

District 9930 THE ROTARY FOUNDATION 'MINI MANUAL'



This information has been collated to assist you with The Rotary Foundation (TRF) matters as you prepare for and undertake your year as a District 9930 Rotary Club President for 2019-20.

1. KEY DATES

| 2018-19 – AS PRESIDENT ELECT: | |
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| <p>PETS 1 November 2018</p> | <p>Following PETS 1 you should start thinking about:</p> <ul style="list-style-type: none"> • Club Fundraising – does or will your club have a specific fundraising event or will it give a percentage of its general fundraising to TRF? District 9930's goal is for all clubs to give 10% of their fundraising to the Annual Fund and 10% to PolioPlus, keeping 80% for local club based projects. What does your club do now and is that working? Do you want to do something different? • Personal Giving – do you know how many members in your club currently give personally to TRF? What are your goals in terms of personal giving? How will you support your members to give personally to TRF? Clubs have a number of different ways they encourage and support personal giving, so talk with other PEs about how it works in their clubs for ideas. • Identify and appoint your TRF Chair/Champion for your year – this way you can share the workload with regard to TRF matters. • Possible district grant project – what projects could your club consider undertaking that would qualify for a district grant? Perhaps get a small team together to start coming up with ideas, and to then put together the grant application/proposal. The proposal is due 31 August 2018, so it is important that you start working on it now as that is only two months after you take office. • If your club wants to consider a global grant project (can be applied for at any time) there can be quite a lead time planning for and applying for global grants so if it is something you want your club to do in your year, start thinking about it now and sound out the District TRF Chair in terms of how the district can support it. • As soon as you have completed PETS 1, register (if you haven't already) on MyRotary on the Rotary International website and start becoming familiar with Rotary Club Central (RCC). You can see information on membership, TRF giving etc for your club (all club members can do this) so you can start getting a good understanding of your club's situation. As soon as you have appointed a TRF Chair/Champion, register them on RCC so they will start getting relevant information from Rotary International and TRF. • Register for SP PETS |

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| <p>SP PETS March 2019</p> | <ul style="list-style-type: none"> • While at SP PETS look out for potential district or global grants projects especially with the Pacific Island clubs. • Following SP PETS, continue your thinking about grants – if you want your club to apply for a district grant and you haven't yet set up a team to work on this, then you should do that now. • Continue to think about your fundraising targets for the club – will you fundraise specifically for the club's contribution to TRF or will you put aside a percentage of the general fundraising income? • If you haven't already, appoint your TRF Chair/Champion so they can start thinking about TRF activities and priorities for the year and assist you with TRF matters. • If your club intends to apply for global or district grants it must be qualified – the first step in this is to have at least one member of your club – probably your TRF Chair/Champion – attend the grant management seminar run at district assembly 4th May. Let them know the date and your expectation that they attend as soon as you can. Alternatively, have one of your members complete and pass the on-line grant management seminar at http://www.classmarker.com/online-test/start/?quiz=hmh5962c72486a05 • November is Foundation Month and that is a good time to have a speaker from the District Rotary Foundation Committee on your programme, or some other way of reminding/educating members about the work TRF does and the way it is funded (through club and personal contributions). |
| <p>District Assembly 4th May 2019</p> | <ul style="list-style-type: none"> • As noted above, if the on-line grant management seminar is not taken up, ensure that at least one member of your club attends the grants management seminar run in conjunction with District Assembly. This will most likely be your TRF Chair/Champion. There are two parts to the seminar and they need to attend both parts on that day, so they will not be able to attend other breakout sessions at the same time. • Completing and passing the on-line grant management seminar or attendance at the grants management seminar is a requirement for your club to become qualified to receive grant funds in the form of district grants or global grants. |
| <p>April – August 2019</p> | <ul style="list-style-type: none"> • Complete the Club Memorandum of Understanding (MOU) on grant management and submit this to the District TRF Chair. It must be completed before you can apply for a district or global grant. • If you plan to apply for a district grant, get your grants team (put one together if you haven't already) to work on identifying the project, preparing the application, budget, project plan etc. |
| <p>By 30th April 2019</p> | <ul style="list-style-type: none"> • Check with this year's President that the club has submitted its 2018-19 TRF contributions via the District 9930 TRF Administrator. Payments sent after this date may not be received by TRF in time to be recognised in the 2018-19 Rotary year. |

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| By 30 th June 2019 | <ul style="list-style-type: none"> • Submit the club's goals for contributing to TRF for 2019-20. This is done in Rotary Club Central (RCC). Setting your goals is a requirement to be eligible for a district grant. • You may not have full editing access to RCC on the Rotary International website until 1st July, so you may need to work with your club's current secretary or president who will have access until 30th June 2019 to help you with this. • Make sure that the name of your TRF Chair/Champion (and all your other club officers) is entered into the list of club officer holders (go to www.rotary.org click on 'manage' and then on 'club/district administration'). • Have your district grant project application completed and ready to be approved by your new board at its first meeting in July. |
| 2019-20 – AS PRESIDENT: | |
| July/August 2019 | <ul style="list-style-type: none"> • Get sign off from your new board for the district grant application |
| 31 st August 2019 | <ul style="list-style-type: none"> • Submit the club's district grant application to Grants Sub Committee Chair. Grants will be acknowledged by the Grants Chair so if you don't get an acknowledgement please follow up to ensure it has been received. • Note that progress on district grants projects are required to be reported on to the Grants Sub Committee Chair three months after the club receives its first funds (which is usually around Oct/Nov) and six monthly after that. Generally, district grants are completed in the Rotary year they are granted. |
| November 2019 | <ul style="list-style-type: none"> • Rotary Foundation Month – have a member of the District Rotary Foundation Committee speak to your club about TRF (have your programme coordinator work on this a few months ahead of time to ensure a suitable time is available). • Consider making a part payment of your club's budgeted contributions to the Annual Fund and PolioPlus during Foundation Month |
| 30 th April 2020 | <ul style="list-style-type: none"> • Ensure your club has made its final contributions to the Annual Fund and PolioPlus (to the District 9930 TRF Administrator) by the end of April so that it is recognised your Rotary year. |

2. DISTRICT GRANTS

Information about District 9930 District Grants is contained in the following documents:

- 2019-20 District Grants Criteria & Guidelines
- 2019-20 District Grants Timelines
- District Grant Proposal Application Form
- 2019-20 Club Qualification MOU including D9930 requirements

All of these documents will be available on the District 9930 website – go to The Rotary Foundation page and click on FOUNDATION FORMS AND DOWNLOADS and look under the heading **District Grants** or use this link: <http://rotary9930.org/Page/rotary-foundation-forms-downloads>

Please make a point of downloading the information after SP PETS so that you can work on planning for your district grant project. Please also note the reporting requirements as timely reporting is a requirement of all grants.

3. MAKING CLUB CONTRIBUTIONS

Clubs are encouraged to make half of their contributions to TRF in November and the other half in April.

District 9930 asks clubs to contribute 10% of the clubs annual fundraising efforts to the Annual Fund and 10% to Polio Plus, keeping 80% for their own club projects.



Some clubs will decide to have specific fundraising events for TRF and other clubs will decide to contribute a portion of their general fundraising. Clubs can also order certificates of appreciation at the cost of \$10.00 each, to give to guest speakers. Upon purchase, the \$10.00 is forwarded to TRF for credit to the club's annual giving amount. The certificate records that the club has contributed to Polio Plus on behalf of the speaker. Certificates can be ordered from the Polio Plus Chair Michelle Tanner (see contact details below).

For club giving, the Club Treasurer should use the **Multiple Donor form**, using just the first line in the table for listing contributors. If individual members are also making personal contributions, they can be listed below that. The Multiple Donor form can be found on The Rotary Foundation page of the D9930 website. Click on FOUNDATION FORMS AND DOWNLOADS and look under the heading **Club and Member Contributions** or use this link: <http://rotary9930.org/Page/rotary-foundation-forms-downloads>

Contributions can be sent by cheque made out to District 9930 posted along with the Multiple Donor form or by way of a direct deposit with the club name and programme (Annual Fund or Polio Plus) included in the references. In the case of a direct deposit, the Multiple Donor form should be emailed or posted to the District 9930 TRF Administrator to ensure correct attribution of funds.

It is important that all contributions are supported by a completed form submitted to the District 9930 TRF Administrator so that payments can be properly credited to the club and/or individual Rotarian and to the right fund (Annual fund or Polio Plus).

4. MAKING PERSONAL CONTRIBUTIONS AND PERSONAL GIVING RECOGNITION PROGRAMMES

Individual contributions are identified separately from club contributions although they are included in the total contribution the club makes. The goal for individual contributions is “Every Member, Every Year”, that is, every individual Rotarian commits personally to supporting TRF every year.



Individuals who commit to contributing NZ\$100 every year are recognised as Centurions.

Individuals who commit to contributing US\$100 every year are recognised as sustaining members.



Individuals who commit to contributing US\$1,000 every year are recognised as Paul Harris Society members.

Individual contributions can be processed by any of the following means:

1. Individual Rotarians can give their contributions to their Club Treasurer to submit using the **Multiple Donor Form** (as described above). The club must list the Rotarian on the form to ensure they get recognition.
2. Individual Rotarians can submit contributions using the **Individual Donor form** and either send the form with a cheque to the District 9930 TRF Administrator, or make the deposit via a direct deposit and email or post the form.
3. Individual Rotarians can make regular automatic payments through their bank by completing an **Automatic Payment order** which notifies the bank of the desired amount and schedule of the automatic payments.

The Individual Donor form and Automatic Payments form can be found on The Rotary Foundation page of the D9930 website. Click on FOUNDATION FORMS AND DOWNLOADS and look under the heading **Club and Member Contributions** or use this link: <http://rotary9930.org/Page/rotary-foundation-forms-downloads>

Clubs have different ways to encourage and support individual contributions, for example providing members with a Flat White a Week Mug (contact Maketu Rotary for more information) to collect funds during the year, invoicing members along with club subscriptions (although payment of that portion is voluntary), or continuing to charge members for missed meals and contributing that to TRF. Whatever methods are used it is important to track each member's contributions to ensure that they get recognition for all of their personal contributions. Once their total contributions have reached US\$1,000 (and each \$1,000 thereafter) they will be recognised by TRF as a Paul Harris Fellow.

In making personal and club donations, it is important to state the fund that the contribution should be attributed to – either the Annual Fund or Polio Plus.

Personal contributions to TRF are tax deductible and the District 9930 TRF Administrator will issue a tax receipt at end of each year financial year.

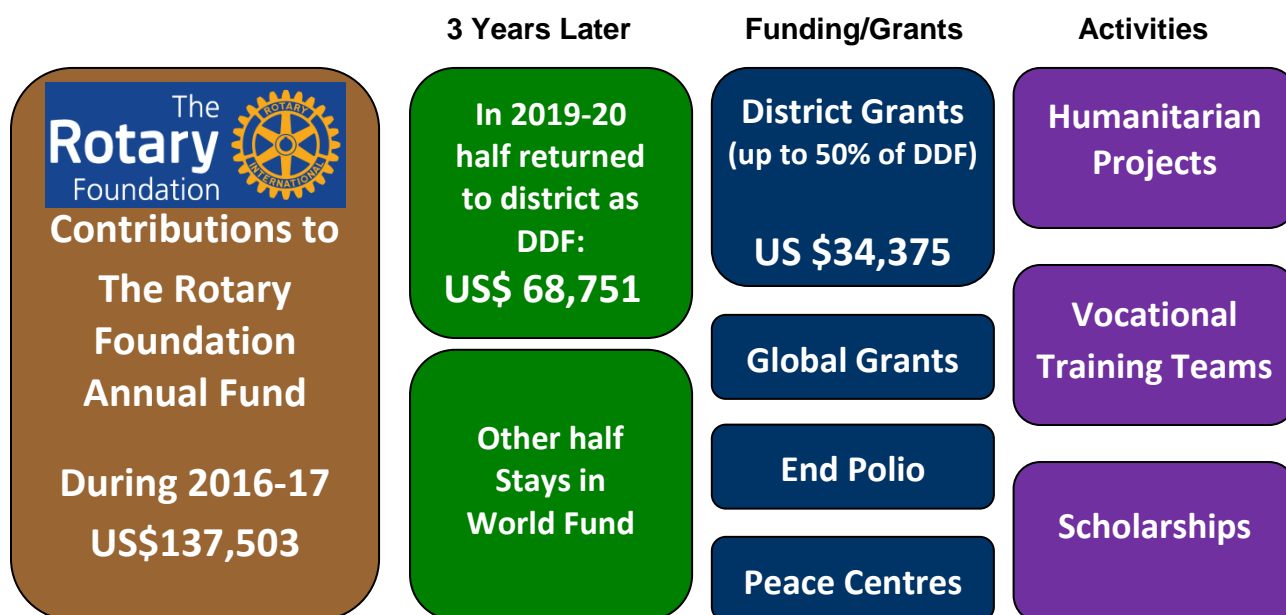
5. SETTING ROTARY FOUNDATION GOALS IN ROTARY CLUB CENTRAL

Setting the clubs goals for contributing to TRF is an important part of the President's planning and sets a target to achieve. It is also a prerequisite for receiving a district grant.

Instructions are provided in the document entitled: “Setting Rotary Foundation Goals” – go to The Rotary Foundation page and click on FOUNDATION FORMS AND DOWNLOADS or use this link:

<http://rotary9930.org/Page/rotary-foundation-forms-downloads>

6. HOW THE FUNDING WORKS



Contributions to the Annual Fund of TRF are invested for three years after which 50% of what our district gave (the sum of all individual and club contributions) comes back to our district as district designated funds (DDF) and we can choose how we utilise these funds to make a difference in the world. We can use up to half of it for district grants – smaller, more local projects that clubs are undertaking. Of the balance, our district gives 20% back to the Polio Plus campaign and the remainder is available to contribute to peace centres or to use for global grants. Club and individual contributions to Polio Plus go straight to work eliminating polio and are not part of this investment cycle.

In the 2019-20 Rotary year the DDF coming back to the district is US\$68,751 – this is because in 2016-17 US\$137,503 was given by District 9930 to the Annual Fund of TRF. Half of the DDF (US\$34,375) is available to be distributed to clubs in the form of district grants, with the balance being used to support district or club initiated global grants to fund humanitarian projects, scholarships or VTTs or as contributions to polio or the Rotary Peace Centres. Each year the District Governor determines the distribution of DDF across these options.

Essentially there are three types of activities that can be funded by global or district grants – most of the community based projects that clubs carry out fall under the heading of humanitarian projects but clubs and the district can also use grants to undertake vocational training team projects or to offer scholarships.

7. PHF RECOGNITION POINTS AND HOW TO ORDER PHFs

During your year as President you may wish recognise the work of members or non-members with a Paul Harris Fellow (PHF). The club must have sufficient PHF recognition points (Presidents and Secretaries can check this out in Rotary Club Central).

Recognition points come from the club's giving to TRF and every US\$1,000 provides sufficient recognition points for one PHF. Clubs need to take into account the exchange rate to ensure it contributes sufficient funds in US dollars to achieve PHF recognition. Most clubs who have regularly contributed to TRF will have a balance of recognition points build up over time to enable them to award PHFs.

Clubs need to request a PHF by completing the Paul Harris Fellow Recognition Transfer Form found on the Rotary International website: <https://www.rotary.org/myrotary/en/take-action/give/recognition> (scroll down the screen to find the form in the list of resources). This form can also be accessed on the D9930 website from The Rotary Foundation page - click on FOUNDATION FORMS AND DOWNLOADS under the heading **Club and Member Contributions** or use this link: <http://rotary9930.org/Page/rotary-foundation-forms-downloads>.

Allow at least two to three weeks for the request to be processed and longer at changeover time as the number of requests to be processed at this time of the year is substantial – it is wise to make your request six weeks before changeover.

8. FURTHER INFORMATION

Additional information on any of these topics can be found on the Rotary International website www.rotary.org or the Rotary Foundation pages of the District 9930 website <http://rotary9930.org/Page/rotary-foundation>.

This 'mini-manual' and all of the documents referred to in it can be found on the District 9930 website <http://rotary9930.org/Page/rotary-foundation-forms-downloads>.

You can also contact:

District 9930 TRF Chair (2019-22)
David Campbell (Maketu)
Email: dcampbell@maketu.nz
Mobile: 027 314 9850

District 9930 Polio Chair
Michelle Tanner (Matamata)
Email: michelle.tanner59@gmail.com
Mobile: 027 722 5599

District 9930 Grants Chair
Alan Hitchcock (Tauranga Te Papa)
Email: alan.hitchcock@xtra.co.nz
Mobile: 021 280 0000