

DISTRICT 5170

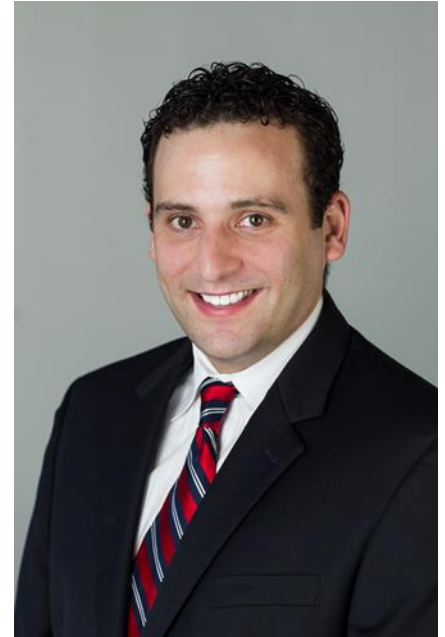
# TRF NEWS TODAY

AUGUST, 2014

CURRENT NEWS OF DISTRICT 5170 AND THE ROTARY FOUNDATION

## Welcome to Steve Solomon, Rotary Foundation Guru!

There are few people in the Rotary world who know more about The Rotary Foundation than Steve Solomon, who will be the featured speaker at the **September District Cabinet Meeting, September 3<sup>rd</sup> at 6:30 p.m. at the Doubletree Hotel.** Steve is the Annual Giving Officer for Zones 25/26 (Western North America), and this is the time of year when he thrives: getting out the message of the great humanitarian works of the Rotary Foundation as we lead up to Rotary Foundation Month in November. Steve started with Rotary on the “ground floor”, beginning as an Interact Club member and an Ambassadorial Scholar in South Africa. He is currently an honorary Rotarian with two Rotary clubs in Illinois. Besides his impressive hands-on experience, he has also learned the academics of foundation work, earning a Master of Science in Nonprofit Management with a concentration in Fundraising Management.



During his many Rotary travels, Steve assists with training seminars, district conferences, club presentations and other special events to promote The Rotary Foundation. He was responsible for orchestrating Dr. Jane Goodall’s participation at Rotary’s 100th International Convention and serving as the primary contact for Archbishop Desmond Tutu at the Rotary World Peace Symposium in England. Steve passionately believes in the power of Rotarians to use their skills to responsibly better communities at a grass roots

level and is honored to make a living doing something he believes in- supporting The Rotary Foundation. All District Rotarians and their guests are invited to join District Governor Ed Jellen and special guest Steve Solomon at the Cabinet Meeting on Wednesday, September 3<sup>rd</sup>. Contact Brittany for further details at [brittany.5170@gmail.com](mailto:brittany.5170@gmail.com).

# The District Foundation Chair's Corner

Dear Rotarian Friends,

The summer is about over and kids are back to school already, in most areas! The District Rotary Foundation Committee has been hard at work, organizing and conducting training seminars, securing and preparing for Steven Solomon's visit to our Cabinet Meeting on September 3<sup>rd</sup>, kicking off the Annual Giving campaign and improving the technology behind our District Grants.



Steven Solomon is The Rotary Foundation's Annual Giving Officer for Zones 25 and 26. He is an energetic and committed representative of TRF with a long connection to Rotary. He's got a great story and we hope you will all attend the September 3<sup>rd</sup> Cabinet Meeting at the Doubletree Hotel.

Be sure and catch the article which follows by Greg Stowers, the Annual Giving Chair for District 5170. Greg is working hard to bring new energy and ideas to our campaign and I recommend you catch his ideas (coming up) about increasing our district's Annual Giving by attracting "Other Peoples' Money" (OPM).

Georgie Hildebrand and her grants team are doing a bang-up job and they are ready to receive your District Grant applications. The money is in the bank, so bring those applications on! You will see an article from her here, showing you how to navigate the District Grants system.

All 47 of us on the District Rotary Foundation Committee (It Takes A Village) are available to answer questions and to assist you to make this the best Rotary Foundation year ever for your club and our district!

*Cecelia Babkirk*

Chair, District Rotary Foundation Committee  
[rotariancecelia@gmail.com](mailto:rotariancecelia@gmail.com)

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*Did you know...*

**...that the Rotary Foundation of Rotary International is one of the highest-rated charitable organizations in the world, earning a "4-Star" rating from The Charity Navigator, including a 100% rating for Accountability & Transparency?**

# Georgie's Grants Corner

By Georganna Hildebrand, Grants Chair

Now it is easier than ever to find the information and forms you need to use your DDF in either a District or Global Grant. Simply go to the District website [rotarydistrict5170.org](http://rotarydistrict5170.org) and click on "The Rotary Foundation" at the tab across the top. Click on "Grants" and you will see a welcome page that explains what you will find in the other tabs. You can also click on the name of your Grant Resource Leader with questions.

The second tab "Grants Info" give you information you will need to do either a

## GRANTS INFORMATION

Select a Topic:

- » Welcome
- » GRANTS INFO
- » DISTRICT GRANTS
- » GLOBAL GRANTS
- » SCHOLAR GRANTS

Shortcut Links:

- » District Grants Tracking Report
- » Applying for a Global Grant at Rotary.org

### Resources for District and Global Grants

This page has links to Manuals and other general information about District and Global Grants including the spreadsheet that tells you how your Club allocated it's DDF to District and Global Grants.

- [2014-2015 DDF Allocations](#) - Club's allocation of DDF
- [District 5170 Grants Manual](#) (revised 2014)
- [RI Grants Management Manual](#)
- [Rotary Grants Terms and Conditions](#)
- [Summer 2014 Grants Management Training Slides: Rotary Foundation Giving](#) (Cecelia Babkirk)  
[District & Global Grants](#) (Georgie Hildebrand)

District or Global Grant including the Power Point presentation from our training meetings.

The third tab, "District Grants" gives you all of the forms to write an Application for a District Grant.

The fourth tab, "Global Grants" includes documentation on how to gather information to write a Global Grant Application, a link to the Application, and the District forms you may need.

## DISTRICT GRANTS

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### District Grants

This page has all the forms you need to draft a District Grant. It also includes a couple examples of District Grants from last year to help you fill out the Application.

- [2013-14 Final Report Form](#)
- [2014-15 Applications](#)  
[District Grant Application for Local Project](#)  
[District Grant Application for International Projects](#)
- [2014-15 Supporting Documents](#)  
[DDF Transfer Form for District Grants](#)  
[MOU for Cooperating Organization on Local Projects](#)  
[MOU for Cooperating Organizations on International Projects](#)
- [Sample District Grant Applications](#)  
[Example Local Project application \(no Cooperating Org\)](#)  
[Example International Project application \(no Cooperating Org\)](#)

The "Scholar Grants" tab lets you know when we are accepting applications for Scholar Grants. We tried to provide everything you need. Most important is the links to your Grant Resource Leaders on the Welcome page. They are there to help you.

**NOW GO OUT AND DO GOOD  
IN THE WORLD!**

## GLOBAL GRANTS

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- » GLOBAL GRANTS
- » SCHOLAR GRANTS

Shortcut Links:

- » District Grants Tracking Report
- » Applying for a Global Grant at Rotary.org

### Global Grants

Global Grant Applications are written, submitted and tracked on [Rotary.org](http://Rotary.org). This page includes planning resources and supplemental forms you may need to complete the Global Grant Application.

- [Planning Resources](#)  
[Global Grant Application Intro](#)  
[Global Grant Planning Questionnaire](#)  
[Global Grant Application in MS Word Format](#)
- [Supplemental Forms](#)  
[DDF Transfer Form for Global Grants](#)  
[District 5170 Carryover Agreement for Global Grants](#)  
[MOU for Cooperating Organizations for Global Grants](#)

Visit the [RI Grants](#) page to read more about Global Grants and to initiate a Global Grant Application.

# August Giving & Grants

News from the Rotary Foundation

## GIVING UPDATES

### ***A record-setting year***

Owing to the leadership and financial support of Rotarians around the world, 2013-14 was a record-setting year for our Annual Fund. Preliminary results suggest that more than \$250 million was contributed to help change lives locally and in communities around the world. Thank you!

### ***New year and new goals***

Has your club set Foundation giving goals for 2014-15? If not, there is still time to evaluate your club's fundraising efforts last year and submit goals for this year in Rotary Club Central. With your help, we can achieve our worldwide Annual Fund goal of \$123 million by 30 June.

### ***New Foundation funding model***

The Rotary Foundation Trustees have approved a new model for funding the Foundation's operating costs. Effective 1 July 2015, the Foundation will direct 5 percent of Annual Fund donations to administrative and fund development expenses and to build a strong operating reserve. The Foundation will also draw on other funding sources, including 5 percent of cash contributions for global grants. Most not-for-profit organizations allocate a percentage of their contributions to support future fundraising efforts. Looking ahead, the Foundation will continue its strong record of financial accountability and transparency. Read more about the new funding model.

## GRANTS UPDATES

### ***Packaged grants to be phased out***

Despite some successes with packaged grants, an evaluation revealed significant differences between the grants' goals and the actual experience of Rotarians. Therefore, the Trustees decided to allow options with the Foundation's strategic partners to expire at the end of their current terms. Packaged grants will end when all active grants are closed.

### ***Grant terms and conditions updated***

Grant terms and conditions are periodically updated for the sake of clarity and to incorporate policy changes. Most recently, the eligibility guidelines for district grants were expanded. District grants can now fund youth programs (including Youth Exchange, RYLA, Rotaract, and Interact), construction (including low-cost shelters), travel for staff of cooperating organizations, scholar orientation seminars, grant management seminars, and activities primarily implemented by an organization other than Rotary. See the current version of grant terms and conditions, which includes these changes.

### ***Return of funds***

If you need to return unused funds from your global or district grant, make sure to provide one check per project, and clearly indicate the project identification number on the check (or wire transfer). Also alert your district's regional grant officer. Note that funds returned to the Foundation without identification are recorded as a contribution to the Annual Fund. Email questions to [grant.payments@rotary.org](mailto:grant.payments@rotary.org).



***Coming in the September Issue of  
TRF NewsToday:  
SECRETS OF A SUCCESSFUL  
CROWDSOURCING CAMPAIGN***

## **Greg's Giving Corner** By Greg Stowers, Annual Giving Chair

It's hard to believe that the first two months of this Rotary year are nearly gone! The clubs now have their pledge cards and drawing tickets and District Governor Ed is rapidly making the rounds of all the clubs. We hope that you have all kicked off the Annual Giving campaign in your clubs and are bringing in those contributions!

In this Rotary year, we plan to bring some fresh new ideas about ways to raise money that doesn't involve nagging all your members. Think "**Other Peoples' Money**" (**OPM**) and **Crowdfunding**. Other clubs in our zone are using these and other techniques and have raised the bar in the Annual Giving world. As I mentioned in our Foundation Training, we live and do business in a part of the country which has the highest per capita income practically anywhere. While \$700,000 to \$750,000 is not shabby (many districts raise much less), we should strive to break the \$1 million threshold. I'm here to help you make that happen. Each month, we will give an example of clubs and Rotarians who are using innovative techniques to boost their Annual Giving. Let's not make this a chore. Let's make it a fun challenge!

In that spirit, I want to talk to you about **OPM** – specifically about raising funds for the Annual Giving Campaign from local companies and corporations. The following are some thoughts stimulate by an article that got me thinking about a good way to attract corporate funds. It fits with our mission to do good in the world:

- In keeping with the "teaching people to fish" concept, we strive, in Rotary projects, to achieve sustainable results. In the interest of fueling entrepreneurship in developing countries, arguably the best way to overcome grinding poverty, we provide micro loans to women, teach farmers updated farming techniques and organize them into enterprises to add value to their harvest, provide computer-aided-learning to young adults with a guarantee that the majority will be employed at the end of their schooling and other entrepreneurial activities.
- Could our local, regional and international companies donate funds, supplies and/or expertise that would help tiny factories and micro-enterprises such as these succeed in developing countries? Certainly they could. And it would make a great story in trade journals, magazines and newspapers. Publicity is a significant component in raising funds from companies large and small. Helping promote our mission can be a "no-brainer" for them, if you create publicity opportunities for businesses. In this scenario, publicity is a significant component in attracting corporate funds.
- Too often, we talk about the good things that the donor's money will do for those in need, but fail to appeal to the giver's self-interest. It's a maxim of direct marketing that you always sell benefits, benefits, benefits, because the reality is: Few people do anything out of pure altruism. Speaking of altruism, if a corporation contributes to the Annual Programs Fund, your club receives recognition credits AND it increases your DDF, so that you can do larger, more impactful programs, in line with your donor's mission. In a global grant, their contribution is leveraged by at least 50 cents for every dollar contributed. If that contribution is made through the Annual Giving campaign, the leverage is approximately 83 cents for every dollar contributed
- Reward the giver by creating a publicity opportunity - turn our Rotary story into a business story. Look for ways to donate what a company makes, and capitalize on every opportunity to tell that story far and wide. If a firm writes software, for example, its contribution to The Rotary Foundation can sponsor a scholarship for students majoring in Computer Science through a District or Global Grant. If a firm manufactures solar panels or water filtration systems, its contributions and expertise can create an economic opportunity, in which a start-up factory in Kenya, Honduras, or any other place in the world, can provide training and jobs to the local population. Almost any economic and community development effort (one of Rotary's Six Areas of Focus) will trigger related activities, improving the local economy beyond our initial efforts. Secure joint promotion from one of your trade journals and make sure everyone in your industry knows about these activities. This type of publicity is free and can have wide-ranging impact, in itself. Your club gets two publicity opportunities: One when the scholarship or contribution is announced, and another when it's awarded. The company may offer as little as \$1000, but the publicity will go much further than that amount spent in advertising!

**Be on the look-out for next month's issue of TRF News Today, where we'll have an article about Crowdfunding, by a Rotarian in our district who has been doing it!**

## Tool Time! By TRFNT Editor, Tim Lundell

Each month **TRF NewsToday** will provide Club Foundation Chairs with helpful hints and tools that are available to make the job easier. We hope you will find these items to be of benefit.

For Club Presidents and Foundation Chairs be sure to use the online tool on Member Access: **Rotary Club Central**. This program allows clubs to measure progress toward their goals, and see club achievements in three key areas: Membership, Service, and Foundation giving. Available since 2012, these tools change the way clubs interface with their District Governors by replacing paper forms traditionally used for setting annual goals. In addition to helping Club leaders, **Rotary Club Central** makes it easy for district leaders to review club activities throughout their district. It will also help gauge Rotary's worldwide impact. You must have a Member Access account and club authority to use this new program.

Another tool made available by The Rotary Foundation is the **"Doing Good in the World"** productions. These Telly Award-winning videos are available *for free* on YouTube at [https://www.youtube.com/playlist?list=PLGukUvNU\\_i3K58ZZBkQnl9T9aG4qHone1](https://www.youtube.com/playlist?list=PLGukUvNU_i3K58ZZBkQnl9T9aG4qHone1). Or order a copy at [shop.rotary.org](http://shop.rotary.org).

Also available is the **"Every Rotarian Every Year"** club Power Point presentation. This is a perfect club program presentation. And don't forget the "Every Rotarian Every Year" brochure and the "Rotary Direct" brochure. These and many other TRF aids are available at [shop.rotary.org](http://shop.rotary.org), and items shown with a "\$0.01" price are actually *free*!

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## *There are Many Ways to Give!*

### **Recurring Giving...**

The Annual Fund is the primary source of funding for all Foundation activities. Support our efforts year round by making a recurring gift. You choose how often and how much you want to give—it's a simple and secure way to make a big impact. A monthly, quarterly, or annual gift option is available for all online contributions. If you prefer, you may return the completed Rotary Direct enrollment form or enroll by phone at +1-866-976-8279. To update your existing recurring giving contributions, please email [rotarydirect@rotary.org](mailto:rotarydirect@rotary.org) or call +1-866-976-8279. For security reasons, changes to your credit card information should be made by phone.

### **Support a Specific Cause...**

You can direct your Annual Fund contributions to SHARE, the World Fund, or one of Rotary's areas of focus funds, and all contributions are spent wisely on quality Rotary projects. Annual Fund contributions that are directed to the Foundation's six areas of focus are credited toward a club's annual giving goal and per capital giving calculations. However, they are not included in a district's SHARE calculation and do not increase the amount of your District Designated Fund.