

ARIZONA ROTARY LEADERSHIP ACADEMY
Class of 2021-22

**“UNDERSTANDING & UTILIZING THE
ROTARY FOUNDATION”**



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Dear Leadership Academy Class Member:

Congratulations on being accepted into the 2021-22 Rotary Leadership Academy class. I commend you for your dedication to and interest in Rotary.

Welcome to our session on The Rotary Foundation – **OUR** Foundation.

Our **learning objectives** are to understand:

- Giving to the Rotary Foundation
- Spending Rotary Foundation funds in our club and district (Rotary grants)
- District Designated Funds (DDF) and how to use them effectively in your district
- The District Rotary Foundation Committee in your district
- Where to go for help

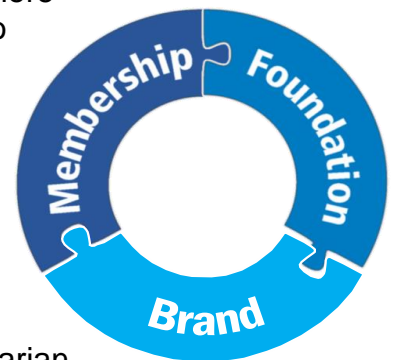
I want each of us to be familiar with the **mission of the Rotary Foundation**.

“The mission of the Rotary Foundation is to enable Rotary members to

- advance world understanding, goodwill, and peace through the
 - improvement of health
 - support of education
 - and the alleviation of poverty.”

To me, this means that our Foundation helps (enables) each of us to make the world a better place, to improve the lives of the less fortunate, to make a difference. Because of the Foundation, we can leverage resources to accomplish so much more than we could alone. Whatever is our passion, we can find a niche to do good in the world (in our own communities or on the world stage) using Foundation resources. I believe this session will help you do just that.

It is important to realize that Foundation is one of the so-called three essential elements, Foundation, Membership, and Brand (Public Image). As illustrated in the graphic, these elements are interconnected. Branding helps build membership, increased membership leads to increased Foundation giving and more humanitarian



projects. These projects help to build the Rotary brand, thus continuing the cycle. RLA will introduce you each of these elements, among other important topics.

This session is primarily self-guided at your own pace. However, feel free to contact me anytime if you have questions or otherwise need help.

In this session, we will draw on many resources.

Among the most important resource is **The Rotary Foundation Reference Guide**. You can access it online with a search for Rotary Foundation Guide. Or you can use this URL:

<https://search.yahoo.com/search?fr=mcafee&type=E211US105G0&p=rotary+foundation+reference+guide>

If you have an old copy, please obtain the latest version. Look at the bottom of the back cover. It should say 219-EN – (621). This means Document Number 219, English version, dated June 2021. If yours does not say 621, you will need a new one because much is changing.

Another **important resource** available to you is ***The Rotary Foundation Resource Guide for Zones 26/27***. This online document is updated frequently, so it is important that you download the most recent version directly from the Zone 26/27 website. This is not an official Rotary publication, but a regional resource compiled by your Annual Giving Officer (an RI staff member) to assist you with accessing Rotary tools.

It includes valuable details about fundraising, recognition for clubs and individuals, reports available to assist your club, hyperlinks to many useful documents, videos and other resources your club can use, and contact information for your Zone 26 Rotary Foundation team.

Here are the steps to access the most recent version of the Resource Guide.

Finding the most recent version of this Resource Guide online:

1. Visit www.zone2627.org
2. Scroll to the bottom left-hand side.
3. Under Resource Guide, click on “TRF”
4. Click on the “Download” button on the top right corner
5. Save the file to your computer

If you feel this is too much information for yourself personally, I encourage you to inform your Club Rotary Foundation Committee Chair about the availability of this guide. It will be extremely valuable to the club.

Rotary offers valuable online resources available on www.rotary.org. To access these resources:

- 1) Log into My Rotary (using your user name and password)
- 2) Hover over “Learning & Reference”
- 3) Click on Learning Center
- 4) Click on Rotary Foundation. You will find short courses on the following topics.
 - Intro to TRF
 - Rotary Peace Fellowships
 - Club Rotary Foundation Committee Basics
 - District International Service Committee
 - District Rotary Foundation Committee
 - Grant Management Seminar
 - And much more

I encourage you to peruse these online courses at your leisure. They are NOT required for this session of RLA.

Additional resources:

You may also want to obtain a copy of the recently published history of the Foundation’s first 100 years, *Doing Good in the World – The Inspiring Story of the Rotary Foundation’s First 100 Years*, by David C. Forward. David has done a masterful job of providing an in-depth look at how the Foundation came into being and how it accomplishes the mission stated above. You can purchase it online. A web search for the title will lead you to Amazon. This exciting volume commemorates the Foundation Centennial (celebrated in 2017).

In your district: Your District Rotary Foundation Committee Chair is a valuable resource. You will be required to contact him or her several times during this course. I encourage you to get to know the Chair of your District Rotary Foundation Committee.

- D5500: PDG Teree Bergman, luvgoldens@me.com, 520-395-6804
- D5495: PDG Charlie Tegarden, ctegarden@outlook.com, 928-715-1001

Your assignment, which is due not later than Nov 30, 2021:

Part 1. Getting up to speed.

1. Download Chapters 1 through 4 from the RLA coursework website (<http://arizonarla.org/coursework/>).

2. Scan Chapter 1, History and Organization of The Rotary Foundation, and Chapter 2, Organization of the District Rotary Foundation Committee.
3. Read Chapter 3, Giving to The Rotary Foundation, and Chapter 4, Spending Rotary Foundation Funds.
4. Review *The Rotary Foundation Reference Guide* previously downloaded.

Part 2. Rotary grants. Download the following documents from the RLA website (be sure to access the documents that apply to your district):

- A copy of an ongoing or recently completed Global Grant for which a club in your district (or your district) served as either the Primary International Partner or Primary Host Partner.
- Procedures in your district for District Grants
- Procedures in your district for Club Qualification

Write a report (two pages maximum) to answer the questions outlined below.

1. **Global Grants.** Review the application and **discuss it with a knowledgeable Rotarian in the partner club.** At a minimum, please answer the following questions:
 - a. Which club/district served as Primary Host Partner? Primary International Partner?
 - b. At what location was the project performed?
 - c. What community need does this project remedy? How does the project satisfy that need? Was a Community Needs Assessment performed? By whom?
 - d. What are the sustainability aspects of the project?
 - e. What metrics are used to measure the successful outcomes of the project?
 - f. What do you see as the greatest challenge to success for this project?
 - g. Within which Area of Focus does the project fall?
 - h. How did Rotarians participate in the project?
 - i. What is the budget for the project? What is the source of funds? How much from clubs, The Rotary Foundation, other sources (please specify)?
 - j. Please identify the Rotarian in the partner club with whom you spoke.
2. **District Grants.** Review the procedures for District Grants in your district. Discuss these procedures with the chair of your District Grant Subcommittee in your district. What are the general provisions of this program in your district and how does it benefit clubs? Who can apply? What is the deadline? What matching funds are available? Is there a limit on funds available to a club? If so, what is the limit? If you were in a position of district leadership, what changes

might you recommend to the District Grant process in your district? Please explain your answer.

3. **Club Qualification.** Rotary requires that clubs meet certain requirements to be qualified to receive Global Grant funds. Some districts may also establish similar requirements for receiving District Grant funds. Find out what these requirements are in your district (for both Global Grants and District Grants). What are these requirements? Is your club qualified? What do you see as the advantages and disadvantages of the club qualification process? (These might be advantages to RI or to your district, or to your club – please consider all aspects). If you were in a position of district leadership, what changes might you recommend to the process for club qualification in your district? Please explain your answer.

Note. You can learn more about District Grants, Global Grants, and Club Qualification at the Rotary Learning Center mentioned above.

Part 3. District Designated Funds (DDF) and how to use them effectively in your district.

1. Download from the RLA website a copy of your district Available DDF Report for the prior Rotary year. A copy from 2018-19 can be found attached to this letter.
2. Check out the online course on District Rotary Foundation Committee to determine the allowable uses for DDF.
3. **Write a report** (maximum one page) to answer the following questions (you may have to ask the District Rotary Foundation Committee Chair for some of this information):
 - a. At the start of the prior Rotary year, how much DDF did your district have available. How much was new DDF and how much was carry over from the previous year?
 - b. How does your district earn DDF? What can your district do to increase the amount of new DDF in future years?
 - c. What are the priorities established by your district for using DDF? Does your district have a history of donating DDF to polio? To the Rotary Peace Centers?
 - d. How are DDF allocation decisions made in your district? In other words, who makes the decision?
 - e. Is there a process for clubs to apply for DDF in support of Global Grants? Is this process generally known to clubs in your district? If not, how could clubs be made aware of this process?

- f. If you were able to influence the decision process for allocation of DDF, what changes (if any) would you suggest? Consider all possible uses of DDF (district grant, global grants, donation to polio, donation to Peace Centers, other). Please explain your answer.
- g. How can your district allocate DDF to maximize the World Fund match?

Part 4. Analysis of giving to The Rotary Foundation by clubs in YOUR district.

1. Rotary provides a number of reports to help district leaders analyze giving by clubs in the district. Two such reports are the Monthly Contribution Report and the Foundation Banner Recognition Status Report. Download these reports from the RLA website (be sure to access the reports applicable to your district. Please note: These reports are sensitive. Please do not share with others.
2. Review these reports. **Write a report** (maximum one page) to answer these questions:
 - a. If you were in a position of leadership in your district, how might you use the information in these reports? What do you see as the value of these reports to Rotary leaders in your district?
 - b. Goal setting. What percentage of clubs in your district set a goal for giving to the Annual Fund? What percentage actually gave? What do you believe is the value of goal setting by clubs?
 - c. Consider the clubs that did not give. What do you believe is the impediment to giving in these clubs? If you were in a position of leadership in your district, what actions might you take to help these clubs understand the value of contributions to the Annual Fund? To PolioPlus? To the Endowment Fund?
 - d. Consider the Annual Fund top-three giving clubs. What do you believe motivates Rotarians in these clubs to give? If you were in a position of leadership in your district, what actions might you take to recognize these clubs?
 - e. Consider the clubs that earned a 100% Foundation Giving Club Banner or a 100% EREY Banner. If you were in a position of leadership in your district, what actions might you take to recognize these clubs?
 - f. Rotary sets a goal of \$100 per capita per year for giving to the Annual Fund. Why do you believe this goal is important? If you were in a position of leadership in your district, what actions might you take to encourage Rotarians in your district to achieve this goal?
 - g. Rotary sets a goal of \$1500 per club per year for giving to PolioPlus. Why do you believe this goal is important? If you were in a position of leadership

in your district, what actions might you take to encourage clubs in your district to meet this goal?

- h. Paul Harris Society (PHS) (see Chapter 3 if you are not familiar with Paul Harris Society). What is PHS? What recognition is provided? Why do you believe Rotary established PHS?

Part 5. Using The Rotary Foundation Resource Guide for Zones 26/27.

1. Download the resource guide from the Zones 26/27 website (see instructions on page 2 of this letter).
2. Scan the table of contents to find at least two topics about which you want to learn more. For example: under Fundraising, you might choose Rotary Direct, or under Recognition, you might choose Paul Harris Society or Club Banners, etc.
3. Go to the topics you selected and download at least one document under each topic.
4. **Provide written answers** to the following questions:
 - a. What topics did you choose and why.
 - b. What documents did you download and why.
 - c. Identify at least one useful thing you learned (or had reinforced) by each document.
 - d. How might the resource guide be useful to your club? To leaders in your district?

Part 6. Interview your District Rotary Foundation Committee Chair.

Contact the chair of your District Rotary Foundation Committee. Arrange a mutually convenient time to interview him or her (by phone, zoom, in person, or other mutually convenient mode). At the agreed upon time, conduct the interview. The objective is for you to become familiar with the committee structure, goals, challenges, plans, and members. Please write a report summarizing the results of your interview. You can ask any questions you like, but I specifically ask you to find answers to these questions:

- Does the committee have an organization chart? If so, please provide a copy. Who are the major players in the committee? In other words, which Rotarians in your district serve on the committee? Do the subcommittees have more than one member?
- What goals did the committee establish for Rotary Year 2021-2022? What process was used to establish these goals? Who participated in the goal-setting process? How are these goals communicated to the committee? To the District leadership? To the district as a whole? How closely do these goals align with goals from previous years? If you were serving on the committee, what changes might you suggest? (New goals? Deleted goals? Process changes?)

- What are the major challenges facing the committee this year? What steps are being taken to mitigate or face these challenges? If you were serving on the committee, what steps might you suggest?
- What actions does your district take to recognize donors to the Rotary Foundation? If you were in a position of leadership in your district, what actions might you take?
- Does your district plan any Foundation-related events in the current Rotary year? What events are planned? Foundation seminar? Foundation gala? Recognition events? Fundraisers? Polio events? If you were in a position of leadership in your district, what events would you like to see in your district?
- Do you have any interest in serving on this committee? If so, what specific role would you prefer?
- What do you believe is the role of this committee in your district?

Part 7. Attend at least one meeting of the District Rotary Foundation Committee in your district. Contact the DRFC Chair to determine the schedule of meetings and the best way for you to attend (in person, zoom, or phone). It may not be possible for you to attend before this course is due to be completed. Therefore, attendance is not required for graduation. **Attendance is optional but highly recommended.** If and when you do attend, please let me know and try to identify one thing you learned or had reinforced.

Please do not hesitate to contact me with questions and/or comments. My contact info appears above.

I wish you the greatest success with this session and with your entire Academy course work.

Ernie Montagne
 PDG District 5500 2010-11
 Chair D5500 Future Vision Transition Committee 2011-12
 Chair District Rotary Foundation Committee 2013-16
 Zone 26 End Polio Now Coordinator 2017-20
ernie.montagne@hotmail.com 520-250-4067

PS. I ALWAYS acknowledge emails in a day or two. If you contact me at the above email, and I do not respond within two-three days, please call me. Sometimes emails go away. I will provide an alternative email address.



AVAILABLE DDF BY DISTRICT

For District 5495 In Program Year 2018 - 2019

Transaction	Description	Amount	Balance
50% of Annual Fund Share contributions from 2015 - 2016		\$0.00	\$0.00
50% of Available Endowment Fund Share Earnings		\$0.00	\$0.00
Carry Forward from 2017 - 2018		\$106,454.56	\$106,454.56
District Transfer	From District 5490	\$99,489.30	
District Transfer	From District 5510	\$73,300.40	
Total DDF Transferred		\$172,769.70	\$279,224.26
Project Funding	DG1977387	(\$91,030.00)	
Project Funding	GG1752923	(\$4,000.00)	
Project Funding	GG1868120	(\$1,930.00)	
Project Funding	GG1873991	(\$1,000.00)	
Total DDF Funding		(\$97,960.00)	\$181,264.26
Returned Funds	DG1861732	\$4,025.00	
Total DDF Returned Funds		\$4,025.00	\$185,289.26
Actual DDF Balance			\$185,289.26
Tagged	GG1754813 Submitted	(\$6,720.00)	
Tagged	GG1756350 Submitted	(\$3,448.00)	
Tagged	GG1865174 Submitted	(\$10,000.00)	
Tagged	GG1865425 Submitted	(\$3,586.00)	
Tagged	GG1868701 Submitted	(\$8,750.00)	
Total DDF Tagged		(\$32,502.00)	\$152,787.26
Uncommitted DDF Balance (Estimated)			\$152,787.26
Pending Allocations	GG1641886 Draft	(\$8,500.00)	



AVAILABLE DDF BY DISTRICT

For District 5500 In Program Year 2018 - 2019

Transaction	Description	Amount	Balance
50% of Annual Fund Share contributions from 2015 - 2016		\$147,567.03	\$147,567.03
50% of Available Endowment Fund Share Earnings		\$0.00	\$147,567.03
Carry Forward from 2017 - 2018		\$121,640.81	\$269,207.84
Project Funding	DG1977966	(\$74,405.00)	
Project Funding	GG1888120	(\$1,000.00)	
Total DDF Funding		(\$75,405.00)	\$193,802.84
Actual DDF Balance			\$193,802.84
Tagged	GG1635675	Submitted (\$27,000.00)	
Tagged	GG1750511	Submitted (\$7,500.00)	
Tagged	GG1754813	Submitted (\$1,000.00)	
Tagged	GG1885425	Submitted (\$33,500.00)	
Tagged	GG1866780	Submitted (\$1,000.00)	
Tagged	GG1868701	Submitted (\$3,250.00)	
Total DDF Tagged		(\$73,250.00)	\$120,552.84
Uncommitted DDF Balance (Estimated)			\$120,552.84
Pending Allocations	GG1862388	Draft (\$20,805.00)	
Pending Allocations	GG1864823	Draft (\$5,000.00)	
Pending Allocations	GG1866417	Draft (\$2,000.00)	
Pending Allocations	GG1877229	Authorizations Required (\$1,000.00)	
Pending Allocations	GG1977332	Draft (\$5,000.00)	
Total DDF Pending		(\$33,805.00)	\$86,747.84
Unallocated DDF Balance (Estimated)			\$86,747.84