

Report to the District 5080 Clubs

Rotary 2020-2021 year

Dear club leader – *I'm presenting you with a lengthy report, I'm afraid, so let me help (I hope) by giving you a rough 'table of contents'. If you have only limited interest in certain topics, feel free to skip to them and ignore the rest or perhaps share the report with someone who wasn't targeted when I sent it out. Our District policy Manual requires that the report be produced and circulated.*

- ➔ How our Annual Fund and Polio Plus Fund ended up
- ➔ Grants – all types and what we did
- ➔ Zoom Foundation sessions we held this year
- ➔ Club Foundation Committees & Chairs info
- ➔ Club qualification, Stewardship and Training
- ➔ Our special project – the Roll-a-hippo Project
- ➔ What's new going forward?

The Rotary Foundation donations: If one were to look at the basket of Rotary Funds we Rotarians donate, you'd have to be extremely pleased – it would seem we have hit our historic HIGH in total donations (all Funds considered) – less than \$3,000 short of \$1 million. Yes, we were helped along considerably by the two gifts from new Arch Klumph donors – Larry Coulson and Pierce Smith, but the rest of us did a pretty good job too. **WELL DONE.**

The Annual Fund: Once again, our district has distinguished itself, by responding to the goals with donations – the money that comes back to us 'in spades', for our projects here and around the world. While our goal for the year was lower than the previous year (understandable, considering the state of the economy and where people were), we had clubs and individuals step up and help us to exceed those goals. 53 of our 56 clubs were donors – as members or as a club. Three (3) of our clubs earned 100% DONOR BANNER status, and two of them were also 100% EREY BANNER status winners.

There were 36 clubs (64%) that met or exceeded their Fundraising goal and only 3 clubs that were unable to make a donation. Overall, our members and clubs donated \$327,442 which represented 130% of our stated goal and \$146.77 per capita. In three years, our generosity will be reflected back to us, in returned DDF for District Grants, Global Grants and other district initiatives.

The Polio Plus Fund: One of the highpoints for the year comes from one of our Arch Klumph donors – Larry Coulson. We had a couple of other major donations to this Fund too...and so, in my memory, it is the first time our district has exceeded dollars donated to the Annual Fund. At just over \$368,000, we led the Zones by a significant margin. Truly an astounding feat. And, in case you wondered – this was done while there were still 9 clubs that

were unable to make a donation to the Polio Plus Fund! There were 32 clubs that met or exceeded their stated goal for the year – just 57%.

Grants:

Global Grants: Our District has and maintains an excellent record for participation in Global Grants. By the most recent records, based on both a sponsoring or funding partnership involvement, we have a 50% involvement. In reviewing the reports I was privy to, we had, at the end of June

- 6 in Draft mode; 4 with a D5080 club as the international sponsor and with 2 where one or more of our clubs as a funding partner. [*one has since moved to the next stage*].
- 2 more required an authorization, with only one involving DDF from us,
- 15 which had, during the course of the year been approved: of these 7 were from sponsoring clubs in 5080 while the other 8 were involving funding partnership arrangements, all but 2 involving district (DDF) money.

It is good to see that clubs recognize the need to make contact with the District Global Grant group to inform them of proposed projects and to request DDF to match club funds. I do not believe we will be in a situation where we are sitting on piles of DDF looking for a place to use it, like had been the case at times, in the past. We firmly believe that Rotarians have made their Annual Fund contributions to be USED not built into a ‘rainy day treasury’.

District Grants: This past year was the last year of a special opportunity to use some of the ‘banked DDF’ that had been accumulating over the years. We – the clubs, have taken full advantage of this windfall.

Along the way, we came to understand that District Grants (of either type) do not have to be completed in the short time span we had been accustomed to – about 8 months. They could, in fact, take almost twice that long to complete. This benefits clubs in areas where winter frost can delay implementation. Without getting into details here, suffice it to say that several clubs almost shouted HURRAH...and got busy planning work for their next project.

Express Grants: Again we offered the Express Grants program. While we weren’t able to offer it with as much money per grant, the program was fully subscribed with little marketing effort. I think we can state it is an appreciated program, for the most part and I

understand it will be again offered in the coming year (2021-2022). Check your e-mail and/or the District website for further information and details.

No matter whether we use Global Grants, District Grants or Express Grants, we must remember that they are financed from the donations members make to the Annual Fund.

Rotary Foundation Education: Because we were unable to have training or education sessions in person this year, we embarked on a series of Zoom education sessions. They ranged from specialized ones for the Club Foundation Committee Chair to general ones about Polio, Reading Reports, Vocational Training Teams and Foundation Recognitions. Some were recorded and may still be available on the website. At this moment, the plan going forward, according to DRFC Chair Bill Dunwoody, is to have in-person events in late October. Stay tuned.

The District Rotary Foundation Committees: To end my term without saying thank you to those who did the heavy lifting would be unforgivable. To Hank Martin, Eric Hoyle, John Packard, Chandi Bandara, Ed Kowitz, Tim Cochrane, Peter Kalunian, Rebecca Kolbenson, PDG Bob Carroll, PDG Bev Reed, Don Hart and especially to Jim Feeney, Karen Cook, Jim Bauer and Bill Furey...you have my deepest thanks. Even more so...you have the deepest appreciation of the members of the clubs in D-5080. We were better because we talked and shared ideas and differences of opinion. We were better because each and every one of you cared enough to give the time and energy I demanded of you.

Those that have agreed to serve in the next term are to be thanked. They'll have their work cut out for them.

Grant Training, Qualification and Stewardship: It was a bit of a surprise to realize that we had been a bit 'informal' around our training and the whole concept of Grant Qualification but this year we took matters to a new level and we hope it made things easier to understand – both from the standpoint of what was needed, why it was needed and when it was needed. We also learned that there was the need to establish a Club Steward role for clubs that had a District Grant or a Global Grant. That steward need is spelled out quite clearly in TRF documents but somehow it slid by us before. The concept of qualification for Grants also needed a great deal of clarification and we think we succeeded there too. We know that District Grants are different from Global Grants so the training can't be the same. All in all, we are clearer about what we require from clubs – in fact it's not the club but the names on the application we require it from. I'm sure things will continue to evolve in this area, but I'm confident we made things much better.

We produced our own ZOOM program for District Grant Training for Qualification (complete with test) and worked with RI Training people to encourage the development of a recertification module, to complement the Grant Management Seminar program, so people working with Global Grants can extend their original course qualification by becoming recertified in a very simple way.

Now we require any two of the contacts on an application to complete the appropriate qualification program [our D-5080 one for District Grants and the Rotary Learning Center's Grant Management Seminar one for Global Grants] to invoke the necessary qualification PRIOR to being allowed to receive Rotary Foundation monies. The clubs steward also needs to complete the appropriate program(s) too.

Our special project – the ROLL-a-HIPPO project: I have sent out a special letter to every club dealing with this project but let me just say a few words here:

I believe, but can't prove, this was our first attempt at a Pan-district grant project. The thought that we might get all the clubs to engage was just too good to ignore – a \$75 donation being matched by District Foundation money, getting 100 rollers that would make water fetching easier and maybe even safer. It was irresistible. We plunged right in. Thanks to those in District leadership that we consulted, they were enthusiastic and gave their thumbs up approval. We got Miranda to whip up a marketing slide and we wrote material to send to the clubs and post on the website. In no time at all, donations came rolling in, with one from one of our very smallest clubs – the RC of Radium Hot Springs Sunrise. In no time at all, we had surpassed our goal but money kept coming. Clearly we had a winner. Even though we had to work with two countries and two currencies, we made things work (easily, I think) for clubs and members. Even after we had reached our date we set to close thing, we received several more donations.

Working with the Roll-a-hippo Foundation and their volunteer staff (Rotarians, in Gibsons BC) made things simple when it came to financial tracking and learning we would be working with another Rotary Club (RC of Hillcrest) made us feel secure in how things would transpire. I hope you're as proud of how this worked out as I am.

Going forward: Thank you for the privilege and honour to be our District Rotary Foundation Committee Chair for the last 3 years. I never thought PDG Bev Reed was doing me a favour, but by asking me to take on this role, she did. Thanks Bev. Thanks 5080