



# The Rotary Foundation

Hang Cassens & Jean Hawkins, Presenters  
Rotary Club of Elk Grove  
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# LEARNING OBJECTIVES



## **We will cover 3 main topics**

1. How the Rotary Foundation Works
2. How to Log In to My Rotary account and review activities
3. Review Giving Options





# Part 1: How the Rotary Foundation Works

## MISSION STATEMENT



“To enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education and the alleviation of poverty.”

# FOUNDATION AREAS OF FOCUS



## AREAS OF FOCUS

Projects that receive Global Grant funds from The Rotary Foundation should fall under at least one of the following:



Peace and conflict prevention/resolution



Disease prevention and treatment



Water and sanitation



Maternal and child health



Basic education and literacy



Economic and community development



Doing Good In The World



EVERY  
ROTARIAN  
EVERY  
YEAR

Supports efforts through:

Global Grants

District Grants



# DISTRICT GRANTS

- Small-scale, short-term
- Local or international activities
- Aligned with the Foundation's mission
- Single grant awarded annually

*Example: HART (**H**omeless **A**ssistance **R**esource **T**eam)*





# GLOBAL GRANTS

- Large, long-term projects
- Sustainable, measurable outcomes
- Alignment with areas of focus
- International partnership
- World Fund match

*Example: Kenya primary school – provide toilet facilities and electricity*















## Part 2: How do the Foundation Grants and Matching Grants work?

# THERE ARE 3 FUNDING SOURCES YOU NEED TO KNOW

1) Individual/ Club Cash	 or  Rotary Elk Grove Foundation	<p><b>Individual</b> – Cash/checks to Rotary Foundation, contributions to red bucket during meetings</p> <p><b>Elk Grove Rotary Foundation</b> – Board votes to approve funds as a club, team up with other clubs for various projects</p>
District Grants 2) DDF (District Designated Fund)		<ul style="list-style-type: none"><li>✓ Small-scale, short-term</li><li>✓ Local or international activities</li><li>✓ Aligned with the Foundation's mission</li><li>✓ Single grant awarded annually</li></ul>
Global Grants 3) FWF (Foundation World Fund)	 The Rotary Foundation	<ul style="list-style-type: none"><li>✓ Large, long-term projects</li><li>✓ Sustainable, measurable outcomes</li><li>✓ Alignment with areas of focus</li><li>✓ International partnership</li><li>✓ World Fund match</li></ul>







# HOW DOES THE **MATCHING GRANT** WORK?

Contributors	Contribution value	Foundation Contribution Match
<b>Individual/ Club Cash</b>  Elk Grove Foundation 	<b>\$1</b>	
<b>DDF (District Designated Fund)</b> 		<b>\$1</b> (District funds is matched at 100%)
<b>FWF (Foundation World Fund)</b> 	(value in 3 years)	<b>\$1.50</b> (Foundation matches DDF 100% + 50% for cash)
All contributors together	<b>\$3.50</b>	<b>\$3.50</b> (individual/ Elk Grove Rotary Foundation contribution + DDF + FWF)



# MATCHING **Global** GRANT EXAMPLE: **IRURI PRIMARY SCHOOL**

Contributors	Contribution value	Example: Iruri Primary School Project in Kenya
<b>Individual/ Club Cash</b>  		<b>\$10,000.00</b>
<b>DDF (District Designated Fund)</b> 	<b>100% match</b>	<b>\$10,000.00</b>
<b>FWF (Foundation World Fund)</b> 	<b>Foundation matches DDF 100% + 50% for cash)</b>	<b>\$15,000.00 (value in 3 years)</b>
<b>All contributors together</b>		<b>\$35,000.00</b>



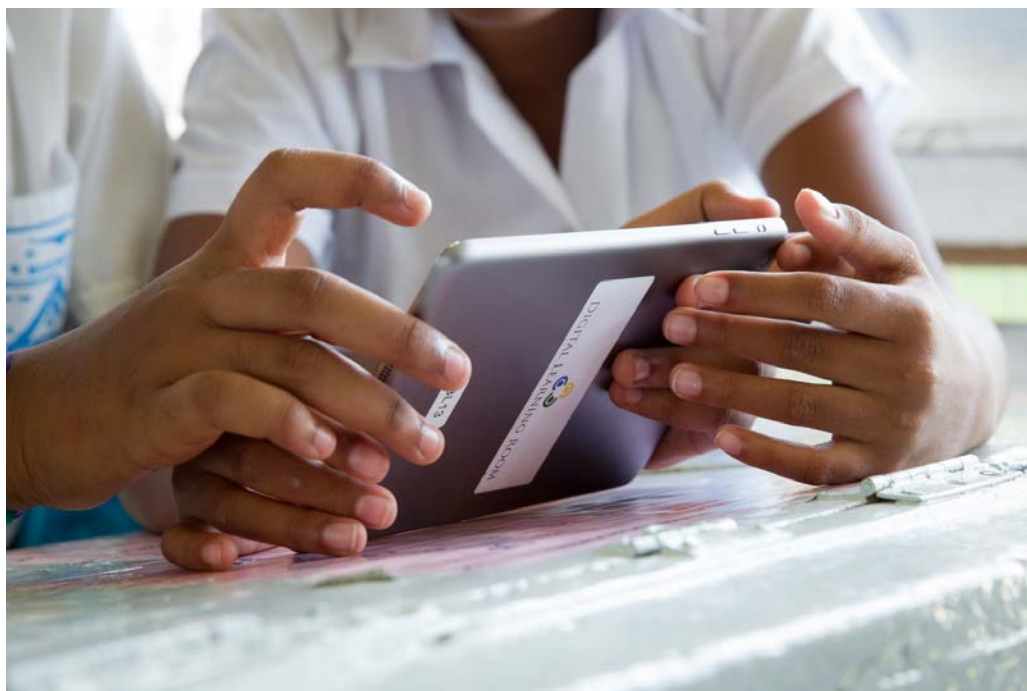


## Part 3: My Rotary website

Making this site meaningful and powerful for members

# WHAT DOES **MY ROTARY** WEBSITE DO?

**URL:** <https://www.rotary.org/myrotary/en>



**Provides pretty much everything you need to know, including:**

- Track how much you have donated to Rotary Foundation
- Review Foundation Goals and Activities
- Review and track progress for Rotary Club of Elk Grove Goals
- Give to the Foundation
- ...and so much more!!





# LOGGING IN/ REGISTER

Step 1

Step 2  
Log in or create account

## CREATING A MY ROTARY ACCOUNT

Using any device browser, go to [Rotary.org](https://Rotary.org)

At the top right of the Rotary homepage click the menu button labeled MY ROTARY.

My Rotary Club Finder Location/Language

Already part of the Rotary family? Head over to [My Rotary](#) for more!

ROTARY.ORG > MY ROTARY | Sign in/Register

Now, at top left click the menu link MY ROTARY: Sign-in/Register. This takes you to a pop-up window which you can use to log-in or create an account. Click **Create Account**.

### SIGN IN

SIGN-IN EMAIL \*

Forgot email? [?](#)

PASSWORD \*

Forgot password? [?](#)

☐ REMEMBER ME [?](#)

SIGN IN

#### WHY CREATE AN ACCOUNT?

Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can re-register with their current user ID. For tips on registering and using the site, see our [website resources](#). For assistance, [contact us](#).

CREATE ACCOUNT

# CREATE AN ACCOUNT

The email address is usually the address you have on file with your club secretary, however, it could be a previous email you have used



**ACCOUNT REGISTRATION**

\*Required

FIRST NAME \*

LAST NAME \*

**SIGN-IN EMAIL \***

ARE YOU 18 YEARS OLD OR OLDER? \*

☐ YES

☐ NO

**CONTINUE**

# REVIEW MY ACCOUNT AND MY DONATIONS

## Review My Account

You can review your profile and make changes.

If unable to make changes, you can request the club secretary ([contact@elkgroverotary.org](mailto:contact@elkgroverotary.org)) to update your information on file with Rotary International.

### MY PROFILE

Building a profile lets other users know more about you so you can connect about projects and other needs.

GO TO PROFILE

### HANG CASSENS

PROFILE DELEGATION CONNECTIONS (0) MESSAGES (0) ACCOUNT SETTINGS

Reset all privacy settings: | [View your public profile](#)

#### PROFILE PHOTO



EDIT DELETE

[Individual Contribution Form](#)

[Rotary Workgroups](#)

[Recommendations](#)

[My Invitations](#)

[Credit card opt-out \(U.S. & Canada\)](#)

[Donor History Report](#)

#### CONNECTIONS

Set your privacy settings for who can see your connections.

#### GROUPS

Set your privacy settings for who can see your groups.

## Review My Donations

Generate Report to Review:

- what you have given
- how much you have given
- any recognition points you have

# DONOR HISTORY REPORT EXAMPLE



Figure 1: Example of a donor history report



**My Rotary  
website – let's  
do!**

**DEMO TIME**



## Part 4: Foundation Basics

### Understand

- where funds comes from
- where funds go
- how to give funds



# WHERE DOES ROTARY FOUNDATION **RECEIVE** FUNDING FROM?

## Annual Fund

For Support Today



## Foundation World Fund

To Secure Tomorrow



## Restricted Fund

To End Polio



**Sustaining Paul Harris**  
\$100/yr

**Paul Harris Fellow**  
\$1,000

**Paul Harris Society**  
\$1,000/yr to Restricted Fund

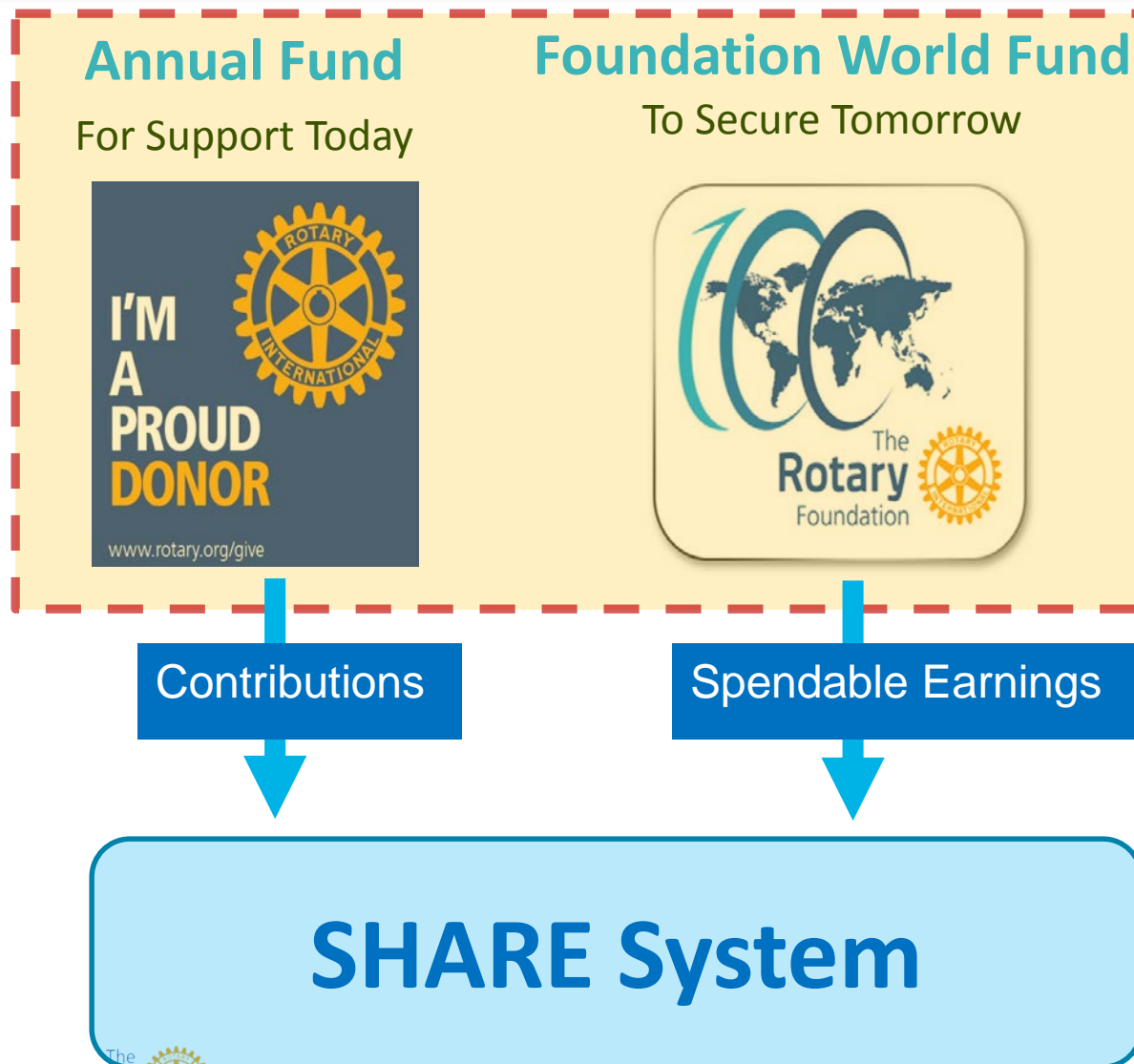
**Major Donor**  
\$10,000

**Bequest Society**  
\$10,000 Pledge

**Benefactor**  
\$1,000 Pledge to  
Endowment Fund

**Arch Klump Society**  
\$250,000

# HOW DOES ROTARY FOUNDATION **GIVE** FUNDING TO CLUBS AND DISTRICTS?

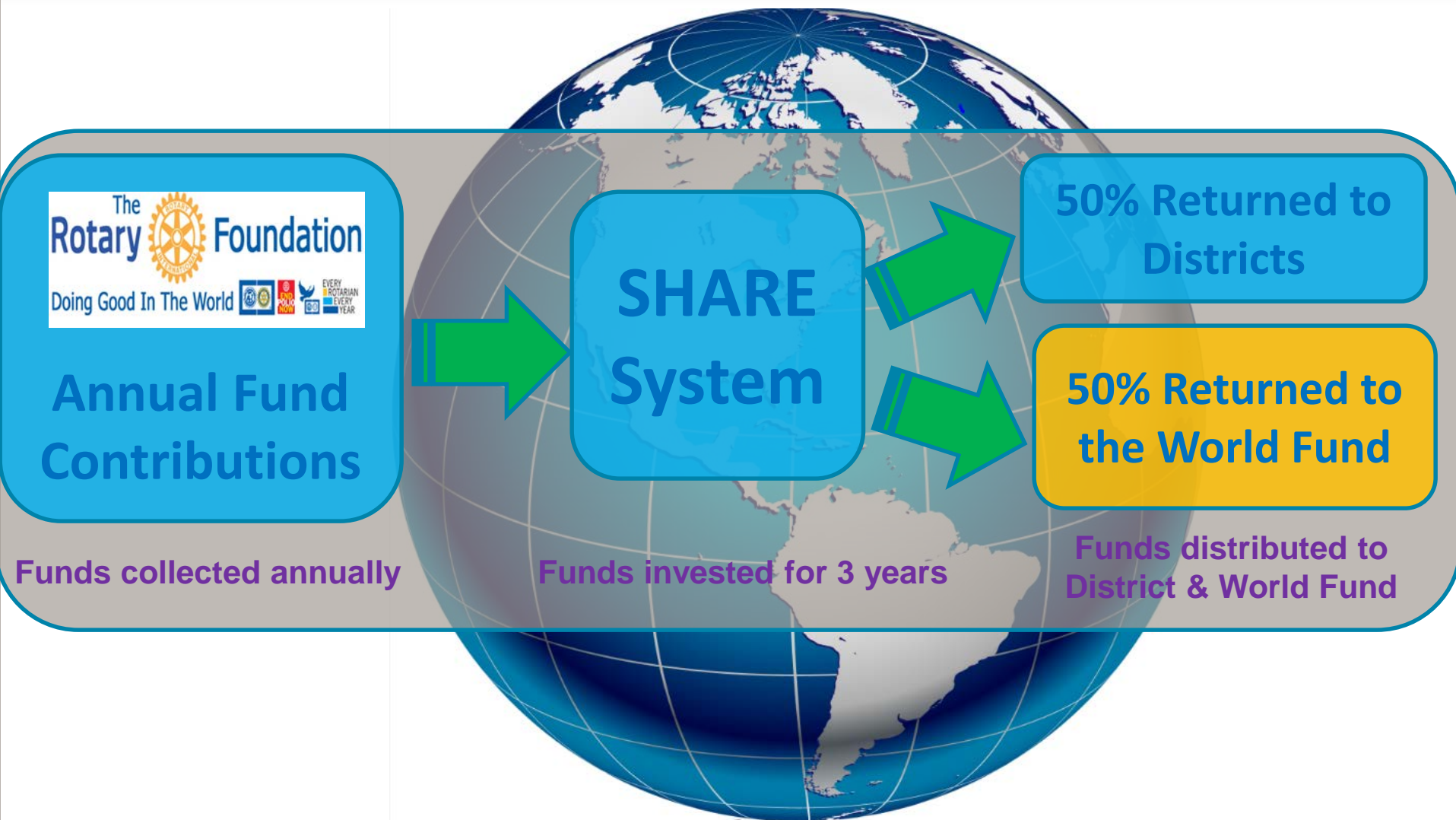


## Restricted Fund

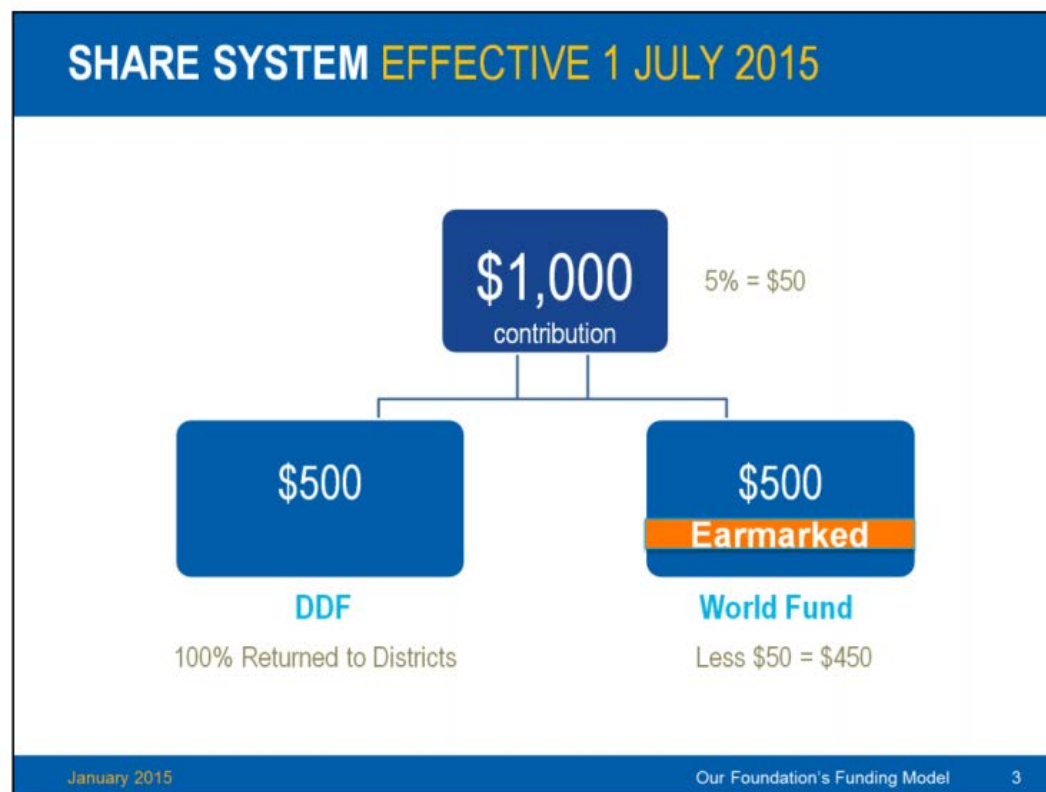
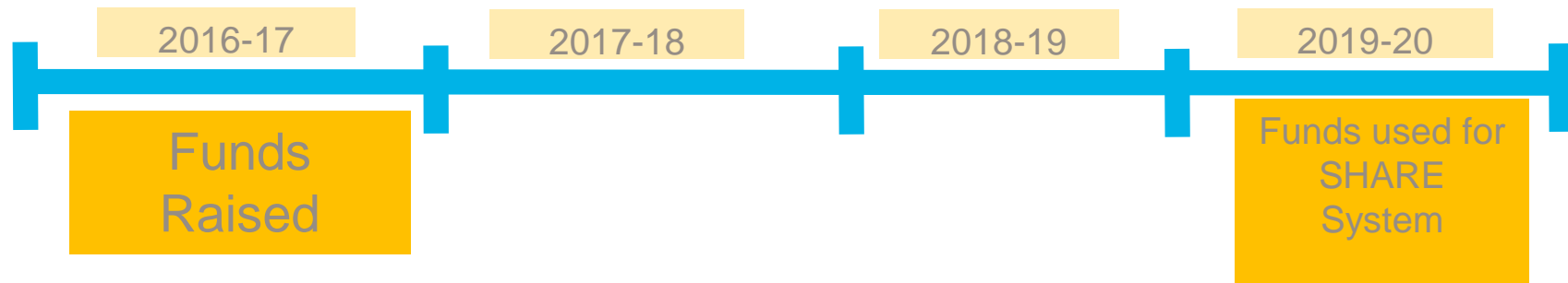
To End Polio



# SHARE SYSTEM – FUNDS DISTRIBUTION



# SHARE SYSTEM – FUNDS DISTRIBUTION AND TIMELINE





## Part 5: Giving Options and Recognitions

# TYPES OF GIFTS AND RECOGNITIONS



## Individual Gifts & Recognition

Sustaining  
Member  
\$100/yr

Paul Harris Society  
\$1,000/yr to Restricted  
Fund

Multiple Paul  
Harris Fellow  
\$1,000/yr

Sustaining Paul  
Harris  
\$100/yr

Benefactor  
\$10,000 Pledge to  
World Fund

Bequest Society  
\$10,000 Pledge

Paul Harris Fellow  
\$1,000

Major Donor  
\$10,000

Arch Klump Society  
\$250,000

## Club Recognition

100% Foundation Giving

100% Paul Harris Club

100% EREY Sustaining Club

## Foundation Recognition

Transfer of Paul Harris Points





## EXAMPLES OF **INDIVIDUAL** GIFTS & RECOGNITION

### **Paul Harris Fellow \$1,000**



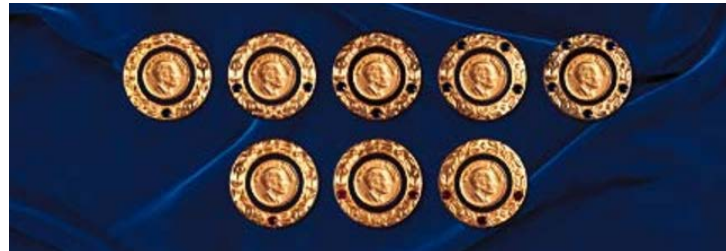
Recognition consists of a certificate and pin

### **Bequest Society \$10,000 Pledge**



Recognition consists of an engraved crystal recognition piece and a pin

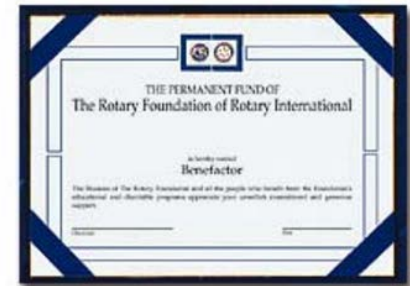
### **Multiple Paul Harris Fellow Subsequent \$1,000 levels**



Recognition consists of a pin set with additional stones (sapphires & ruby) corresponding to the recipient's recognition amount

### **Benefactor**

### **\$1,000 to Endowment Fund**



Recognition consists of a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin

## CLUB RECOGNITION – IN HONOR OF THE CENTENNIAL YEAR (BEGAN 1917)



### CENTENNIAL FOUNDATION GIVING

In celebration of our Foundation's centennial, several of these goals refer to the original donation of \$26.50 that started The Rotary Foundation in 1917. Additionally, \$536 is the approximate equivalent of \$26.50 today.

#### **Clubs must achieve 3 of the following goals:**

- Support with a contribution of at least \$536.
- Support with a contribution of at least \$26.50 from each member.
- Attain at least \$2,650 in total giving to PolioPlus in honor of TRF centennial.
- Attain a minimum Annual Fund contribution of \$100 per capita.
- Attain a five-year high in total club giving to the Foundation (combined giving by all members under any designation, with a minimum contribution of \$26.50 per member) in honor of the Foundation's centennial.
- Increase the total number of Benefactors and Bequest Society members in the club by at least one.

## CLUB RECOGNITION – IN HONOR OF THE CENTENNIAL YEAR (BEGAN 1917)



### CENTENNIAL FOUNDATION GIVING

In celebration of our Foundation's centennial, several of these goals refer to the original donation of \$26.50 that started The Rotary Foundation in 1917. Additionally, \$536 is the approximate equivalent of \$26.50 today.

### **Elk Grove Rotary aims to meet District 5180 Goals:**

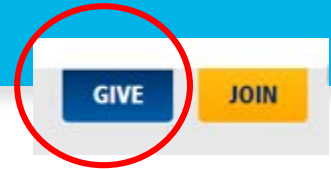
- 110% of club's best giving in last 5 years--for us that means \$28,267
- 110% of best year or \$2,650 for polio plus
- 75% of our club to benefactors; 10% bequest
- Apply for a district and/or global grant



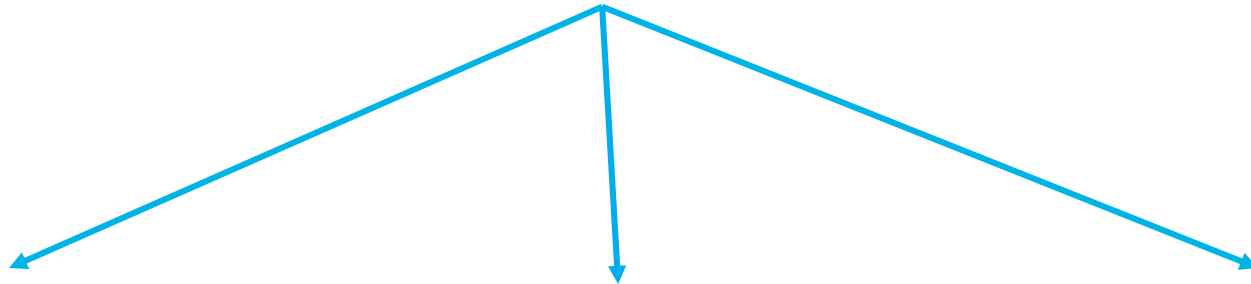
## Transfer Recognition Points

1. Foundation recognition points belong to the original donor until the donor uses the points or transfer points or until death
2. Original donor can help a fellow Rotarian by transferring their points towards a Paul Harris Fellow
3. Minimum 100 Foundation recognition points must be transferred at a time
4. Complete Transfer form with authorization

**HOW DO I GIVE?** Go to <https://www.myrotary.org> and click on "Give"



## Select one of these choices



### Annual Fund

For Support Today



### Foundation World Fund

To Secure Tomorrow



### Restricted Fund

To End Polio, Specific Causes or Projects





# THERE ARE MANY **OTHER WAYS** TO GIVE



## Cash/ Checks

Immediate tax benefits to donor



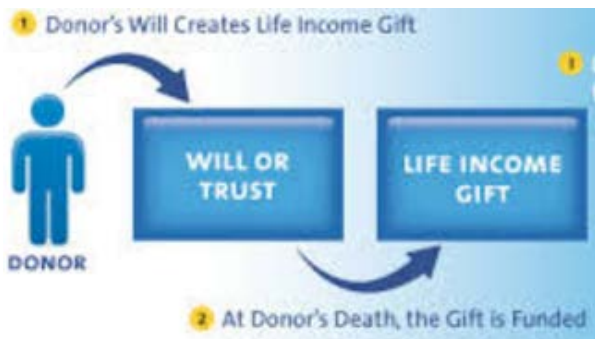
## Stocks & Securities

Appreciated securities have double tax advantage – 1) charitable tax deduction and 2) avoid capital gains



## Real Estate

Real estate and other property with special tax benefits



## Life Income Gifts

Charitable Gift Annuity or Charitable Remainder Trust



## Life Insurance

TRF as beneficiary; possible tax benefits



## Bequest or Estate Gift

Name TRF as beneficiary in will or estate plan



# WHILE YOU'RE HERE....**HELPFUL TIPS** YOU SHOULD KNOW ABOUT

## Use the pre-populated Contribution form to save time

**1** Individual Contribution Form

Rotary Workgroups

Recommendations

My Invitations

Credit card opt-out (U.S. & Canada)

Donor History Report

**2** **Generate Pre-Populated Form**

GLOBAL CONTRIBUTION FORM (123-EN)

Generate Blank form

MULTIPLE DONOR FORM (094-EN)

Generate Pre-Populated Form

Generate Blank form

## Request Direct Deposit

Home | Take Action | Give

### GIVE

#### OTHER WAYS TO GIVE

##### RECURRING GIVING (ROTARY DIRECT)

Make your giving to the Foundation easy by enrolling in Rotary Direct, Rotary's recurring giving program. You select an amount and frequency that's convenient for you. [Get started.](#)

##### PAUL HARRIS SOCIETY

[Find out](#) why you should join the Paul Harris Society.

##### CHECK, DRAFT, OR WIRE PAYMENTS

[Learn how](#) to donate with different payment methods.

##### SECURITIES

[Learn how](#) you can donate stocks, mutual funds, or other securities.

##### PLANNED GIVING

## Transfer Recognition Points

**Rotary** **PAUL HARRIS FELLOW**  
**RECOGNITION TRANSFER REQUEST FORM**

Please send your completed form only once. If you have questions regarding recognition or contributions to The Rotary Foundation, please contact the Rotary Foundation Center at 1-866-6ROTARY (1-866-976-8279), or email: [rotary@rotary.org](mailto:rotary@rotary.org), or contact the Rotary Foundation Center at 1-866-6ROTARY (1-866-976-8279), or email: [rotary@rotary.org](mailto:rotary@rotary.org), or contact the Rotary Foundation Center at 1-866-6ROTARY (1-866-976-8279), or email: [rotary@rotary.org](mailto:rotary@rotary.org).

Contributions can be made at: [www.rotary.org/give](http://www.rotary.org/give).

1. RECIPIENT OF RECOGNITION

Transfer Recognition Points to:

Name: \_\_\_\_\_ Recipient ID Number: \_\_\_\_\_

Club Name: \_\_\_\_\_ Club No: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Country: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

2. TRANSFER RECOGNITION POINTS

Foundation Recognition Points Amount: \_\_\_\_\_ (Minimum of 100 points)

Transferring Recognition Points from: ☐ Individual ID Number: \_\_\_\_\_ ☐ Club Number: \_\_\_\_\_

AUTHORIZED SIGNATURE (required): \_\_\_\_\_ Print Name: \_\_\_\_\_

**3** A customized report will generate for you. Message will say: Your report has been generated. Click here to review report.

**NOTE:** google "recognition transfer rotary" or click on URL above. Impossible to find on MyRotary website