

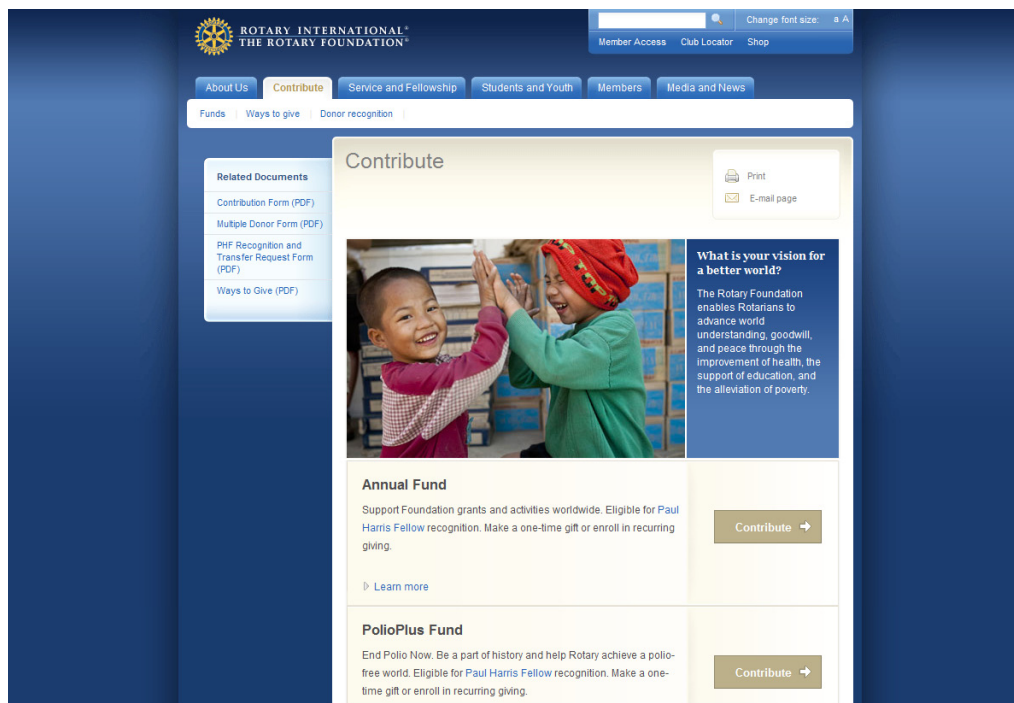
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FUNDRAISING



Rotary Foundation activities would not be possible without the financial support of Rotarians and friends. Giving to The Rotary Foundation is now easier than ever. The online system at www.rotary.org has been updated and simplified, and now accepts one-time and recurring contributions in multiple currencies. Giving online is more efficient, cost effective, and secure. Go to www.rotary.org/en/contribute.

The fundraising subcommittee oversees the district's fundraising strategy and helps clubs set and achieve their contribution goals for the Annual Fund, the Permanent Fund, and the PolioPlus Fund.



ANNUAL FUND

The Annual Fund is the primary source of support for Foundation grants and programs each year. As district Rotary Foundation committee members, you are asked to promote recurring annual contributions to The Rotary Foundation through the Every Rotarian, Every Year initiative, which encourages every Rotarian to participate in a Foundation project and contribute to the Foundation's Annual Fund every year.

By encouraging every Rotarian to make an annual contribution, the committee

- » Promotes the Foundation's many successes
- » Supports the local and international service projects developed by Rotarians



Rotary Reminder

Once the governor has reported appointments to RI, the Rotary Foundation committee chair and the chairs of the annual giving and fundraising subcommittees, can view district contribution and recognition reports in Member Access at www.rotary.org.



Rotary Reminder

For news stories and updates on the Annual Fund, sign up for the [Every Rotarian Every Year Newsletter](#).

- » Educates Rotarians on the Foundation's operations
- » Motivates Rotarians to participate in Foundation activities

Annual Fund gifts can be directed to SHARE, the World Fund, or an area of focus fund. All options are available for one-time or recurring contributions.

SHARE is the primary source of funding for Rotary Foundation programs. It is also the only Annual Fund designation that generates funding for the District Designated Fund. Rotary districts use DDF to pay for the Foundation activities in which the clubs and district choose to participate.

World Fund contributions provide the Foundation's portion of funding for approved grants and other program support. The Trustees manage these funds and make them available for packaged grants and the matching portion of global grants.

Areas of focus contributions provide the Foundation's portion of funding for activities addressing critical humanitarian issues and needs. Annual Fund contributions directed to any of the six areas of focus are included toward a club's annual giving goal and per capita calculations. They also are eligible for all Annual Fund recognition opportunities (Every Rotarian, Every Year; Rotary Foundation Sustaining Member; Paul Harris Fellow; Paul Harris Society; Major Donor; and Arch C. Klumph Society) and count toward all club recognition opportunities.

Area of focus-designated contributions are not included in a district's SHARE calculation and do not generate DDF. Because Annual Fund-SHARE contributions are the primary source of funding for Foundation programs, SHARE-designated contributions from every Rotarian, every year remain crucial.

PERMANENT FUND

The Permanent Fund is the Foundation's endowed fund. Gifts are never spent. Contributions to the Permanent Fund are invested to preserve and grow the principle, only a portion of the earnings generated are used currently to support Foundation activities supporting Rotary's highest priorities, including global and packaged grants and the Rotary Peace Centers. The Foundation has set a goal of US\$1 billion in Permanent Fund assets by 2025, ensuring the Foundation has the ability to meet future needs.

Contributions to the Permanent Fund often take the form of major outright gifts, such as endowed funds, bequests, or life-income agreements. Because contributions to the Permanent Fund can be complex, subcommittee members should work closely with your regional Rotary Foundation coordinator.

POLIOPLUS FUND

Money that is contributed to the PolioPlus Fund is used solely for the purpose of achieving the worldwide eradication of polio, and funds will be needed until that goal is achieved. Rotarians are encouraged to continue contributing to the PolioPlus Fund until worldwide polio eradication is certified.

Fundraising Goals

District fundraising goals for the year are the compilation of club goals submitted to The Rotary Foundation. District governors-elect collect club goals at the presidents-elect training seminar and forward them to The Rotary Foundation by 15 May each year. Clubs are asked to set goals for the Annual Fund and the Permanent Fund. The governor-elect and district Rotary Foundation committee should work with clubs to determine challenging but achievable club goals. For 2013-14 fundraising goals, an online tool will be available in Member Access.

Start by asking clubs what they want to do in three years using District Designated Funds. Use these participation goals to determine how much the district must raise.

Track achievement of fundraising goals throughout the year. Consider using the recommended benchmarks below:

Date*	Goal Achievement
30 September	25%
31 December	50%
31 March	75%
30 June	100%
*Based on Rotary year (1 July-30 June)	

Monthly contribution reports and EREY eligibility reports are available on Member Access, including assistance on reading these reports.

The district should help clubs set the following goals:

- » Reaching US\$100 per capita. If the district is already at \$100 per capita, consider a percentage increase. If the district is less than \$100 per capita, consider ways to reach the \$100 level.
- » Increasing the number of Rotary Foundation Sustaining Members, Paul Harris Fellows, Benefactors, or Bequest Society members.
- » Planning at least one public fundraiser in support of Rotary's polio eradication efforts or one of the areas of focus.
- » Identify, cultivate, and solicit a specific number of potential donors capable of contributing major gifts of \$10,000 or more.

Goals may be stated as a monetary amount or by participation, such as:

- » 100% club participation
- » Establishing a Paul Harris Society
- » Number of new major gifts
- » Number of new Benefactors
- » Number of new Bequest Society members

Fundraising Initiatives

The Rotary Foundation has three major fundraising campaigns. Each campaign is unique and should be targeted to different donors depending on their interests and financial resources.

Fundraising Initiative	Fund/Program	Purpose	Goal (US\$)	Date of Completion
Every Rotarian, Every Year	Annual Fund	Provides on-going support today	Determined annually in June	30 June annually
Permanent Fund Initiative	Permanent Fund	Helps secure Rotary's response to the pressing needs of tomorrow	\$1 billion	2025
Rotary Peace Centers Major Gifts Initiative	Rotary Peace Centers	Creates an endowed fund for the Rotary Peace Centers program	\$95 million	2015

The Rotary Foundation recognizes that fundraising approaches must be appropriate to the customs and culture of the countries involved. Please adapt the following suggested types of gifts and commitments as needed. Fundraising on behalf of The Rotary Foundation is most successful when conducted person to person. The Foundation belongs to all Rotarians and every Rotarian should have the opportunity to support its grants and programs.

Types of Giving Opportunities

Donors can choose from a variety of contribution options. Every donor is unique, so take the time to cultivate prospective donors and to help them determine the option that works best.

NAMING OPPORTUNITIES

Term Gift

A term gift is established for a specific program and is spent in its entirety within a short period of time. A term gift can be created by an individual, a corporation, or a foundation in the name of the donor or someone the donor chooses to honor. Term gifts are not eligible for World Fund match but are available to spend immediately.

Endowed Funds

With gifts of US\$25,000 and above, a donor can set up an endowed fund that bears their name or a loved one's name. Endowed funds can exist as individually estab-

lished funds or as pooled funds (smaller contributions under \$25,000 combined by a common purpose) that reside within the Permanent Fund along with all other contributions. In addition to SHARE and World Fund, endowed funds can be created for Rotary Foundation global grants and the Rotary Peace Centers.

Creating an endowed fund for a global grant gives donors the opportunity to support one of the areas of focus, a district, or a region. For example, \$250,000 can establish the Joe and Jane Smith Endowed Fund for disease prevention and treatment in District 0001.

Major gifts of \$50,000 or more are being sought for Rotary Peace Centers endowed funds; however, gifts of any amount are accepted and appreciated.

Rotary Foundation Global Grants Endowed and Term Naming Opportunities

All endowed funds in the chart are established within the Permanent Fund. Gifts are tracked individually and named after the donor or at their discretion.
All amounts shown in US\$

Endowed Fund

- » \$25,000 (minimum) from which spendable earnings can be directed either to SHARE or the World Fund.
- » \$100,000 to support an area of focus.
- » \$250,000 to support an area of focus and specify a district to participate.
- » \$500,000 to support an area of focus, and specify a district to participate and the location.

- » \$1,000,000 for an individually crafted endowed fund, including the possibility of specifying a particular country's participation in an area of focus, or a district's participation in a global grant.

Term Gifts

- » \$15,000 or more to an area of focus.
- » \$30,000 or more to an area of focus and may designate a district to participate.

Rotary Peace Centers Opportunities Endowed and Term Naming

All amounts shown in US\$

Endowed Fund

- » \$50,000 bears the donor's name and provides general support to the program.
- » \$100,000 funds annual seminars at a Rotary Peace Center.
- » \$250,000 funds one certificate-program fellow approximately every year.
- » \$500,000 funds a fellow every three to four years or when sufficient spendable earnings have accrued.

- » \$750,000 funds a fellow every other year or when sufficient spendable earnings have accrued.
- » \$1,000,000 funds a visiting lecturer to teach courses and serve as a mentor for fellows.
- » \$1,500,000 funds a fellow every year.

Term Gifts

- » \$75,000 pays for one fellowship

For more information establishing an endowed fund, contact your regional Rotary Foundation coordinator or a Planned Gifts or Major Gifts officer at The Rotary Foundation.



Around the World

In North America, many companies have programs to match their employees' charitable contributions. Some companies match gifts made by retired employees, nonemployee directors, and spouses of employees. If a Rotarian's company does not have such a program, its human resources department can be encouraged to establish one.



Around the World

In the United States, donors often receive tax benefits from contributions of publicly traded securities and other noncash items (including real estate). If you have questions about noncash contributions or other gift planning opportunities, please direct them to [Fund Development staff](#).



Around the World

Regional Permanent Fund committee members in Europe and RIBI, India, Japan, Korea, Taiwan, Macau and Hong Kong, and Latin America are an excellent resource for the Permanent Fund and fundraising subcommittees.

MEMORIAL AND TRIBUTE GIFTS

Memorial and tribute gifts may be directed to the Annual Fund, PolioPlus Fund, or Permanent Fund. A contribution to The Rotary Foundation is a meaningful way to honor or memorialize a loved one. Tribute gifts can be a perfect way to mark a birthday, wedding, or holiday/special occasion.

CORPORATE/FOUNDATION GIFTS

Corporate/foundation gifts may be directed to the Annual Fund, PolioPlus Fund, or Permanent Fund. In each district there are many corporations and foundations. Corporate or foundation contributions can help you achieve your district's Annual Fund goal. One way that these gifts can be pursued is challenge grants, used by many foundations. This grant is a pledge to augment or match a set amount raised by a club or district within a specific time frame.

For small or matching gifts, The Rotary Foundation can provide sample proposal letters, which the club or district can tailor to the organization's interests. For larger gifts, the Foundation's Fund Development staff can work with local Rotarians to develop proposals that meet the donor's interests.

Before approaching a corporation or a foundation, contact The Rotary Foundation to avoid duplicating efforts.

GIFT PLANNING

Donors may wish to plan their giving to The Rotary Foundation to obtain the best tax benefits, financial security now and into the future, and advantageous use of resources. Gift planning involves establishing an agreement or commitment during a donor's lifetime that benefits the Foundation in the future, usually at the death of the donor and/or certain other beneficiaries designated by the donor.

Bequests. A bequest is the most recognizable form of planned gift. Cash, securities, real estate, or property may be given to The Rotary Foundation through an individual's will or estate plan. The donor retains full control and use of the gift during his/her lifetime. When the will is probated, the gift to the Foundation may qualify for a charitable deduction in computing estate taxes.

Life income agreements. This is a popular option in the United States. The donor makes a contribution but retains a present interest in the assets (for example, annual payments) and directs the remainder for the ultimate benefit of the Foundation. In addition, the donor may receive a reduction of taxes on income, capital gains, and estate assets. Life income agreements benefit the Permanent Fund. For specific questions, contact the Fund Development staff at plannedgiving@rotary.org. A brief overview of the most common life income agreements follows:

1. **Charitable gift annuity.** In exchange for an irrevocable transfer of US\$10,000 or more, The Rotary Foundation will guarantee annual payments to one or two people designated by the donor. There is an immediate charitable receipt for U.S. income tax purposes, and a portion of the annual payments returned may be free from income tax.

A deferred charitable gift annuity postpones the start of annuity payments for at least one year. This provision offers a younger donor an opportunity to take advantage of the possible immediate tax benefits while planning for retirement. The minimum age for the beneficiary is 50.



Around the World

The tax and estate planning examples here are generally based on U.S. tax laws. Some countries permit comparable types of gift planning with benefits. All donors are encouraged to seek professional legal, estate planning, and financial advice.

2. **Pooled income fund.** Gifts of cash, securities, or both at a minimum of US\$5,000 are combined in The Rotary Foundation Pooled Income Fund for investment with those of many other people, similar to a mutual fund. The donor (and/or income beneficiary) receives a proportionate share of the earnings for life, a charitable receipt for U.S. income tax purposes, a possible reduction in capital gains tax, and reduced estate taxes, when applicable. The minimum age for the beneficiary is 50.
3. **Charitable remainder trusts.** The donor transfers a minimum of US\$100,000 in money, property, or both to trust with The Rotary Foundation as trustee, which invests the assets in a separate fund. The donor receives either a variable income (unitrust) or a fixed dollar amount (annuity trust). This type of gift may reduce capital gains tax on donated appreciated assets and provides a U.S. charitable receipt for immediate income tax purposes. The minimum age for the beneficiary is 50.

Life insurance. A donor may name The Rotary Foundation a beneficiary of the proceeds of any life insurance policy. A donor may assign ownership of certain new or existing life insurance policies to The Rotary Foundation. Because there are many types of life insurance policies, donors wishing to make such a gift should first contact the Foundation's Fund Development Gift Administration staff for detailed guidelines on the acceptance and recognition of life insurance policies. When ownership of a policy is properly transferred according to The Rotary Foundation Gift Acceptance Policy, the donor may receive an income tax deduction for the value of the policy at the time the gift is made and for subsequent premium payments.

Retained life estate in a residence or farm. The owner of a residence or farm may give the property to The Rotary Foundation, claim a U.S. income tax deduction for the charitable remainder, and retain use of the property personally and/or for someone else. A portion of the residence or farm value may be excluded from estate tax.

Lead trust. The donor establishes and funds a trust that is written for a term of years and is designed to provide a fixed percentage of income to The Rotary Foundation until termination. At trust termination, the trust assets revert to the donor, donor's beneficiary, or donor's estate with substantial tax benefits. If the trust reverts to certain heirs, tax on the transfer may be eliminated completely.

Donor Advised Funds (USA only)

Rotarians, Rotary clubs, and districts can support The Rotary Foundation and other charitable organizations of their choice through The Rotary Foundation Donor Advised Fund. An individual or Rotary-affiliated group donor can establish a donor advised fund account at The Rotary Foundation, then recommend grants to fund Foundation activities or other approved charitable organizations. The Foundation handles the administration, investment, and accounting for the fund. It is a great alternative to forming a separate foundation.





A minimum initial contribution of \$10,000 is required, and additional contributions must be at least \$1,000. Cash, mutual fund shares, stocks, bonds, and other securities can be transferred into the fund. Grant distributions from a donor advised fund are made on the recommendation of the donor with agreement of The Rotary Foundation. The minimum amount for grant distributions is \$250.

Each donor advised fund is invested separately and professionally managed, offering the potential for contributions to grow and result in larger charitable gifts. For more information, contact The Rotary Foundation at plannedgiving@rotary.org.



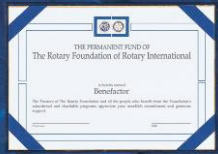

Donor Recognition and Appreciation Opportunities

The Rotary Foundation welcomes opportunities to show its appreciation to individuals and clubs for personal outright contributions supporting its grants and programs. The following chart outlines available recognition.





INDIVIDUAL RECOGNITION OPPORTUNITIES

<p>ROTARY FOUNDATION SUSTAINING MEMBER</p> <p>A Rotary Foundation Sustaining Member (RFSM) is an individual who personally contributes US\$100 or more each year to the Annual Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition. Contact your Rotary club president to obtain the annual Sustaining Member badge sticker in appreciation of this achievement.</p>	
<p>PAUL HARRIS FELLOW</p> <p>Paul Harris Fellow recognition is given in appreciation to anyone who contributes (or in whose name is contributed), a gift of US\$1,000 or more cumulatively to the Annual Fund, PolioPlus, or an approved Foundation grant. The recognition consists of a certificate and pin. An optional medallion is available for \$15.</p>	
<p>CERTIFICATE OF APPRECIATION</p> <p>Occasionally, a donor contributes US\$1,000 and wishes to recognize a business or organization. In these instances, a Certificate of Appreciation is given instead of Paul Harris Fellow recognition, which is only for individuals.</p>	
<p>MULTIPLE PAUL HARRIS FELLOW</p> <p>Multiple Paul Harris Fellow recognition is extended at subsequent \$1,000 levels. Recognition consists of a pin with additional stones corresponding to the recipient's recognition amount.</p>	
<p>PAUL HARRIS SOCIETY</p> <p>The Paul Harris Society is a district-administered recognition for those who elect to personally contribute US\$1,000 or more each year to the Annual Fund, PolioPlus, or an approved Foundation grant. Individual districts handle all associated recognition for this program, and inquiries should be directed to the district. Paul Harris Society contributions count toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition.</p>	

INDIVIDUAL RECOGNITION OPPORTUNITIES (CONTINUED)

<p>MAJOR DONOR</p> <p>The Rotary Foundation recognizes individuals or couples whose combined personal giving has reached US\$10,000, regardless of the gift designation. Major Donors may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level.</p>	<p>US\$ 10,000 to 24,999.99 – Level 1 25,000 to 49,999.99 – Level 2 50,000 to 99,999.99 – Level 3 100,000 to 249,999.99 – Level 4</p>	
<p>ARCH C. KLUMPH SOCIETY</p> <p>Donors who contribute US\$250,000 or more become members of the Arch C. Klumph Society. Portraits, biographies and in some cases video clips are housed in the Interactive AKS Gallery, one of which is housed on the 17th floor of World Headquarters and another that travels to Rotary events internationally. Members also receive special lapel pins and pendants, signed certificates and invitations to exclusive AKS events held worldwide. New members are invited to a special induction ceremony at World Headquarters.</p>	<p>Trustees Circle US\$ 250,000 to 499,999.99</p> <p>Chair's Circle 500,000 to 999,999.99</p> <p>Foundation Circle 1,000,000 and above</p>	
<p>BENEFACTOR</p> <p>A Benefactor is someone who informs The Rotary Foundation in writing that he or she has made a provision in his/her estate plans for The Rotary Foundation or by making an outright gift of US\$1,000 or more to the Permanent Fund. Benefactor recognition consists of a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin.</p>		
<p>BEQUEST SOCIETY</p> <p>The Rotary Foundation recognizes couples or individuals who have made commitments in their estate plans totaling US\$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and a pin commemorating the commitment at each new recognition level.</p>	<p>US\$ 10,000 to 24,999.99 – Level 1 25,000 to 49,999.99 – Level 2 50,000 to 99,999.99 – Level 3 100,000 to 249,999.99 – Level 4 250,000 to 499,999.99 – Level 5 500,000 to 999,999.99 – Level 6 1,000,000 and above – Level 7</p>	

CLUB RECOGNITION OPPORTUNITIES

<p>EVERY ROTARIAN, EVERY YEAR CLUB</p> <p>This banner is awarded to clubs that achieve a minimum US\$100 per capita and 100 percent participation with every active member contributing some amount to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year.</p>	
<p>100% PAUL HARRIS FELLOW CLUB</p> <p>To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time banner recognition is requested. In addition to the banner, the club's name is included on the list of 100% Paul Harris Fellow Clubs available at www.rotary.org. This one-time only banner recognition is awarded throughout the Rotary year.</p>	
<p>100% ROTARY FOUNDATION SUSTAINING MEMBER CLUB</p> <p>Rotary clubs must achieve a US\$100 per capita and every active member of the club must personally contribute \$100 or more to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year and is based on active membership as of 30 June</p>	
<p>TOP THREE PER CAPITA IN ANNUAL FUND GIVING</p> <p>Banners are given to the top three per capita giving clubs in each district. To be eligible, clubs must achieve a minimum US\$50 per capita in <i>annual giving</i>. This banner recognition is awarded at the conclusion of the Rotary year.</p>	

FOUNDATION RECOGNITION POINTS

Recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, PolioPlus, or World Fund, or as a sponsor portion to a Foundation grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Foundation recognition points can be transferred by the donor to others to help them become or name them as a Paul Harris Fellow or Multiple Paul Harris Fellow.

Gifts to the Permanent Fund do not earn recognition points, but may qualify toward Arch C. Klumph Society membership, major donor recognition, benefactor recognition, or Bequest Society membership.

SPECIAL FUNDRAISING EVENTS

Districts and clubs use special events to raise funds for The Rotary Foundation, such as district conferences, Foundation seminars, and other special events recognizing individuals and couples who have made substantial contributions or provided outstanding service to Rotary.

Special events may be targeted to Rotarians and their spouses, while others may be developed to involve those outside Rotary and promote the Foundation. Consider these ideas and other appropriate ways to thank donors:

- » Ask permission to print the donor's name in club or district communications.
- » Arrange a special program to publicly recognize the donor (e.g., recognition presentation or dinner for a Paul Harris Fellow or Benefactor).
- » Call the donor to personally express thanks for the gift.
- » Provide the donor with updates on the district's Foundation activities.

Some Rotary clubs also use Paul Harris Fellow recognition to honor local, national, or world leaders who have demonstrated commitment to The Rotary Foundation's goals and purposes. These recognitions serve three purposes: They honor a deserving individual, give important support to The Rotary Foundation programs, and bring Rotary favorable public attention.

Clubs sometimes make contributions to recognize a member's service or outstanding success in a specific project. There are also Foundation service awards specifically designed for that purpose (see Chapter 3: Administration).

The Rotary Foundation respects donors' requests to remain anonymous and avoid public recognition, but appreciates the opportunity to thank them publicly for their generous contributions when desired. Such public recognition often encourages others to consider similar gifts. The Rotarian responsible for coordinating the recognition presentation should make the recognition request to the Foundation. Suggested presentation remarks are provided by the Foundation to the Rotarian or club president when the recognition items are mailed or upon request.



Rotary Reminder

Fundraising subcommittee chairs can obtain the Club Recognition Summary through Member Access. The summary includes information on Benefactors, names of Paul Harris Fellows, and all-time contributions. Refer to [Using the Club Recognition Summary](#) for information on how to use the report.

Fundraising Tips for Major and Estate Gifts

1. **Information is key.** People give to Rotary when they know the specifics of what we are accomplishing around the world — tout your district's success in writing, in person, and on the Web to attract new donors.
2. **Everyone has a different motivation for giving.** Take the time to learn more about an individual's experiences and desires — using the same approach for everyone is less effective and can miss significant donors.
3. **You can never say thank you enough.** Stay in touch after you say thanks the first time — what you or your district says or does the next month and next year influences whether another gift or bequest is made to the Foundation.
4. **Help is available.** Use the district and Foundation resources available to you as described in this document. Build and support your district team by working with the Foundation's Annual Giving, Major Gifts, and Planned Giving teams assigned to your zone.

Fundraising Resources

Additional fundraising and recognition resources can be found at shop.rotary.org and at www.rotary.org/contribute.