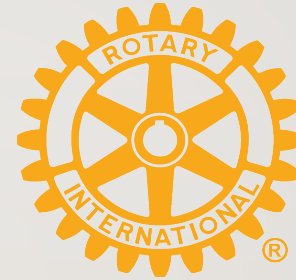


DISTRICT 7620 PRE-PETS 2022

The
Rotary
Foundation



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL

DISTRICT 7620 FOUNDATION LEADERSHIP FOR 2022-2023



**Chair of Trustees
Ian H.S. Riseley
The Rotary
Foundation 2022-2023
PRIP '17 - '18**



**RI PRESIDENT
JENNIFER JONES
2022-2023**



**PDG Rich Glover
District Rotary Foundation Chair
2019-2022**



**DG Dr. Geetha Jayaram
District Rotary
Foundation Chair-Elect
2022-2025**



**Barbara J. Skinner, Esq.
District Foundation
Grants Committee Chair
2021-2024**

WHY IS THE ROTARY FOUNDATION SUCH A BIG DEAL IN THE WORLD?

We are efficient with our money – with over **90%** of the funds raised going to programs.

With over 1 million charities in the US, The Rotary Foundation is also **#1** of the listed charities on [GuideStar](#)

Only **1%** of the charities evaluate by [Charity Navigator](#) have received at least ten consecutive four-star evaluations.

Our efficiency is recognized **14 years** consecutively by [Charity Navigator](#).

[Charity Navigator](#) rates over **9000** charities – approximately **60** receive **4 stars**.

[Chronicle of Philanthropy \(11/21\)](#) rates us **#66** of the worlds **Top 100** largest Public Charities by **Annual** Donations

Recently named **“World’s Outstanding Foundation”** by the [Association of Fundraising Professionals](#) (2020).

THE “FATHER OF THE ROTARY FOUNDATION”

IS BECAUSE **ARCH KLUMPH** HAD THE VISION OF
A ROTARY ENDOWMENT FUND AND THE DEDICATION TO BRING THIS DREAM TO LIFE.



Although Arch believed strongly in the need for the Foundation, he emphasized that all contributions should be voluntary. He did not want Rotarians to view the Foundation as a tax or assessment on clubs or members, which would have violated the association's constitution.

Our job is:

- to **create** a living Legacy of a **GIVING & GRANT CULTURE** in our clubs
- to **inspire** the **SPIRIT** & share the **ART OF GIVING**

IMPACT OF ANNUAL FUND GIVING ENGINE BY EVERY ROTARIAN EVERY YEAR

2020-2021

<u>Categories</u>	<u># Donors</u>
\$25,000 - \$49,999	1
\$10,000 - \$24,999	2
\$ 5,000 - \$ 9,999	3
\$ 2,500 - \$ 2,999	4
\$ 1,000 - \$ 2,499	123
\$ 500 - \$ 999	79
\$ 250 - \$ 999	90
→ \$ 100 - \$ 249 ←	495
\$ 50 - \$ 99	152
\$ 25 - \$ 49	119
\$ 1 - \$ 24	8

Bringing your money back to the district for community and global grants

52% Members gave to Annual Fund

48% 7620 Members did not contribute

46% of Donors to Annual Fund Under \$249 yr
26% of Donors to Annual Fund Under \$100 yr

\$428,574.00



HOW DID YOUR CONTRIBUTION OF \$1.00 IMPACT YOUR PROJECTS?

This tells the story

COMMUNITY GRANTS (31)

- Club Dollars \$111,908
- DDF-Share Match \$111,561
- Donations \$162,501
- **Total Impact \$274,017**

Leveraged = **2.4 x**

GLOBAL GRANTS (43) COUNTRIES (19)

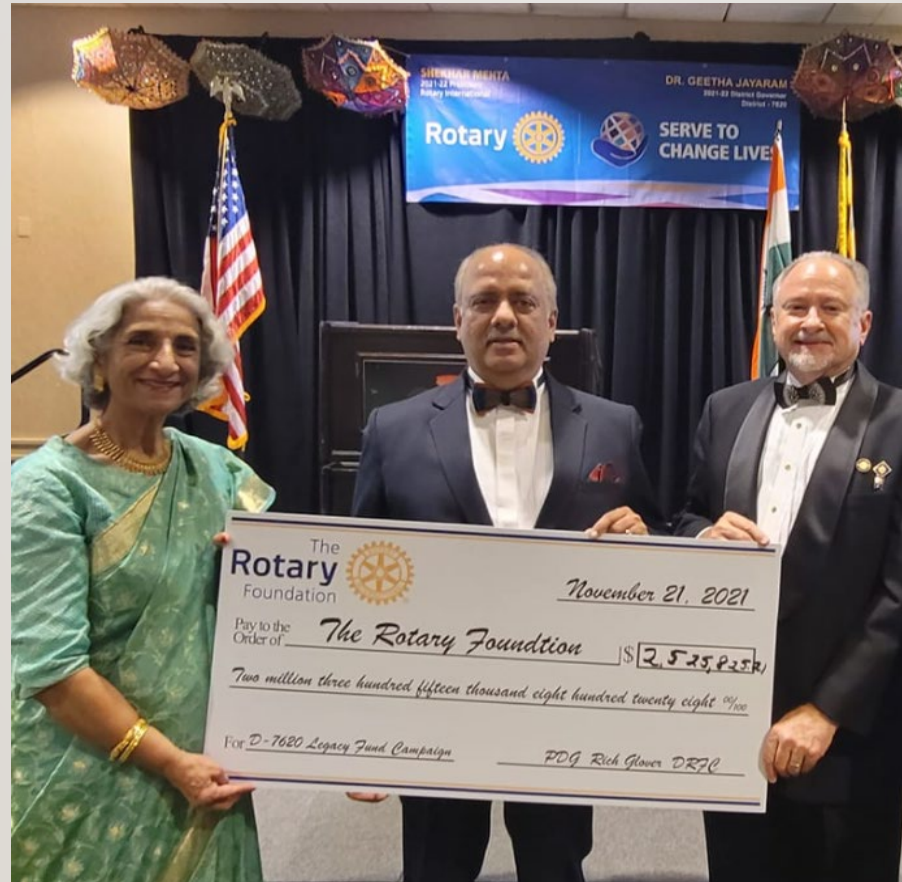
- Club Dollars \$ 125,100
- DDF World Fund Match \$ 123,800
- Donations \$ 315,473
- OUT of District Partnerships \$ 3,827,695
- **Total Impact \$ 4,392,068**

Leveraged = **7.78 x**



LEGACY FUND CAMPAIGN FINAL TOTAL NOVEMBER 21, 2021

(L-R: DG GEETHA JAYARAM, RIP SHEKHAR MEHTA, PDG RICH GLOVER DRFC)



28 District members >\$10,000

District 7620 Central MD & DC Endowment Fund
Frank J. Andracchi & Bernadette L. Carson

Anonymous

Anonymous

George Stewart Brown

William Byrd

Stanley Doore

Daniel Fischer reaches Bequest Society Level 1

Richard B. & Susan L. Glover

Barton & Marina Goldenberg

Bruce D. & Corinne F. Grant

William E. Hammond

John Hanson Re: PDG Robert & Joanne Hanson

Jayaram Kumar and Geetha Jayaram

Amir Y. Kahn

Angelene and Kevin Kenny

David E. Mattingley & Patricia Ann Mattingley

David F. Miller

Clara Montanez

Scott Patano

David Reid

Robert Sartwell & Peggy Kennelley

Anil K. Shah

Dr. Ila Shah

Raymond E. & Phyllis Streib

Alvin Thompson

Brian Torrence

Louise Welch



PRE-PETS LEARNING OBJECTIVES THE ROTARY FOUNDATION (TRF)

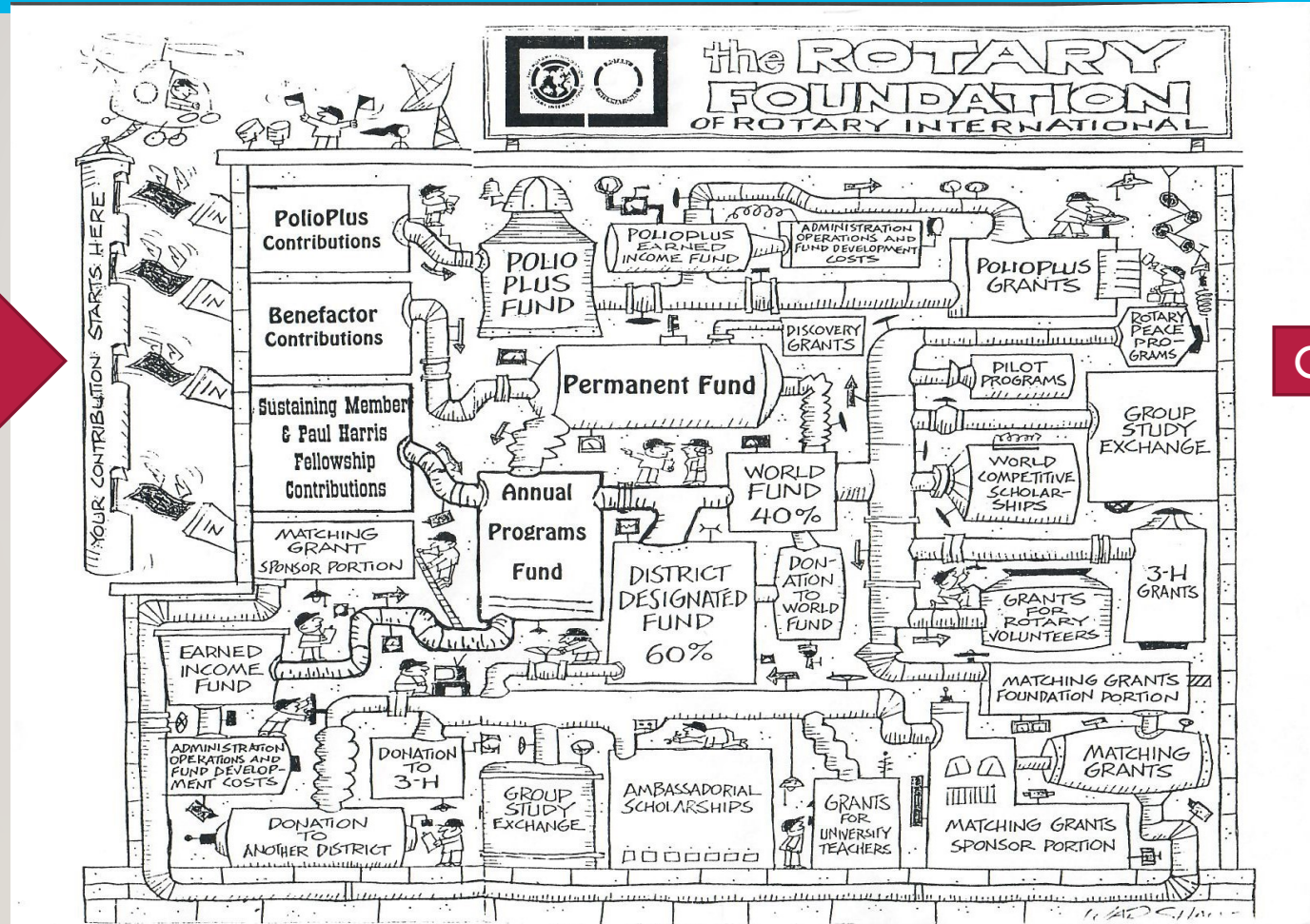
- 1) **"The Mechanics"** District Designated Funds - Share (DDF-Share)
** District and Global Grants and it's **Engine**
- 2) Every Rotarian Every Year (EREY)
- 3) Purpose and Intent of a Memorandum of Understanding (MOU).
- 4) "TOP – 10" eligibility requirements, application modules, and compliance.
- 5) TRF changes.
- 6) TRF Learning Series. We have Evidence-Based Outcomes to prove the impact of the TRF Learning Series
- 7) Presentation(s) link.
- 8) Q&A.

Note: there will be a 5-7 minute break after the first TRF session.



THE FIREHOSE APPROACH OF LEARNING

WE CAN DO BETTER THAN THIS! →



Join the District DRFC Zoom Rotary Foundation Learning Series – “Building Blocks one @ a time”



This is



SO WE SET SOME POWERFUL OBJECTIVES BASED ON 3 YEARS OF EVIDENCE BASED PRACTICE

- ✓ Establish standard benchmarks in your foundation education
- ✓ Review the many options in the art of giving to The Rotary Foundation
- ✓ Inspiring an ongoing legacy of a giving and grant culture through engagement
 - ✓ Expand partnerships in all grants to leverage impact
 - ✓ Club Leaders need to support the DRFC recipe message.

July 01, 2022 – June 30, 2025



REVISED SCHEDULE: EIGHT-PART 2022 TRF LEARNING SERIES

EVERY THURSDAY & SATURDAY
BEGINNING **FEBRUARY 10, 2022**

ALL DISTRICT MEMBERS ARE WELCOME.



MANDATORY FOR MOU #II, III, IV FOR PRESIDENT-ELECT, CLUB TRF CHAIR



Part II - Learning the Mechanics of The Rotary Foundation; Learn how the TRF works and why it is the "Engine" that drives our districts giving

- Thursday, February 10 @ 7:00 – 8:00 pm, *and*
- Saturday, February 12 @ 9:00 – 10:00 am



Part III – Be Prepared to Apply for District Grants; Learn about the Memorandum of Understanding (MOU) for community and global grants eligibility, where do we apply, easy steps of the application, and how do we get funded.

- Thursday, February 17 @ 7:00 – 8:00 pm, *and*
- Saturday, February 19 @ 9:00 – 10:00 am



Part IV – Be Prepared to Apply for Global Grants; Learn about the where and how do we apply, easy steps of the application tips, and how do we get funded.

- Thursday, February 24 @ 7:00 – 8:00 pm, *and*
- Saturday, February 26 @ 9:00 – 10:00 am

Part I – Learn the 105 years History of The Rotary Foundation;

Learn about the humble beginnings in 1917 to today as one of the most highly respected foundations in the world.

- Thursday, March 10 @ 7:00 – 8:00 pm *and*
- Saturday, March 12 @ 9:00 – 10:00 am

Part V - Paul Harris Fellow vs. Paul Harris Society; "Why is the Difference so Significant?"

- Thursday, March 17 @ 7:00 – 8:00 pm, *and*
- Saturday, March 19 @ 9:00 – 10:00 am

Part VI - PolioPlus; "We are that close" to eradication of Polio in the world. And what is the "Plus"?

- Thursday, March 24 @ 7:00 – 8:00 pm, *and*
- Saturday, March 26 @ 9:00 – 10:00 am

Part VII - Your Legacy; Rotary's Promise; Learn the many ways to establish your own legacy in support of The Rotary Foundation

- Thursday, March 31 @ 7:00 – 8:00 pm, *and*
- Saturday, April 02 @ 9:00 – 10:00 am

Part VIII - Other Programs - **Make-ups, specific topic, club presentations and special requests (Dates to be determined):**

Encourage requested presentations – Contact PDG Rich Glover, DRFC at 18.19.dg7620@glovercrew.net to schedule.



IS THE ROTARY FOUNDATION TAX DEDUCTIBLE ?

YES 501(C)3



IS ROTARY INTERNATIONAL TAX DEDUCTIBLE ?

NO 501(C)4

These terms are often used interchangeably, but they all mean different things. Nonprofit means the entity, usually a **corporation**, is organized for a nonprofit purpose. 501(c)(3) means a nonprofit organization that has been recognized by the IRS as being tax-exempt by virtue of its charitable programs. Jun 17, 2021

What is the exact difference between a 501(c)(3) and 501(c)(4)? As per IRS, 501(c)3 is a nonprofit organization for religious, charitable, scientific, and educational purposes. ... Whereas on the other hand, **501(c)4 is a social welfare group, and donations to 501(c)4 are not tax-deductible.** Apr 12, 2021

Statement to post per IRS Notice 88-120: <https://www.irs.gov/charities-non-profits/notice-88-120-1988-2-cb-454>

Contributions or gifts to Rotary District 7620 are not tax deductible as charitable contributions.

It must be:

1. The statement is in at least the same size type as the primary message stated in the body of the letter, leaflet or ad;
2. The statement is either the first sentence in a paragraph or itself constitutes a paragraph.

=====

Contributions or gifts to The Rotary Foundation **is tax deductible as a charitable contribution.**





LET US TALK MECHANICS

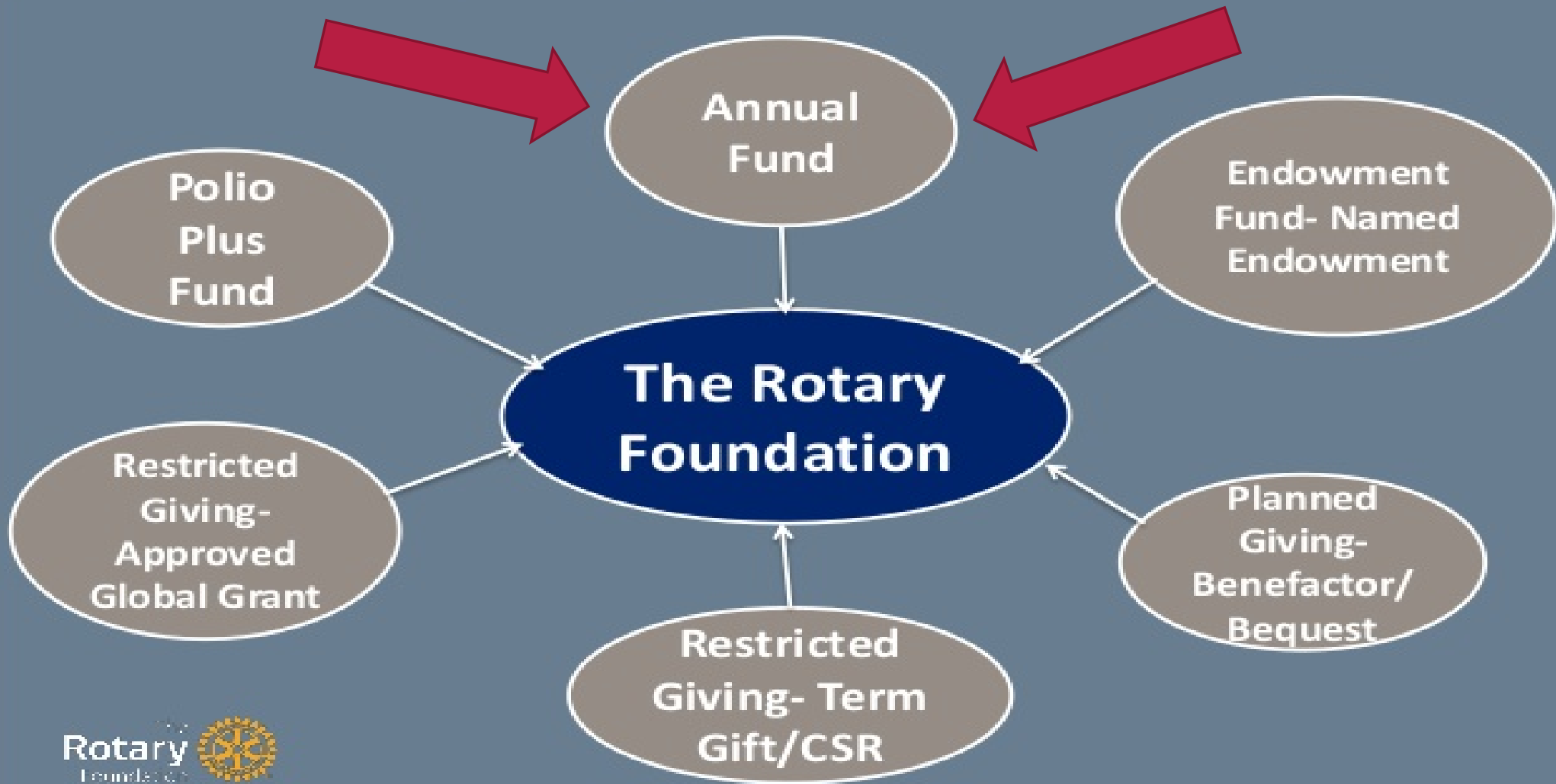
HOW WINNERS WIN



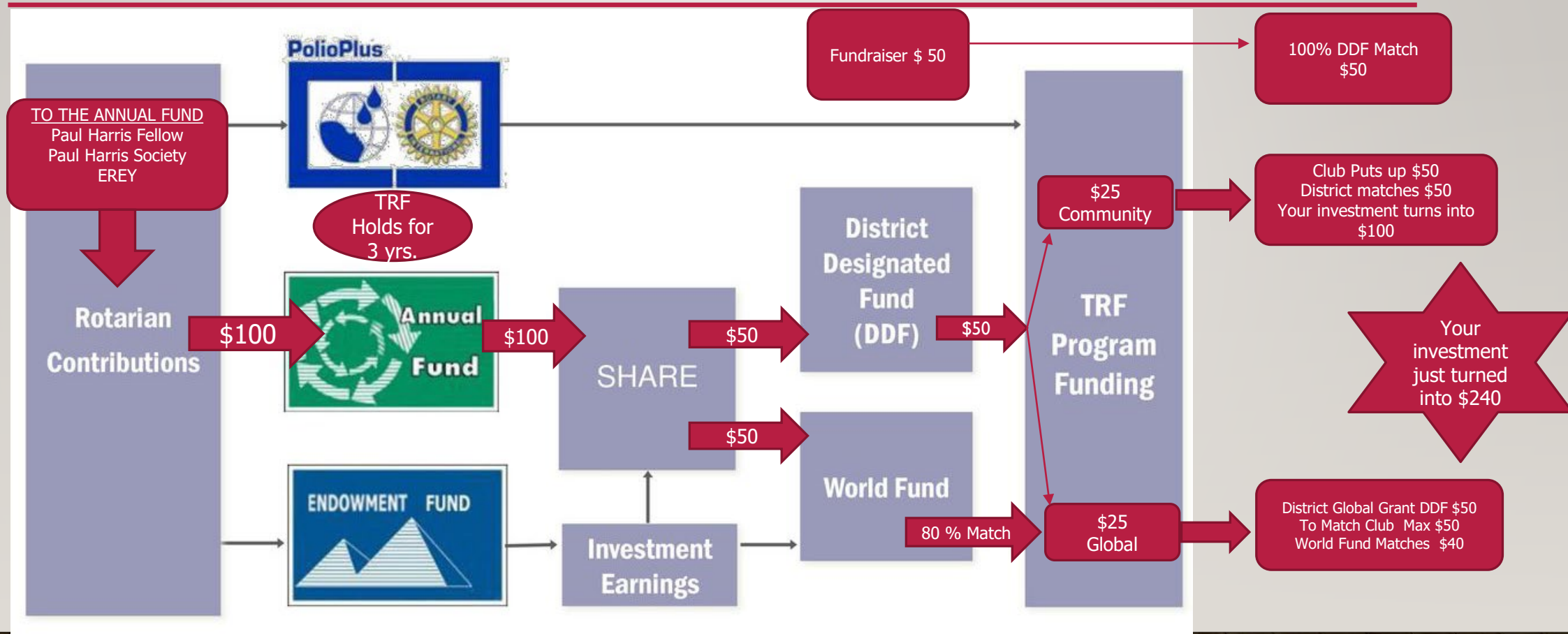
- ✓ Rotarians get into the game
- ✓ Rotarians learn the rules
- ✓ Rotarians play as they practice
- ✓ Rotarians understand their sphere of influence in the world
- ✓ Rotarians pursue the awesome experience
- ✓ Rotarians are People of Action



Ways to Support The Foundation



THE ANNUAL FUND IS THE **ENGINE** THAT DRIVES OUR DISTRICT GRANT GIVING



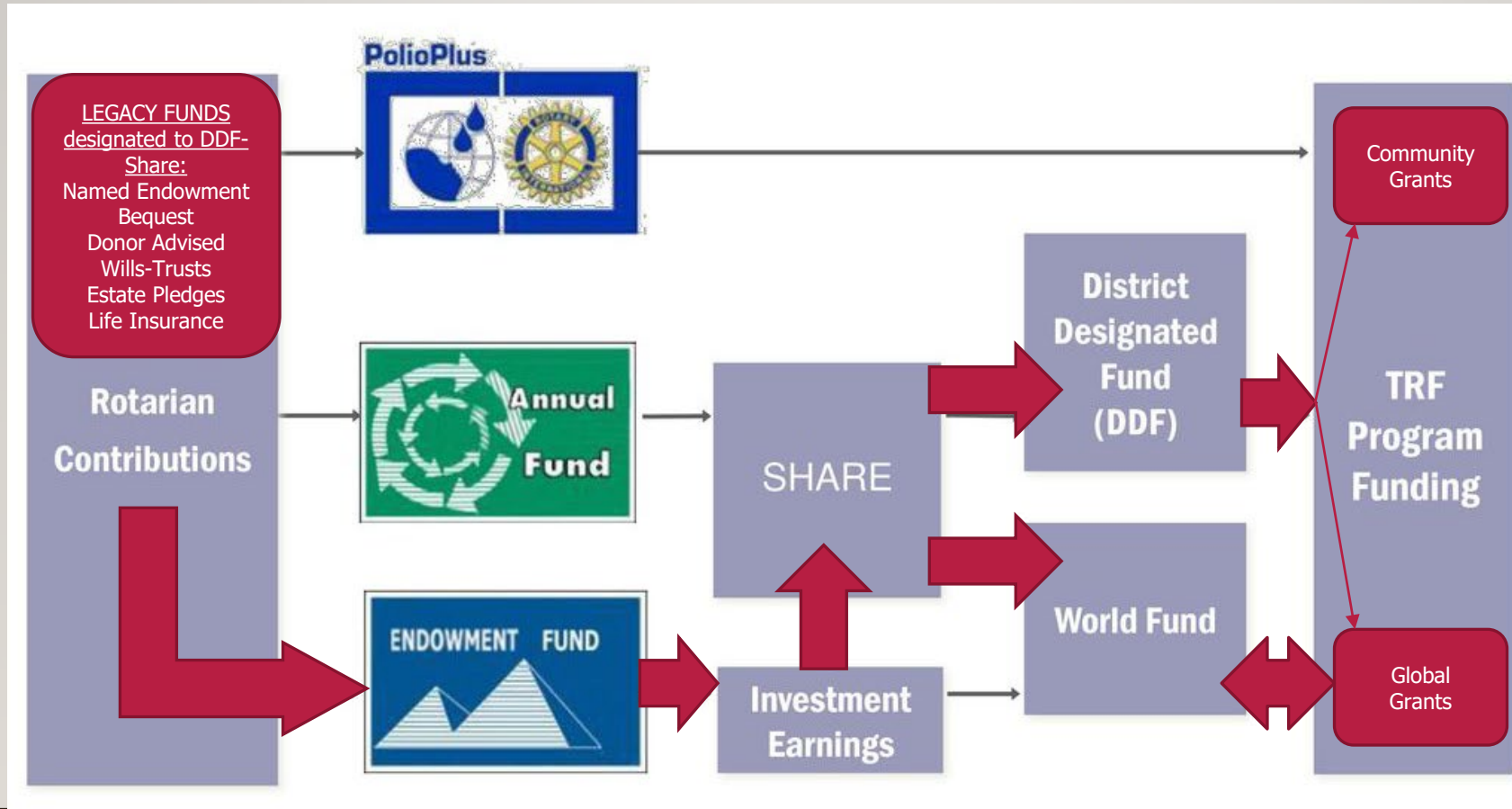
EVERY ROTARIAN MAY CONTRIBUTE TO THE DISTRICTS NAMED ENDOWMENT FUND

District 7620 Named Endowment Funds		Annual Spendable Earnings that come back for grants		
Donor	Name of Fund	Restriction	Gift Value*	Market Value*
TRF Privacy Policy		World Fund	\$3,115,047.92	\$5,343,570.97
TRF Privacy Policy		World Fund	\$109,280.56	\$123,702.33
TRF Privacy Policy		Rotary Peace Fellowships	\$250,010.12	\$332,679.07
TRF Privacy Policy		SHARE	\$240,000.00	\$271,009.10
District 7620	District 7620 Central MD & DC Endowment Fund	SHARE	\$175,000.00	\$175,000.00
TRF Privacy Policy		SHARE	\$30,000.00	\$65,464.08

Below please find a breakdown of the District Designated Funds (DDF) available to your district from Endowment Fund – SHARE spendable earnings:

Name of Fund	Spendable earnings budgeted as DDF in 2021 - 2022 **
District 7620 District 7620 Central MD & DC Endowment Fund	Begins returns in December 2022
TRF Privacy Policy	US \$1,115.67
TRF Privacy Policy	US \$4,618.68
Spendable earnings from Endowment Fund-SHARE contributions not in endowed funds	US \$2,512.74
TOTAL of Annual Spendable Earnings That Come Back for DDF-Share Grants	US \$8,247.08

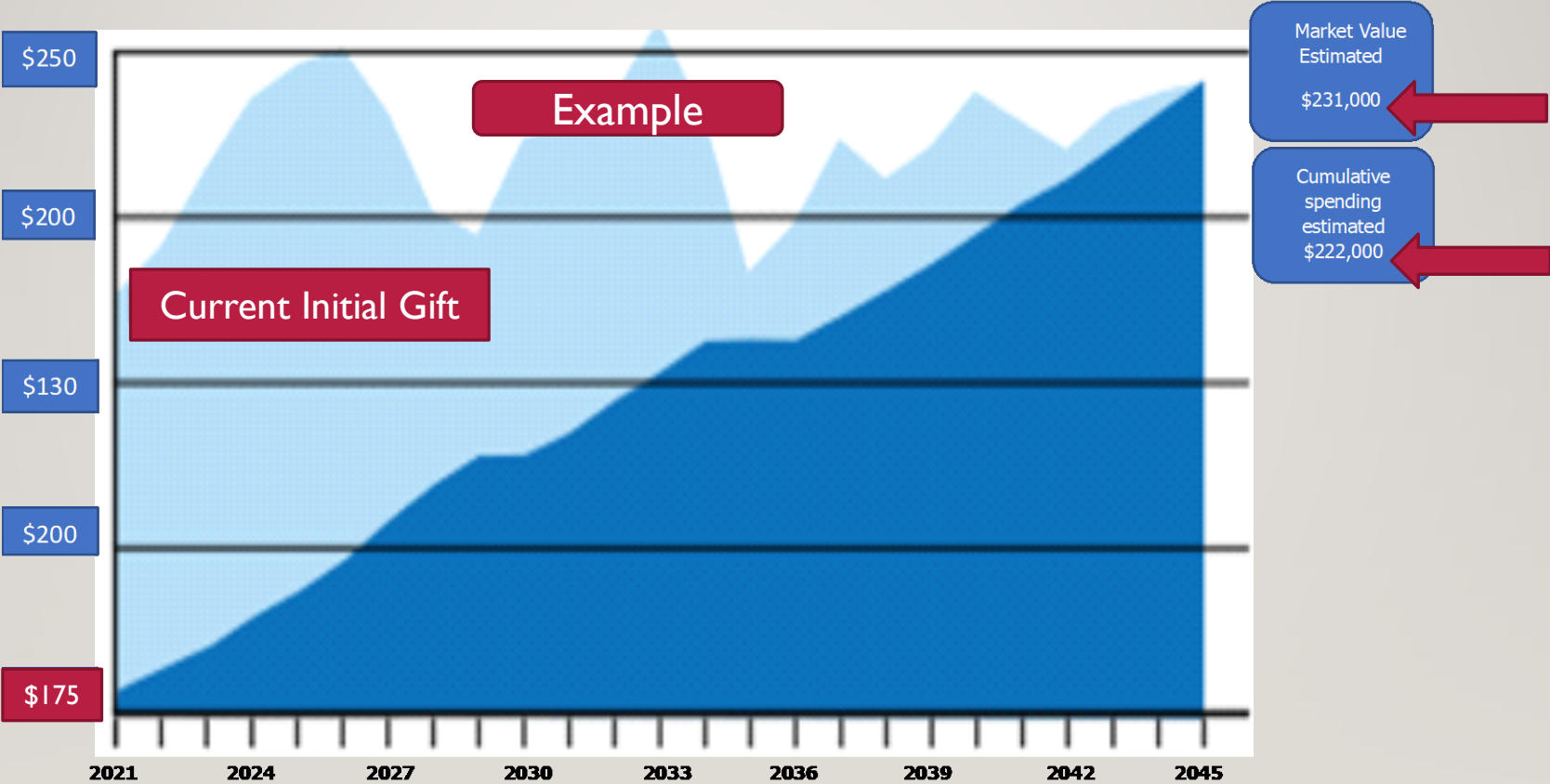
HOW DO YOU LEVERAGE YOUR LEGACY TO THE ANNUAL FUND



District 7620 Central MD & DC Endowment Fund

Gift ID: E12224

The District 7620 Central MD & DC Endowment Fund of \$150,000 was established on January 21, 2021. This fund will provide spendable earnings every year to District 7620 DDF-Share Funds forever. The original gift amount is never spent, and the fair market of the fund traditionally grows over the years based on investment market trends. As the original fund gift amount increases in market value, so do the spendable earnings. The graph below is based on past growth trends to demonstrate how the Endowment Fund may grow in both market value and spendable earnings over the next 25 years. Therefore, your money continues to give and grow over time forever.



HOW DONOR RECOGNITION WORKS WITH THE ROTARY FOUNDATION

Clubs with (501 © 3) foundations have expressed moving their foundations to TRF

Rotarian gives gifts (\$\$) directly to)

The Rotary Foundation (501 © 3)



Rotarian receives Major Donor/AKS recognition

Donor gives gifts (\$\$) directly to a

Rotary Club Foundation (501 © 3).

Then Rotary Club gives to The Rotary Foundation.



Rotary Club receives Club Recognition

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 rotary.org/donate.

Data privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data shared with Rotary will only be used for official Rotary business to support Rotary's core business purposes. Personal data collected on this form is subject to Rotary's Privacy Policy found at my.rotary.org/en/privacy-policy.

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

1. DESIGNATION/PURPOSE (Check one):

- | | | |
|---|---|--|
| <input type="checkbox"/> Annual Fund — SHARE | <input type="checkbox"/> Annual Fund — World Fund | <input type="checkbox"/> PolioPlus |
| <input type="checkbox"/> Disaster Response | <input type="checkbox"/> Water, Sanitation, and Hygiene | <input type="checkbox"/> Maternal and Child Health |
| <input type="checkbox"/> Basic Education and Literacy | <input type="checkbox"/> Community Economic Development | <input type="checkbox"/> Environment |
| <input type="checkbox"/> Endowment - _____ | <input type="checkbox"/> Global Grant # _____ | <input type="checkbox"/> Other _____ |

2. CONTRIBUTION DETAILS

Amount of contribution _____ Currency _____

Credit card contributions can be made at rotary.org/donate.

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 60 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			

D-7620 Recognition Report of Foundation Points August 012021

Club Pts.	Members Pts.	RC of	TOTAL Pts.
3,499.00	38,654.00	Aberdeen	42,153.00
19,538.65	104,925.78	Annapolis	124,464.43
12,010.00	32,909.50	Baltimore	44,919.50
10.00	1,240.00	Baltimore Sunset	1,250.00
9,570.00	8,953.00	Bel Air	18,523.00
38,970.49	69,501.36	Bethesda Chevy Chase	108,471.85
19,822.30	11,066.50	Bonds Meadows	30,888.80
1,870.00	1,925.00	BWI Airport	3,795.00
2,488.00	59,338.45	Capitol Hill	61,826.45
37,657.50	380,607.93	Carroll Creek	418,265.43
6,332.50	30,773.00	Catonsville	37,105.50
1,235.00	54,912.00	Charles Co. (LaPlata)	56,147.00
114,849.00	350,431.45	Charlotte Hall	465,280.45
17,087.35	71,486.97	College Park	88,574.32
13,971.00	67,023.94	Columbia	80,994.94
11,184.16	122,436.36	Columbia Patuxent	133,620.52
3,202.14	15,326.03	Columbia Town Center	18,528.17
675.00	13,315.00	Downtown Silver Spring	13,990.00
6,614.07	18,634.00	DuPont Circle	25,248.07
6,275.00	20,855.00	E-Club of Maryland	27,130.00
15,167.00	32,313.81	Elkridge	47,480.81
11,163.09	68,499.07	Ellicott City	79,662.16
2,874.00	7,805.28	Ellicott City Sunrise	10,679.28
19,562.51	256,803.63	Frederick	276,366.14
4,223.88	51,897.25	Fredericktown	56,121.13
11,134.00	23,984.50	Gaithersburg	35,118.50
4,849.85	36,184.53	Glen Bernie	41,034.38
5,045.00	8,451.15	Greenbelt	13,496.15

17,773.25	49,432.27
7,295.00	14,746.66
0.00	6,941.61
1,148.00	43,269.52
165.80	0
839.38	39,509.75
21,257.87	92,067.90
53,659.00	130,826.60
1,075.00	7,874.00
26,902.00	4,835.00
4,365.00	27,630.50
0.00	31,838.34
9,521.03	22,042.50
1,395.00	4,775.00
17,954.00	145,403.98
1,060.00	26,337.00
28,823.20	25,370.43
28,823.20	25,370.43
7,153.00	14,783.72
4,032.52	24,725.81
58,169.77	53,412.21
170.00	7,239.00
1,722.59	52,313.27
1,353.00	39,416.50
0.00	6,668.00
4,360.00	30,591.50
37,900.50	43,123.62
750.00	5,942.00
51,074.36	182,559.27
0	11,957.02
1,796.00	48,817.50
791,418.96	3,180,075.40

Havre de Grace	0.00	
Howard West	67,205.52	
Hunt Valley	22,041.66	
International Friendship	6,941.61	
Lake Shore-Severna Park	44,417.52	
Laurel	165.80	
Leonardtwn (St. Mary's)	40,349.13	
Lexington Park	113,325.77	
Metro Bethesda	184,485.60	
Middle River	8,949.00	
Montgomery Village	31,737.00	
Mt. Airy	31,995.50	
New Market	31,838.34	
North Bethesda	31,563.53	
Olney	6,170.00	
Parole (Annapolis)	163,357.98	
Pikesville (Owings Mills)	27,397.00	
Potomac	54,193.63	
Potomac - Bethesda	54,193.63	
Prince Frederick	21,936.72	
Prince Georges Co.	28,758.33	
Rockville	111,581.98	
Smoketown (Brunswick)	7,409.00	
South Anne Arundel Co.	54,035.86	
Southern Frederick Co.	40,769.50	
Southern Harford Co.	6,668.00	
Sykesville	34,951.50	
Towsontowne	81,024.12	
Upper Marlboro	6,692.00	
Washington DC	233,633.63	
Washington Global	11,957.02	
Westminster	50,613.50	
	0.00	
Club-Member	District	3,971,494.36



MEANINGFUL WAYS TO GIVE

Rotary Foundation Sustaining Member

- When you give \$100 or more per year to the Annual Fund.

Paul Harris Fellow

- Become a Paul Harris Fellow when your cumulative donation level hits \$1,000
- When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

Benefactor


- When you include the Endowment Fund as a beneficiary in your estate plans or when you donate over \$1,000 and less than \$10,000 to the fund outright.

AS YOUR GIVING ACCELERATES

Bequest Society

- When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.

Major Donor

- When your cumulative donations reach \$10,000.
 - Level 1: \$10,000 to \$24,999
 - Level 2: \$25,000 to \$49,999
 - Level 3: \$50,000 to \$99,999
 - Level 4: \$100,000 to \$249,999
- 

SUBSTANTIAL COMMITMENT'S TO THE ROTARY FOUNDATION

Arch Klumph Society

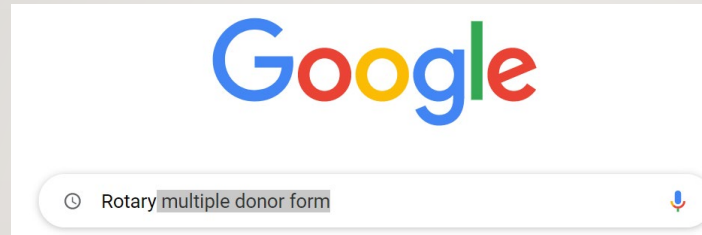
- When your cumulative donations reach \$250,000. Recognition includes an induction ceremony and your picture and biography in the Arch Klumph Society interactive gallery at the Rotary International headquarters in Evanston, Illinois, USA.
 - Trustees Circle: \$250,000 to \$499,999
 - Chair's Circle: \$500,000 to \$999,999
 - Foundation Circle: \$1,000,000 to \$2,499,999
 - Platinum Trustees Circle: \$2,500,000 to \$4,999,999
 - Platinum Chair's Circle: \$5,000,000 to \$9,999,999
 - Platinum Foundation Circle: \$10,000,000 and above

Legacy Society

- When you promise a gift of \$1 million or more to the Endowment, you'll be listed in Rotary's annual report and invited to exclusive Rotary International and Foundation events.

A QUICK WAY TO GET TO THE VARIOUS DONOR CONTRIBUTION FORMS

- Use your search engine:



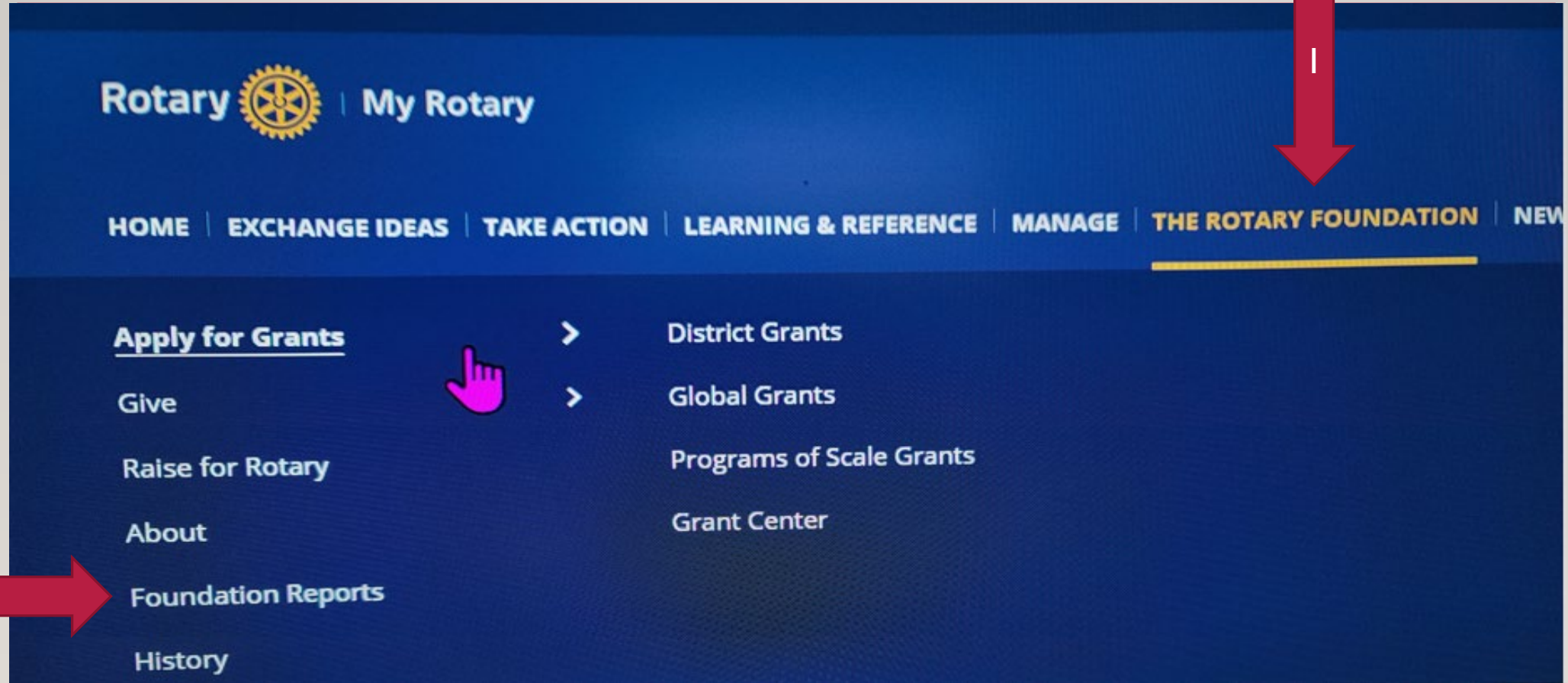
<https://www.google.com/>

Your connection to this site is **secure**

- Others:
 - **Rotary** The Rotary Foundation Contribution Form
 - **Rotary** Paul Harris Fellow Form
 - **Rotary** Paul Harris Society Form
 - **Rotary** Rotary Direct Donation Form
 - **Rotary** Understanding Recognition Points
 - **Rotary** Three Strategies and Resources for District Leaders

WHERE TO FIND CLUB FOUNDATION REPORTS

[HTTPS://MY.ROTARY.ORG/EN/LOGIN](https://my.rotary.org/en/login)



The screenshot shows the Rotary My Rotary website navigation menu. The top navigation bar includes the Rotary logo and the text "My Rotary". Below this, a horizontal menu lists several options: HOME, EXCHANGE IDEAS, TAKE ACTION, LEARNING & REFERENCE, MANAGE, THE ROTARY FOUNDATION (highlighted with a yellow underline), and NEW. A red arrow points down to the "THE ROTARY FOUNDATION" link. Below the main navigation, a dropdown menu is open, listing several options: Apply for Grants, Give, Raise for Rotary, About, Foundation Reports, and History. A pink hand cursor is positioned over the "Give" option. To the right of the dropdown items, there are right-pointing chevrons (>) and a list of sub-items: District Grants, Global Grants, Programs of Scale Grants, and Grant Center. A red arrow with the number "2" points to the "Foundation Reports" option in the dropdown menu.



CLUB RECOGNITION SUMMARY

AS OF 13 MAY 2020

Your Club, STATE, UNITED STATES

District: 7620

Paul Harris Fellows: 54
Benefactors: 6

Bequest Society: 1
Major Donors: 6

Rotarian Donors: 47
Rotarian Non-Donors: 13

Rotary Direct Donors: 4
Non-Rotarian Donors: 0

All-Time Giving: \$708,033

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	— Last Contribution —		Benefactor	Rotary Direct
		Y	1,000.00	PHF	Jun-2005	43,827.19	May-2020	POLIO PLUS	N	
		Y	9,000.00 *	PHF +8	Aug-1997	2,800.00	Apr-2018	AF-SHARE	N	
		Y	2,000.00	PHF +1	Jun-2013		Apr-2018	POLIO PLUS	N	
		Y	5,750.00	PHF +4	Apr-2015	4,750.00	Apr-2020	AF-SHARE	N	Y
		Y	1,100.00	PHF	Jan-1981		Oct-1988	POLIO PLUS	N	
		Y	1,000.00	PHF	May-2018				N	
		Y	2,075.00	PHF +1	May-2000	75.00	Dec-2017	AOFWTRSAN	N	
		Y	1,000.00	PHF	Jun-2012	1,000.00	Jun-2018	PFGGPEACE	N	
		Y	5,000.00	PHF +4	Jan-1979		May-2009	AF-SHARE	N	
		Y	6,691.00	PHF +5	Jun-1998	3,691.00	Feb-2020	AF-SHARE	N	
		Y	2,250.00	PHF +1	Jan-1981	825.00	Mar-2015	AF-SHARE	N	
		Y	1,000.00	PHF	May-1987				Y	
		Y	2,200.00	PHF +1	May-1996	1,200.00	Apr-2020	AF-SHARE	N	
		Y	9,000.00 *	PHF +8	Aug-1997	15,140.75	Jun-2017	POLIO PLUS	Y	
		Y	3,000.00	PHF +2	Jun-1984	1,000.00	May-2009	AF-SHARE	N	
		Y	1,300.00	PHF	Dec-2019	1,300.00	May-2020	AF-SHARE	N	Y
		Y	9,000.00 *	PHF +8	Nov-2002	9,500.00	Dec-2019	AF-SHARE	Y	Y
		Y	2,200.00	PHF +1	Dec-2002	200.00	Dec-2005	AF-SHARE	N	
		Y	2,584.82	PHF +1	Jun-1994	1,584.82	Feb-2020	AF-SHARE	N	
		Y	2,896.00	PHF +1	Jun-1999	96.00	May-2017	AF-SHARE	N	
		Y	1,900.00	PHF	May-2007	100.00	Apr-2020	AF-SHARE	N	
		Y	2,000.00	PHF +1	May-1991		Mar-2014	AF-SHARE	N	
		Y	9,000.00 *	PHF +8	Sep-1985	10,076.04	Sep-2019	PF-SHARE	Y	
		Y	2,000.00	PHF +1	May-2016		Mar-2019	AF-SHARE	N	
		Y	3,000.00	PHF +2	Jan-1990		May-2004	AF-SHARE	N	

Personal data on this report should be used for authorized Rotary purposes only. By accessing this data, you agree to abide by [Rotary's Data Use Policy](#).

Please welcome

DG Dr. Geetha Jayaram
District 7620 Rotary Foundation Chair – Elect
2022 - 2025



Geetha Jayaram, MD

PURPOSE AND INTENT

DISTRICT 7620

MEMORANDUM OF UNDERSTANDING

- ✓ A memorandum of understanding (MOU) is a document that **describes the broad outlines of an agreement that two or more parties have reached.**
- ✓ MOUs communicate the mutually accepted expectations of all of the parties involved in a negotiation.
- ✓ While not legally binding, the MOU signals that a binding contract is imminent.

MEMORANDUM OF UNDERSTANDING

- MOU is a stand-alone document and available on the District 7620 web site under the **Foundation** tab
- Read very carefully to all MOU compliance statements
- Each Club must have a Club Rotary Foundation Chair.
- Both Club President and Club Rotary Foundation Chair must initial each page (lower right).
- Scan and send entire MOU document with officer signatures by email to the District Rotary Foundation Chair (DRFC) **not later than** date stamped 5:00pm EST, Friday, March 25, 2022. No exceptions.
- Any questions are welcome by PDG Rich by email 18.19.dg7620@glovercrew.net
with cc to DG Geetha: districtgovernor2122@gmail.com

DISTRICT DESIGNATED FUNDS (DDF) GRANT CRITERIA “TOP 10” MEMORANDUM OF UNDERSTANDING (MOU)

1. The Club President-Elect and Club TRF Chair are **required** to attend annual DACdb Grants Module training Parts II, III, and IV of the DRFC Learning Series, prior to March 01, 2022.
 2. The Club President-Elect and Club Foundation Chair are **required** to be MOU certified (President & Club TRF Chair).
 3. The District and Club Data Base (www.DACdb.com) is **required** to submit and manage a district grant, no exceptions.
 4. The TRF global grant module (www.myrotary.org) is **required** to submit and manage a global grant, no exceptions.
- 4. **\$120** per capita minimum of club membership total giving to the Annual Fund (AF) – **Club Banner Report**.
 - 5. **50%** of club members contribute **\$25** to the Annual Fund. (**note: Existing Active Rotarians are those with an admission date prior to 1 July. Only “existing members are counted for EREY, TRF Giving, RFSM, or PHS participation – not by “All Active Rotarians”**) – **Club Banner Report**.
 - 6. **50%** of club members are a Paul Harris Fellow. – **Recognition Report**
 - 7. **\$5,000** maximum DDF Match per eligible club. – **MOU (this limit may vary depending on total member giving to AF)**
 8. **15%** is the maximum grant award to any one club of the total District DDF Community Grant Fund.
 9. District community grant projects are **required** to be complete, submitted and approved “Final Report” by the DRFC no later than May 30, 2023.
 10. Ensure that all grant activities are in accordance with **local laws**.

FINAL: January 01, 2022

Annual club banner recognitions

The following recognitions are awarded annually at the conclusion of the Rotary year and are based on active dues-paying membership as of 30 June. The eligible clubs will be determined by The Rotary Foundation and the appropriate recognitions sent to the current district governor for presentation.



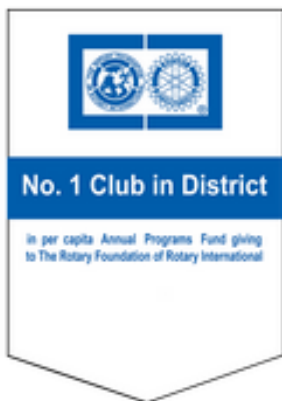
100% Rotary Foundation Sustaining Member Club

This recognition honors clubs in which every dues-paying member personally contributes US\$100 or more to the Annual Fund during the Rotary year. [Read more about individual recognition for Sustaining Members.](#)

Every Rotarian, Every Year Club



This recognition is awarded to clubs that achieve a minimum US\$100 per capita from active dues-paying members and 100 percent participation with every active member contributing some amount to the Annual Fund during the Rotary year.



Top three per capita in Annual Fund giving

Banners are given to the top three per capita giving clubs in each district. To be eligible, clubs must achieve a minimum \$50 per capita to the Annual Fund.

Please Welcome

District Foundation Grants Chair

BJ Skinner

2020 - 2023



Barbara J. Chamberlain-Skinner, Esq.

LET'S US TALK ABOUT COMMUNITY GRANTS

Criteria Guidelines & Writing Quality Grants

- ✓ Clearly state your vision for the project
- ✓ Clearly state your Objective(s)
- ✓ Clearly state your plan of Sustainability
- ✓ Clearly state objectively how it is Measured
- ✓ How will the outcome be determined Impactful

PROJECT VISION

- **What is Our Project Vision?**

A Plan that reflects the desires and interests of Rotary worldwide.

The Rotary Foundation (TRF) guidelines lead in such a way that our projects demonstrate they are

SUSTAINABLE, MEASURABLE AND IMPACTFUL

in our local communities and around the world.

YOUR OBJECTIVES

Is it specific * Is it attainable * Is it relevant

- Strengthen impact of club project(s)
- Encourage clubs to work together
- Encourage partnerships with community organizations
- Encourage Creative Innovation
- Advance understanding of The Rotary Foundation's work
- Enhance Rotary's public image
- It is time-lined

PRINCIPLES OF SUSTAINABILITY

- *Impact after foundation funding is expended*
- *Creates regional input and local knowledge*
- *Respect for the environment & natural resources*
- *Reach impactful beneficiaries to succeed beyond*
- *Use innovative methods*
- *Significantly demonstrate effectiveness of the beneficiaries.*

OUR PLAN WILL BE MEASURABLE

- Clearly identify **how** you will know objective(s) are accomplished
- Always strive for **quality**
 - often defined in **quantity**
- Assure project is **attainable** - funding, manpower, and authority to accomplish
- Assure the project is **relevant** - Are there factors beyond your control?
- Add specific language to **specify** completion time.

HOW IS THE OUTCOME DETERMINED IMPACTFUL

- TRF is interested in *proof of impact*. To evaluate whether time, money, and efforts are making a difference.
- Often a community indicators are well-being or program performance metric – Program-level and population level.
- Are we turning the **curve** – beating the data baseline ?
- Understand the *type* and *quantity* of impact we are making helps us figure out what's working to change our communities and what needs to be improved.
- Claims about making a difference are no longer sufficient; **evidence** of how much difference you're making is now required.

Please Welcome Back

District Rotary Foundation Chair

PDG Rich



PDG Richard B. Glover, RDFC

DID WE MEET THE LEARNING OBJECTIVES FOR THE ROTARY FOUNDATION (TRF)

- 1) District Designated Funds - Share (DDF-Share) Mechanics
** District and Global Grants – The Annual Fund is the **Engine for our grants**
- 2) Every Rotarian Every Year (EREY)
- 3) Purpose and Intent of a Memorandum of Understanding (MOU).
- 4) “TOP – 10” Application modules, compliance, eligibility.
- 5) TRF changes,
- 6) TRF Learning Series.
- 7) Presentation link. <https://rotary7620.org/>
- 8) Q&A.



REVISED SCHEDULE: EIGHT-PART 2022 TRF LEARNING SERIES

EVERY THURSDAY & SATURDAY
BEGINNING **FEBRUARY 10, 2022**

ALL DISTRICT MEMBERS ARE WELCOME.



MANDATORY FOR MOU #II, III, IV FOR PRESIDENT-ELECT, CLUB TRF CHAIR



Part II - Learning the Mechanics of The Rotary Foundation; Learn how the TRF works and why it is the "Engine" that drives our districts giving

- Thursday, February 10 @ 7:00 – 8:00 pm, *and*
- Saturday, February 12 @ 9:00 – 10:00 am



Part III – Be Prepared to Apply for District Grants; Learn about the Memorandum of Understanding (MOU) for community and global grants eligibility, where do we apply, easy steps of the application, and how do we get funded.

- Thursday, February 17 @ 7:00 – 8:00 pm, *and*
- Saturday, February 19 @ 9:00 – 10:00 am



Part IV – Be Prepared to Apply for Global Grants; Learn about the where and how do we apply, easy steps of the application tips, and how do we get funded.

- Thursday, February 24 @ 7:00 – 8:00 pm, *and*
- Saturday, February 26 @ 9:00 – 10:00 am

Part I – Learn the 105 years History of The Rotary Foundation;

Learn about the humble beginnings in 1917 to today as one of the most highly respected foundations in the world.

- Thursday, March 10 @ 7:00 – 8:00 pm *and*
- Saturday, March 12 @ 9:00 – 10:00 am

Part V - Paul Harris Fellow vs. Paul Harris Society; "Why is the Difference so Significant?"

- Thursday, March 17 @ 7:00 – 8:00 pm, *and*
- Saturday, March 19 @ 9:00 – 10:00 am

Part VI - PolioPlus; "We are that close" to eradication of Polio in the world. And what is the "Plus"?

- Thursday, March 24 @ 7:00 – 8:00 pm, *and*
- Saturday, March 26 @ 9:00 – 10:00 am

Part VII - Your Legacy; Rotary's Promise; Learn the many ways to establish your own legacy in support of The Rotary Foundation

- Thursday, March 31 @ 7:00 – 8:00 pm, *and*
- Saturday, April 02 @ 9:00 – 10:00 am

Part VIII - Other Programs - **Make-ups, specific topic, club presentations and special requests (Dates to be determined):**

Encourage requested presentations – Contact PDG Rich Glover, DRFC at 18.19.dg7620@glovercrew.net to schedule.



<https://rotary7620.org/>



- People of Action -
in Central MD & DC



QUESTIONS

PDG Rich Glover, District Rotary
Foundation Chair
Cell: (301) 980-4976
Email: 18.19.dg7620@glovercrew.net





District 7620 Foundation Leadership

PDG Rich Glover
District Rotary Foundation Chair
2019-2022



DG Dr. Geetha Jayaram
District Rotary Foundation
Chair-Elect
2022-2025



Barbara J. Chamberlain-Skinner, Esq.
District Rotary Foundation
Grants Committee Chair
2021-2024

