

Foundation


Art Deardorff – RI Foundation Chair

November 5, 1925



November is Rotary Foundation Month

- A time for Rotary Clubs around the world to celebrate the impact of the Rotary Foundation and renew their commitment to its work
- Activities focus on fundraising, raising awareness for projects, and recognizing how donations support initiatives in focus areas:
 - Promoting peace
 - Fighting disease
 - Providing clean water and sanitation
 - Saving mothers and children
 - Supporting basic education and literacy
 - Growing local economies
 - Protecting the environment



What is (or are) our
Foundation(s) ???

Drum roll

you probably all know this!



What is our
Foundation???

We are associated with two:

Lincoln Rotary Club Foundation (LRCF)

and

The Rotary Foundation (TRF)

Your giving can be directed to either

Rotary Club of Lincoln Foundation

Background

- ▶ **Foundation established July 2006**
- ▶ **Established to**
 - **Accept donations/income from fund raisers**
 - **Pay out for our charitable contributions**
 - **Administer donor–designated funds**
 - **Alan Bradford Scholarship Fund established**

By-Laws Summary

- ▶ **Foundation is a California Corporation**
- ▶ **Set up to meet 501(c)(3) of IRS regulations + Non-Profit Laws of California**
- ▶ **Minimum of 7 Trustees**
 - **At least 2 members to be from Rotary Club Lincoln**
 - **+ LRC President and President Elect (ex-officio)**
 - **Election of board members for 3-year term by Foundation members ~ June**

By-Laws Summary (cont)

- ▶ **Activities and affairs to be exercised by or under direction of Foundation Board of Trustees**
- ▶ **Board to meet 4-times yearly + special mtg's**
- ▶ **Officers: Pres., VP, Secretary, Treasurer elected by the board**
- ▶ **All RCL members are members of Foundation**

Operation of Foundation

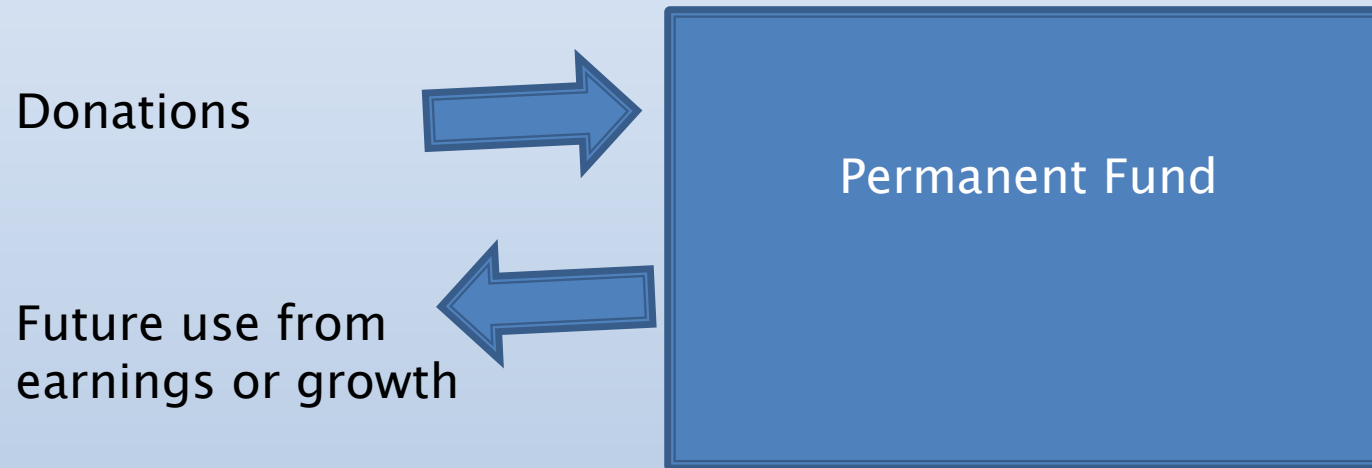
- ▶ Memorandum of Understanding (MOU) prepared in 2012 between Club and Foundation – updated March 2015
- ▶ In very simple terms, establishes how:
 - Club Board has exclusive responsibilities for fundraising and charitable contributions under the Foundation “umbrella”
 - Foundation Board has responsibility to oversee and manage Foundation funds
 - Foundation always has duty to assure that activities are conducted in accordance with non-profit law

Foundation Funds – Club

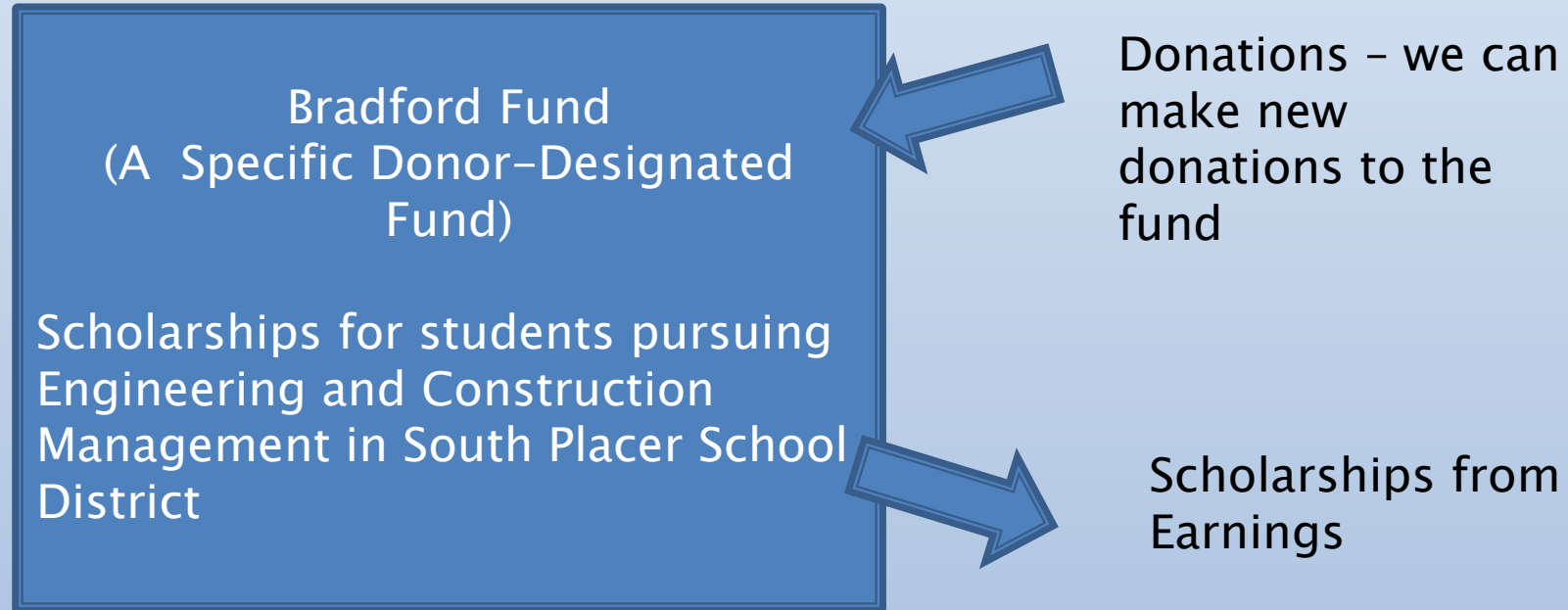


- Income and giving managed with consideration of Yearly Budget
- Donations may be directed to specific purposes (restricted) as accepted by Club Board of Directors

Foundation Funds – Permanent Fund – Nov 2014

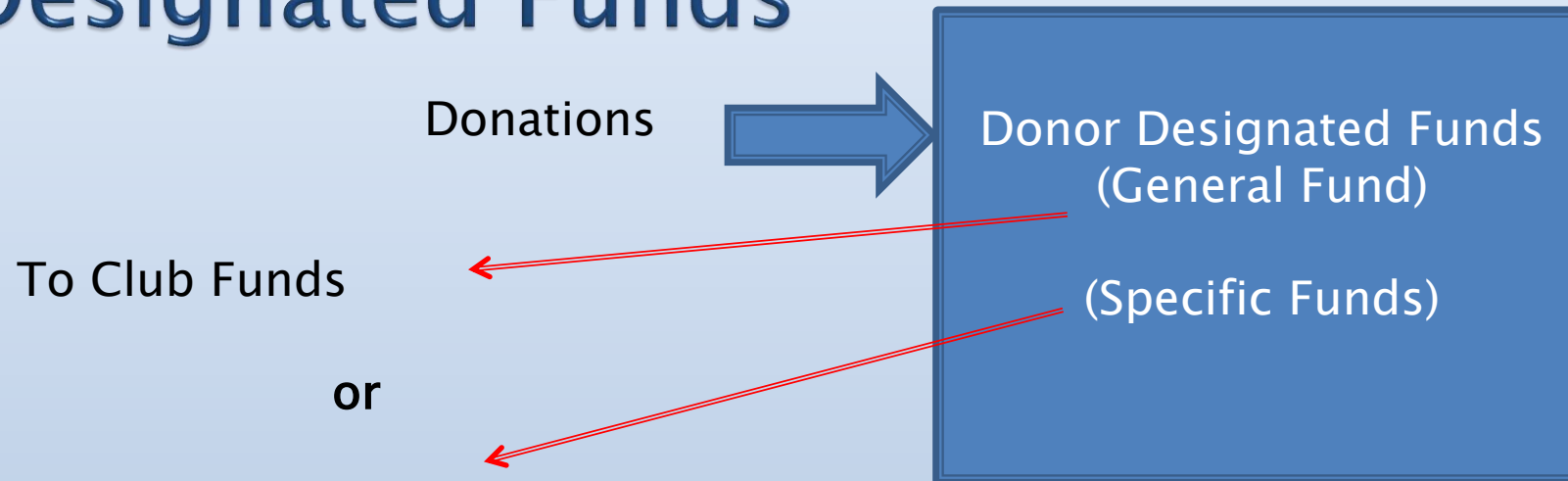


Foundation Funds – Bradford



* Established for deceased Rotarian
Craig Bradford

Foundation Specific Donor-Designated Funds



- To New Donor-Designated Charitable Project or Purpose or to a new Fund
- Bradford Fund is one example of this type of fund
- Others could be created if accepted by Club

What assets does Foundation have?

- ▶ Cash ~\$120,000
- ▶ Vanguard
 - Bradford Fund ~\$104,000
 - Permanent Fund ~\$27,000
 - LRC Properties Fund ~\$2,460,000
 - Temporary Funds ~\$3,000
- ▶ Total ~ \$4,000,000

(August 31, prior to transfer for B&G Club)

Special note for LRCF giving

- ▶ Donations can be directed to a specific fund or cause, as accepted by board.
- ▶ Donations of \$1,000 in year entitle donator to a **Bob Dart Award** pin (currently two have been given)

Club RI Foundation Committee

▶ **Committee Mission:**

- Promote giving to Rotary Foundation
- Recognize and reward our members for giving (e.g. Paul Harris awards)
- Educate our members about the foundation
- Recognize some community members with Paul Harris Awards (recommend to Club Board)

▶ **Members:**

- ▶ Art Deardorff (Foundation Chair), Richard Fowler, Frank Vranesic, Scott Cadwallader, Joann Hilton, Karen Johnson and Phil Koenig

Foundation Committee Activities

- ▶ Match TRF donations of at least \$100 up to \$200 with recognition points for each Rotary Year
 - Recognition points given for each member donation of \$'s
 - Paul Harris Awards given for each 1000 recognition points accumulated e.g. PH award given at 1000 points, PH+2 award given at 3000 points
- ▶ Polio Plus giving and Polio Plus Society (current 19 members)
PH Society is promise to give at least \$100 per year
- ▶ Encourage giving (e.g. Rotary Direct, Polio, Bequest, ...)

Individual Levels of Support and Recognition

- Paul Harris Fellow
- Paul Harris Society Member
- Major Donor
- Arch Klumph Society
- Foundation Benefactor
- Bequest Society



Current Status of Club

- ▶ Benefactor – 8
- ▶ Paul Harris Society – 3
- ▶ Major Donors – 4 (\$10,000 or more actual cash)
 - PH+8 – 9 (9,000 or more cash plus recognition points)
- ▶ Bequest Society – 12

- ▶ Rotary Direct – 7
- ▶ District Polio Plus Society – 19

Current Status of our Giving (July–Oct)

- ▶ Annual Share Fund – \$3,788
- ▶ Polio Plus – \$4,226
 - \$2,000 from club
 - Goal is \$4,000 **Congratulations**
- ▶ 5 members achieved \$200 or more giving
 - Will be awarded 200 matching recognition points

Club Levels of Support and Recognition

□ Every Rotarian Every Year Club:

- The club average giving is \$100 per person with each member giving a minimum of \$25 per year.

□ Sustaining Member:

- Every member gives at least **\$100 per year** to the Foundation and/or PolioPlus.

EVERY
ROTARIAN
EVERY
YEAR



The
Rotary
Foundation

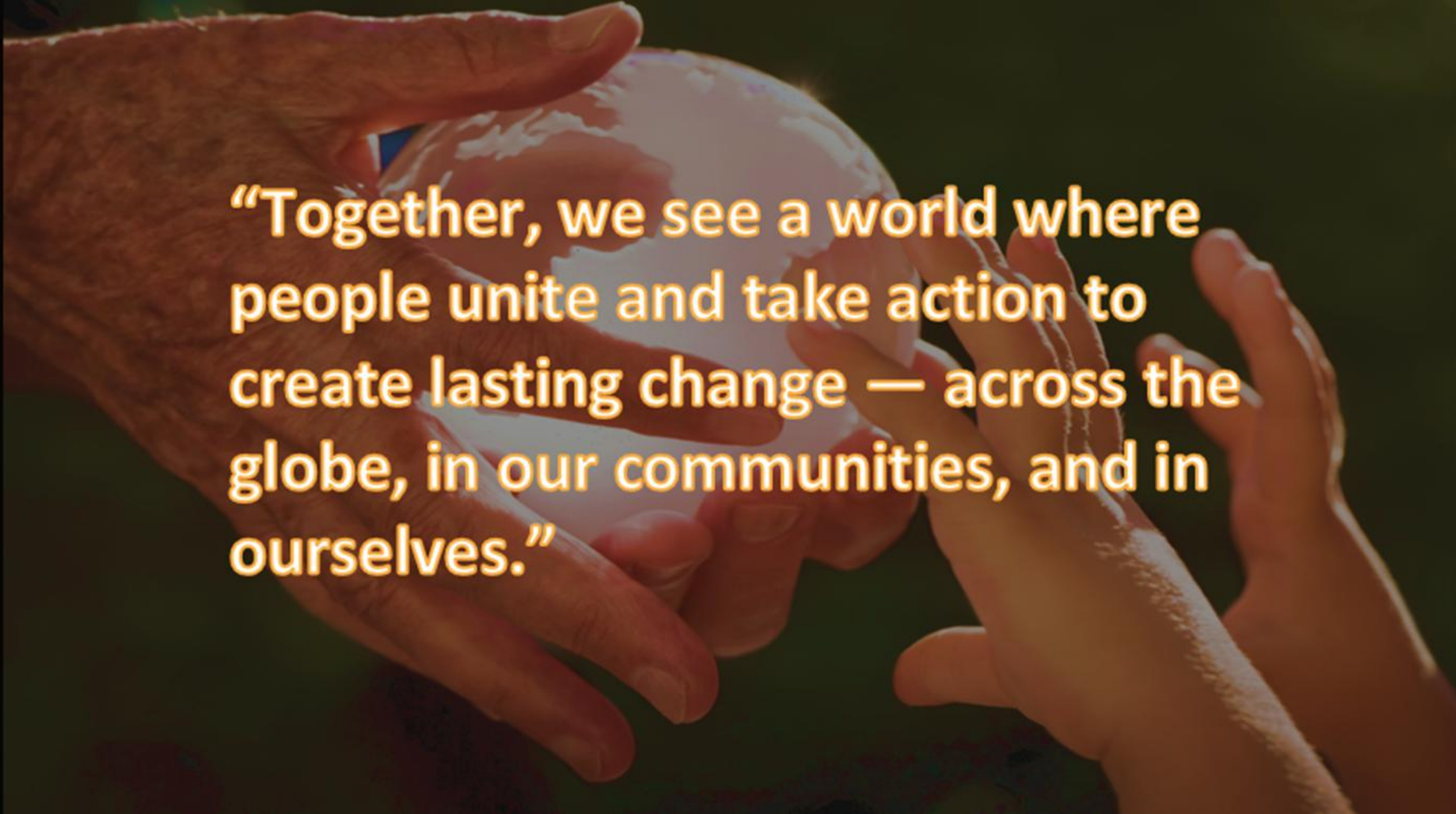


OUR ROTARY FOUNDATION – POWERED BY ROTARIANS!



Rotary's Vision Statement

“Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.”



HOW OUR ROTARY FOUNDATION WORKS

PolioPlus

Annual Fund

Endowment Fund

ROTARY'S #1 PROGRAM PRIORITY



PolioPlus



HOW OUR ROTARY FOUNDATION WORKS

PolioPlus

Annual Fund

Endowment Fund

Funds Spent on
Polio Only

Funds are
matched 2:1 by
Gates Foundation

HOW OUR ROTARY FOUNDATION WORKS

PolioPlus

Annual Fund

Endowment Fund

3 – Year SHARE
Gifts come in Y1, Y2
and Y3

Year 4:
Y1 Gifts Released to District
for Projects (50%)*

Interest Income helps
pay Operating costs

* 50% goes to World Fund
For global initiatives

ENCOURAGE EVERY ROTARIAN EVERY YEAR TO DONATE



Annual Fund

HOW OUR ROTARY FOUNDATION WORKS

PolioPlus

Annual Fund

Endowment Fund

About \$2 billion



ENDOWMENT NOW

A gift made during your lifetime that allows you to see your legacy in action

ENDOWMENT LATER

A documented promise of a gift that makes an impact in the future

RECOGNITION EXAMPLES

Immediate gifts

- Benefactor US\$ 1,000+
- Major Donor US\$ 10,000+
- Arch Klumph Society US\$250,000+

Future gifts

- Benefactor US\$ 1,000+
- Bequest Society US\$ 10,000+
- Legacy Society US\$1 million+

Wearable Recognition



**BENEFACTOR
RECOGNITION**

**AND BEQUEST
SOCIETY PINS**



Your Rotary Legacy

Doing Good in the World beyond your lifetime

We have made a commitment to Rotary Foundation Endowment.

appear on recognition materials and/or for future

vince, country, and postal code

Rotary club name

ile phone

on of the gift shall be:

and District Designated Fund)

- focus:
- at prevention/resolution
- n and treatment
- on
- health
- literacy
- unity development

ne number above to nces.

The bequest will be funded by (some gift options are not available in all regions):

- Will or living trust
- Retirement plan beneficiary designation
- Life insurance beneficiary designation
- Donor advised fund
- Charitable remainder trust
- Other (please describe) _____

The gift to The Rotary Foundation is expected to be:

US\$ _____
 (The dollar amount is used for recognition purposes; if no amount is selected we will default to Level One.)

Recognition options:

For those who commit \$10,000 or more, an engraved recognition crystal and one recognition pin per person will be automatically shipped to a home address.

My/our recognition preferences are noted below:

- I/we do not wish to receive an engraved crystal.
- I/we would like a pendant with the pin(s).
- Tell me more about special naming opportunities.
- Send all recognition materials to this address instead:


I/we have another request. (Please describe)

Signature _____ Date _____

Signature _____ Date _____

Please return this form and any supporting documents you wish to share that name Rotary as beneficiary. Contact information for your nearest Rotary office is featured on the back cover.





“Rotary’s tomorrow depends on what we do today.”

ARCH C. KLUMPH

District 5180

Various TRF Funded Grant Opportunities

VARIOUS TRF FUNDED GRANTS

- **District Grants**
- **Global Grants (\$30K+)**
- **Global Scholarships (\$30K+)**
- **Disaster Response Grants (25K+)**
- **Vocational Training Teams (\$30K+)**

- **Club Must Be 'Certified' by District**
- All required club members must have attended a District Grant Management Seminar for each Rotary Year for District Grants and have required club members take a pass the Grants training in Rotary's Learning Center for Global Grants.

Global Grants: What Are They?

Larger *'self-sustaining'* projects that truly make a difference and helps to create 'brand' awareness!

- Club contribution = \$15,000
 - 5% Club Cash *'set aside'* \$ 750
 - District matches 1/1 in DDF: \$15,000
 - TRF matches District 0.80/1 w/DDF: \$12,000
- TOTAL FUNDING= (PROJECT \$42,000) \$42,750**

District Grants: 1:1 Match of Club

Funded by TRF Share Funds

**Policies in Order to be Eligible to Receive ~\$5,000 in Grant Funds –
subject to change**

1. Specific Individual attend the grant certification seminar
2. Sign Rotary Foundation and District MOU
3. Current on District and RI Dues
4. Current on All Grant Reports
5. Current emphasis is for member-involved projects – but district will provide guidelines

Must apply for 2026-2027 Yr by about May 2026

Questions????