

District 7360 Foundation Committee **Draft** Three Year Strategic Plan

revised 2021/10/10

Summary/Overview

1. Increase Annual Fund support from District Rotarians
2. Increase Polio Plus Support
3. Increase and Improve District Community Grant Participation
4. Broaden Participation in Global Grants
5. Improve Awareness of the District Foundation Committee and Cultivate Future Leadership
6. Cultivate Estate Gifts
7. Support Combination of Foundation Dinner with District Conference (for at least 2022-23 and 2023-24)

Strategy, Goals, Implementation Plan and Responsible Parties

Increase Annual Fund support from District Rotarians

Responsible - District Foundation Committee

- 1. Reverse the trend of decreased per capita annual fund support, get back to \$100 per capita and then maintain in real (inflation adjusted) dollars**

Goal - 10% Increase per year until \$100 per Capita achieved; 3% per year after \$200 per capita reached

History

2017-18 - \$101.37

2018-19 - \$97.97

2019-20 - \$89.98

2020-21 - \$83.50

Targets

2021-22 Goal - \$91.85

2022-23 Goal - \$100.00

2023-24 Goal - \$103.00

- 2. Have Every Club set a (Non Zero) Annual Fund Goal in Rotary Club Central**

Responsible - Area Governors

History

2018-19 - 35/72 (48.6%)

2019-20 - 32/70 (45.7%)

2020-21 - 47/66 (71.2%)

2021-22 to date - 37/66 (56.1%)

Goal

2021-22 - 80% (52/65)

2022-23 - 90% (59/65) 45 of 66 as of 10/10/2021

2023-24 - 100%

- 3. Eliminate Annual Fund Non-Giving Clubs**

Responsible - District Governor-Elect

History

2017-18 - 5

2018-19 - 7

2019-20 - 8

2020-21 - 3

Goal

2021-22 - 0 29 as of 10/10/2021

2022-23 - 0

2023-24 - 0

Strategies

- 1. Encourage every club to either hold or participate in at least one event to support the Rotary Foundation every six months**

Four district wide Foundation events currently offered (two each six months) -

World's Greatest Meal, District Foundation Dinner, Foundation Walk and Pedals Out Polio

Quarterly list all Club Foundation events in District Newsletter and on District Website

2. **Improve accessibility of information on Foundation Events**
Reformat District Website to Include Page for Foundation Support - Youth Exchange Tab could be relabeled Youth and include Youth Exchange, RYLA and 4 Way Speech Contest, allowing current District Program tab to be used for District Events supporting the Foundation as well as recognition and potential Foundation Minutes
3. **Increase Recognition of Annual Fund Support**
 - Quarterly publish list of Per Capita Giving by Clubs (in ranked order) on District Website and in District Newsletter
 - Publish participation in District wide events
 - Ranked Club per capita support of World's Greatest Meal
 - Ranked Club per capita support of Foundation Walk
 - Ranked Club per capita support of Pedals Out Polio
 - Broaden Recognition of Clubs and Members at District Foundation Event
 - Program Insert listing Top Clubs in Each Category, Paul Harris Society members, Bequest Society Members;
 - Publish Insert on District Website
 - Publish List of new Paul Harris Fellows each month in District Newsletter
 - Encourage clubs to recognize their new Paul Harris Fellows
 - Encourage each club to recognize Foundation Supporter of Year
4. **Encourage Clubs to Have a Foundation Minute at least once/month;** post possible "Foundation Minutes" on District website and in District Newsletter and distribute by e-mail. Foundation minutes could be given at meeting and or included in Club Newsletter/Meeting notes
 - Responsible for Posting Possible Foundation Minutes on District Website – ???
 - Responsible for Submitting Foundation Minutes to District Newsletter – ???
 - Area Governors to Provide Quarterly Report on Club Compliance
5. **Make a (non-zero) Annual Fund Goal a Requirement to Apply for a District Community Grant**
6. **Promote Rotary Direct**
 - Twice a year print ranked list of Rotary Direct participation (by percent of members) by Club in District Newsletter
7. **Ask every club to identify a Foundation lead and encourage larger clubs to have a Foundation Committee**

Measurements of Success

1. Club Annual Fund Participation
2. EREY participation
3. Per Capita Giving
4. % of clubs having regular "Foundation Minutes" (monthly or more often)
5. % of clubs participating in or sponsoring events to support the Rotary Foundation
6. Rotary Direct Participation
7. Sustaining Members
8. Paul Harris Society
9. Participation in Foundation walk

Notes: 17 of the 66 current Club presidents made no donation to the Rotary Foundation during 2020-21; 7 of the 66 participate in Rotary Direct. Only 23 clubs have listed a Foundation lead and six of these 23 did not make a 2020-21 gift

Increase PolioPlus Support

History

2020-21	\$	46,225.50
2019-20	\$	84,994.72
2018-19	\$	2,277,971.66
2017-18	\$	72,674.10
2016-17	\$	5,055,383.79
2015-16	\$	74,069.60
2014-15	\$	68,995.92
2013-14	\$	61,424.32
2012-13	\$	78,996.40

1. Increase participation in World's Greatest Meal History (Need from Jeff)
2. Increase participation in Pedals Out Polio History (Need from Jeff)
3. Increase participation in Polio Plus Society
52 Members as of August 8, 2021

Goal

By June 30, 2022 - 100

June 30, 2023 - 110

June 30, 2024 - 120

Strategies

Promotion and regular reporting in Newsletter
Presence at PETS, DTA, DC
Foundation Dinner Powerpoint, Program Insert

Measurements of Success

Per capita

Polio Plus Society

Increase and Improve District Community Grant Participation

1. Offer District Grant Seminars at a Variety of Times both Virtually and In Person
2. Make Final Reports less bureaucratic without sacrificing accountability/
 - Strengthen statement certifying club contributed at least the amount requested from/approved by District
 - Accept copy of check or bank statement with check identified or invoice or receipts AND either letter of thanks from organization or photos of completed project. (Some clubs have bank accounts that do not provide digital images of check and have to pay for copies of checks. Many organizations do not provide zero invoices. Some projects involve more than one organization/school district.
3. Allow for Summer Projects : Clubs would have to remit total estimated cost of project to organization which would have to attest in writing to receiving entire payment needed for the purpose of project to be completed by September 1.

Broaden Participation in Global Grants

Traditionally no more than five District clubs participate in a Global Grant each year. (This includes clubs who supporting projects in a previous year that are not yet complete.)

1. Ask each club to contribute at least \$1,000 for a Global project at least once every five years

Goals

2021-22	10 clubs
2022-23	15 clubs
2023-24	20 clubs
2024-25	25 clubs

Improve Awareness of the District Foundation Committee and Cultivate Future Leadership

Post Committee Meeting Minutes to District Website

Provide an overview of the Committee and its projects as part of PETS

3 Minute Overview of Committee and its Projects at District Foundation Dinner

Cultivate Estate Gifts

Short Presentation at Foundation Dinner on Estate Planning for PHS Members

Create a subcommittee to identify and arrange individual appointments with potential donors in coordination with RI Major Gift Officer

Support Combination of Foundation Dinner with District Conference (for at least 2022-23 and 2023-24)