global Grants larger-scale international projects.
5. **EACH DISTRICT CONTROLS HOW THEY USE THEIR DDF**

LEVERAGING OUR GIVING

- MONEY GIVEN TO THE ROTARY FOUNDATIONS
THREE FUNDS
- Fuels LOCAL projects–DDF
- Amplifies Global Impact–80% matching of DDF
- Interest on Endowment Funds come back to the District as additional DDF
- PolioPlus contributions are matched 2 for 1 by The Gates Foundation resulting in 300% to the effort

ALL DONATIONS TO TRF RECEIVES RECOGNITION/POINTS

- No amount is too small nor too large
- Check, credit card, property or investments may be donated
- Rotary Direct makes giving easy





A CLUB FOUNDATION

- Usually used to collect other people's money.
- Not matched by TRF
- You need to have a lot of savings to generate enough interest, for projects.
- You can not leverage as TRF

Breakout Discussion 1



Breakout Discussion 1

- We know that if new members give to TRF 2 times in the first 18 months they will be lifelong givers.
- We know that money can be an issue.
- What could your club do to encourage or assist all members in becoming TRF givers? Or moving to the next level of giving?
- What projects or activities does your club use DDF for? How could you leverage these projects to promote membership? Or more contributions to TRF?



Report Out Breakout Discussion 1





Breakout Discussion 2

Breakout Discussion 2

- We know that people come to Rotary to be part of community and for a sense of purpose. TRF provides lots of opportunities for both.
- How will you use TRF with members, guests and prospective members to promote community and a sense of purpose?
- What is one thing you want others to know about TRF?
- What is one goal you want to accomplish concerning TRF in 26-27?

Report out Breakout Discussion 2





Questions?

TRF TOOLS

- TRF BINGO
- TRF RESOURCES
- FUND VISUAL





Thank you
The End