



D6980 UNIVERSITY FOUNDATION SEMINAR ANNUAL GIVING

July 20, 2019

Orlando, FL

Sanjay L. Deshpande

Chair, Annual Fund Subcommittee (2019-20)

Club Foundation Chair, Lake Nona Lunch Rotary Club (2019-20)

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DISTRICT 6980 FOUNDATION SEMINAR AGENDA



Purpose: Educate the participants on the Rotary Foundation Programs, Activities and Reports.

10:30 – 10:45	Welcome, Goals, Citation, Take Action	Jo Weber
10:45 – 11:00	Annual Giving	Sanjay Deshpande
11:00 – 11:15	District Designated Funds	Bob Shydo
11:15 – 11:00	Polio Eradication	John DeMauro
11:30 - 11:35	District Grants	John Beall
11:35 – 11:45	Global Grants	George Stuart
11:45 – 11:55	Major Donors/Endowments/ Major Gifts	Dick Phoebus
11:55 – 12:10	Paul Harris Society	John Rabley
12:10 – 12:15	Scholarships	Barry Gainer
12:15 – 12:30	Other Concerns	All

TODAY IS A SPECIAL DAY IN HUMAN HISTORY....



AND IN ROTARY HISTORY



Rotary Club of Wapakoneta (Near Lima), OH



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL



DESIGNED BY 



\$341.1 Million

The Rotary Foundation 

IN CASE YOU DIDN'T KNOW, THE ROTARY FOUNDATION HAS RAISED \$341.1 MILLION LAST YEAR.

 **Rotary**  *PEOPLE OF ACTION* 

ROTARY CONNECTS THE WORLD



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL



2018 FACTS

Summary Statistics

Contribution summary	2017-18	Cumulative
Annual Fund	\$131.4 million	\$2.6 billion
Endowment Fund	\$28.5 million	\$348.6 million
PolioPlus Fund	\$143.6 million	\$1.5 billion
Other*	\$37.6 million	\$194.4 million
Total outright contributions	\$341.1 million	\$4.7 billion
Total new commitments to the Endowment Fund	\$59.5 million	\$804.9 million
Polio transfers**	\$14.1 million	—
Grand total	\$414.7 million	—
Program awards and operations	\$302.7 million	Since 1947: \$4.27 billion

Source:
Rotary Foundation
and Facts
Publication 159-EN

Jul 20, 2019



...AND ROTARIANS GIVE TIME



ROTARY CONTRIBUTES 45 MILLION VOLUNTEER HOURS IN THE WORLD PER YEAR WORTH.....\$850M

45 Million Volunteer Hours
\$850,000,000

 **ACCORDING TO JOHN HOPKINS UNIVERSITY CENTER FOR CIVIL SOCIETY STUDIES, IF COMMUNITIES HAD TO PAY FOR THE SERVICES THAT ROTARY VOLUNTEERS PROVIDE, IT WOULD COST \$850M PER YEAR.**

 **Rotary**  *PEOPLE of ACTION*

DESIGNED BY RJ



So, How do we keep track of the Annual Giving?




Through Reports provided by the Rotary Foundation

 <https://my.rotary.org/en/user/login>

 Manage

 Reports

 Club Reports / Club Giving / Contributions and Recognitions / Club Giving / View Reports

 [Club Fundraising Analysis](#)

 [Club Recognition Summary](#)



So, How do we keep track of the Annual Giving?



Report	Content	Type
Club Fundraising Analysis	Five-year dashboard of Annual Fund goals, giving to the Annual Fund and other designated funds, and recognition totals. Use it to set goals.	Club, district
Club Recognition Summary	Provides members' Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct participation, benefactors, last contribution date, and designation; indicates 100% Paul Harris Fellow Club achievement and date, along with the clubs' all-time Foundation giving; use to identify noncontributing clubs	Club, district



Club Fund Raising Analysis

as of the Month Requested over 12 months



Xxxxxx Club, FL

Annual Fund Goal		Annual Fund Contributions		Total Contributions	
2019 - 2020	\$0	2019 - 2020	\$0	2019 - 2020	\$0
2018 - 2019	\$20,000	2018 - 2019	\$30,200	2018 - 2019	\$32,400
2017 - 2018	\$6,500	2017 - 2018	\$16,650	2017 - 2018	\$17,175
2016 - 2017	\$11,000	2016 - 2017	\$54,824	2016 - 2017	\$55,824
2015 - 2016	\$18,500	2015 - 2016	\$29,234	2015 - 2016	\$29,259

AF PerCapita	Club	District
2019 - 2020	\$0	\$0
2018 - 2019	\$302	\$171
2017 - 2018	\$144	\$158
2016 - 2017	\$543	\$187
2015 - 2016	\$259	\$163

Membership	
2019 - 2020	0
2018 - 2019	100
2017 - 2018	116
2016 - 2017	101
2015 - 2016	113

	EREY Members	Sustaining Members	PHS Eligible
2019 - 2020	0	0	0
2018 - 2019	6	4	3
2017 - 2018	101	101	1
2016 - 2017	113	113	3
2015 - 2016	120	120	1

Annual Fund Report Range Comparison (Blue Diamond)
 Annual Fund Total for Previous Years (Orange Circle)
 Annual Fund Goal (Green Square)

Annual Fund Report Range Comparison is the Annual Fund giving from 1 July to 30 June for current and previous years

The prior four-year average in Annual Fund giving from July through 30 June is \$32,727. This figure can be used to compare Annual Fund giving for the current Rotary year.

Total Contributions include Annual Fund, PolioPlus, approved Foundation Grants, Other Giving, and Endowment Fund (Permanent Fund) contributions for the reporting period.

For questions and additional club reports please use Member Access at www.rotary.org or call our Contact Center toll free at (+1-866-976-8279) or by email at (contact.center@rotary.org).

Note: 'EREY Members' reflect the number of donors who contributed some amount to the Annual Fund during the Rotary Year. 'Sustaining Members' reflect the number of donors who contributed US\$100 or more to the Annual Fund. 'PHS Eligible' reflect the number of donors who contributed US\$1,000 or more to the Annual Fund, Polio Plus or approved Foundation Grant.



Club Recognition Summary AS OF THE DATE REQUESTED



Xxxxxx, FL, United States

100% Paul Harris Fellow Club 2016 - 2017

District:	Paul Harris Fellows:	Bequest Society:	Rotarian Donors:	Rotary Direct Donors:	All-Time Giving:
6980	72	10	81	0	\$657,223
Club:	Benefactors:	Major Donors:	Rotarian Non-Donors:	Non-Rotarian Donors:	All Time Giving to All Funds
44xx	19	6	16	0	?

Xxxxxx, FL, United States

100% Paul Harris Fellow Club 2016 - 2017

District:	6980	Club:	44xx
Paul Harris Fellows:	72	Benefactors:	19
Bequest Society:	10	Major Donors:	6
Rotarian Donors:	81	Rotarian Non-Donors:	16
Rotary Direct Donors:	0	Non-Rotarian Donors:	0
All-Time Giving:	\$657,223	All Time Giving to All Funds	?



Club Recognition Summary AS OF THE DATE REQUESTED



Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	----- Last Contribution ----- Date Designation		Benefactor	Rotary Direct
44xx	R/C of Xxxxxx					5749.25	May-19	POLIO PLUS		

Rotary ID	44xx
Name	R/C of Xxxxxx
Club Member	
Recognition Amount	
Current PHF Level	
PHF Date	
Foundation Recognition Pts Available	5749.25
Last Contribution	May-19
Date Designation	POLIO PLUS
Benefactor	
Rotary Direct	



Club Recognition Summary

AS OF THE DATE REQUESTED



- All members of this Club are NOT included below
- Note that the amounts in the report are “recognition” amounts and may be greater than actual contributions.
- Contributions above \$9000 NOT shown here for confidentiality reasons

- This report is sorted first by Last Contribution date
- The second level sort is by Recognition amount
- Foundation Recognition Points may be transferred to other individuals – Rotarians or non-Rotarians – to help them achieve their first or higher PHF recognition..

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	----- Last Contribution -----		Benefactor	Rotary Direct
							Date	Designation		
1946588		Y	4800.00	PHF+3	Feb-1993	800.00	Jun-19	AF-SHARE	Y	
613288		Y	9000.00	PHF+8	Feb-1985	10200.00	Mar-19	AF-SHARE	Y	
8031817		Y	2250.00	PHF+1	Jan-2011	350.00	Mar-19	AF-SHARE	N	
9984229		Y	175.00			100.00	Feb-19	AF-SHARE	N	
5402487		Y	9000.00	PHF+8	Oct-2010	10700.00	Dec-18	AF-SHARE	N	
6332396		Y	9000.00	PHF+8	Mar-2011	10100.00	Nov-18	AF-SHARE	Y	
3124347		Y	9000.00	PHF+8	Jun-1997	800.00	May-18	AF-SHARE	Y	
1680430		Y	9000.00	PHF+8	Jan-1993	500.00	May-18	AF-SHARE	Y	
1146093		Y	9000.00	PHF+8	Dec-1986	14625.00	May-18	AF-SHARE	Y	
607574		Y	9000.00	PHF+8	Apr-1998	49571.34	May-18	AF-SHARE	Y	
615294		Y	7168.00	PHF+6	May-1990	1168.00	May-18	AF-SHARE	Y	
8974255		Y	1100.00	PHF	Mar-2017	400.00	May-18	AF-SHARE	N	
8845340		Y	1100.00	PHF	Apr-2017	500.00	May-18	AF-SHARE	N	
2500238		Y	400.00			400.00	May-18	AF-SHARE	N	
9108328		Y	300.00			300.00	May-18	AF-SHARE	N	
9812862		Y	200.00			200.00	May-18	AF-SHARE	N	
8107290		Y	200.00			200.00	May-18	AF-SHARE	N	
9984203		Y	100.00			100.00	May-18	AF-SHARE	N	
9619168		Y	100.00			100.00	Jul-16	AF-SHARE	N	
10297636		Y	0.00			0.00			N	
10297632		Y	0.00			0.00			N	
10297629		Y	0.00			0.00			N	



Club Recognition Summary

AS OF THE DATE REQUESTED



This is your Rotary club's Club Recognition Summary.

The report is available online to club presidents, club secretaries, and club foundation chairs through Member Access at www.rotary.org. It is important that club officers take time to review this report.

If you notice errors, duplicate accounts or have questions, please contact Rotary International. If you write, please include a marked copy of your report indicating the discrepancy and a brief write-up of the problem. You should also give your name, telephone number, fax number, email address, and street address so that staff may assist you as expeditiously as possible.

Please note that the Club Recognition Summary is a 'recognition' report - not a contribution or membership report. For all constituents associated with a Rotary club, it summarizes Paul Harris Fellow (PHF) Recognition Totals and also Foundation Recognition Points available toward naming a PHF. A constituent can be a Rotarian (donor or non-donor), a non-Rotarian, a business or an organization.

For confidentiality reasons, this report will not display recognition amounts greater than US\$9,000. Rotarians and non-Rotarian donors who have requested to be anonymous are not included on this report.



Club Recognition Summary AS OF THE DATE REQUESTED



Below is a glossary to help you better understand the Club Recognition Summary:

- **Paul Harris Fellow:** An individual who contributes US\$1,000 (or in whose name US\$1,000 is contributed) to the Annual Fund or other approved programs.
- **Multiple Paul Harris Fellow:** A Paul Harris Fellow will receive a new pin for each additional US\$1,000 personally (or in whose name is) contributed beyond his/her original PHF.
- **100% Paul Harris Fellow Club:** 100% status is achieved when every member of the club is certified as a Paul Harris Fellow. This is a one-time recognition only. To obtain this recognition a club representative contacts the district governor after determining that all current, dues-paying club members are Paul Harris Fellows. The district governor then confirms that all members are Paul Harris Fellows and notifies The Rotary Foundation.
- **Benefactor:** A Benefactor is anyone who informs the Foundation in writing that s/he has made provisions in their will, or other estate plan, naming the Foundation's Endowment Fund (formally called the Permanent Fund) as a beneficiary; or anyone who makes an outright gift of US\$1,000 or more to the Foundation's Endowment Fund.
- **Bequest Society:** Individuals who commit US\$10,000 or more to the Rotary Foundation Endowment, via estate plans, are recognized as Bequest Society Members. Bequests from spouses are often combined, upon request. Donors who commit jointly as a couple are counted as a single Bequest Society member on this report. If the spouses are in two different clubs, they will be counted as one on each club's report.
- **Major Donor/AKS:** Major Donors are individuals, non-Rotary affiliated foundations, and corporations whose personal cumulative donations to the Rotary Foundation reach US\$10,000 or more. Contributions from spouses are often combined, upon request. Those whose cumulative donations are US\$250,000 or more are recognized as Arch Klumph Society members (AKS). Spouses who give jointly as a couple are counted as a single Major Donor/AKS Member on this report. If the spouses are in two different clubs, they will be counted as one on each club's report. The Major Donor, Arch Klumph Society, and Bequest Society Report contains a list of donors who have achieved these substantial giving levels. It is available to club presidents, club secretaries, and club foundation chairs on My Rotary at www.rotary.org/myrotary, or on Rotary Club Central.



Club Recognition Summary AS OF THE DATE REQUESTED



Below is an explanation of Club Recognition Summary columns:

" + ": Indicates individual is deceased. " * ": Indicates constituents with recognition amounts over 9,000.

- **Rotary ID:** A Constituent's Rotary International identification number. If the constituent is a non-Rotarian or a non-Rotary organization, this is his/her/their donor account number. An individual should have only one identification number. That number will always contain a Rotarian's membership and contribution history. Duplicate accounts should be reported to The Rotary Foundation as outlined above.
- **Name:** Listed are all constituents associated with a Rotary club. Please note that name prefixes and titles do not appear on the report, eg.: Mr./Mrs./Ms.
- **Club Member:** This column states whether the person is a Rotarian in the Rotary club under which his/her name appears. Y = Active Member, H= Honorary Member, N = Non-Rotarian.
- **Recognition Amount:** The total Paul Harris Fellow recognition credited to an individual's account. Recognition may be achieved with one's personal contributions to the Foundation, a contribution made on behalf of the account holder, or a transfer of Foundation Recognition Points from a Rotary club, district, or another individual. (Note: gifts to the Endowment Fund are not eligible for Paul Harris Fellow recognition and are not included in this column). For confidentiality reasons, this report will not display recognition amounts greater than 9,000.

• **Current PHF Level:** Recognition levels are determined based on the following guidelines:

<u>Recognition Amount</u>	<u>PHF Levels</u>	<u>Pin donor or recipient is eligible to wear</u>
1,000 to 1,999.99	PHF	original PHF pin
2,000 to 2,999.99	PHF+1	one sapphire
3,000 to 3,999.99	PHF+2	two sapphires
4,000 to 4,999.99	PHF+3	three sapphires
5,000 to 5,999.99	PHF+4	four sapphires
6,000 to 6,999.99	PHF+5	five sapphires
7,000 to 7,999.99	PHF+6	one ruby
8,000 to 8,999.99	PHF+7	two rubies
9,000 to 9,999.99	PHF+8	three rubies

Paul Harris Fellow recognition is applicable only to individuals. An organization can be recognized upon request with a Certificate of Appreciation when its Recognition Amount reaches \$1,000.

- **PHF Date:** Indicates when the account holder became a Paul Harris Fellow.
- **Foundation Recognition Points:** Awarded in appreciation for personal contributions from an individual or organization. Foundation Recognition Points may be transferred to other individuals to help them achieve their first or multiple PHF recognition. Starting in October 2011, points accumulate 1:1 for every dollar contributed (Note: gifts to the Endowment Fund are not eligible for Paul Harris Fellow recognition and are not included in this column).
- **Last Contribution Date and Designation:** Displays month and year of most recent contribution and indicates the designation (Program Fund). Anonymous contributions are excluded.
- **Benefactor:** Indicates that the individual who has given at least \$1000 in bequest to TRF. See full definition above.
- **Rotary Direct:** Indicates individuals who are enrolled in Rotary's recurring giving program (Rotary Direct) on a monthly, quarterly or annual basis.