



# Foundation *FOCUS*

Quarterly Newsletter of District 7710

Issue #2

November 2015

**(Editor Note: We apologize for not getting this published in November as planned)**

Welcome to the second edition of the Foundation Focus a resource for Rotarians in District 7710. November is Foundation month in the Rotary calendar so this issue provides the basics on the Foundation.

The February issue will focus on Rotary's Peace month, with articles highlighting the Peace Center program, our opportunities for direct involvement with the Duke/UNC Peace center and how we can identify potential peace fellows. We will also highlight the second grants training session and grants activity in our district

The fourth edition is planned for May and will be a review of Foundation activity at the District Conference, plus an emphasis on ending the Rotary Year on a high note of donation support.

Here are the latest figures from The Rotary Foundation for Worldwide Fund-Raising

Statistics as of 30 June 2015	Number	Amount
Endowment Fund Net Assets		\$ 362 million
Endowment Fund Expectancies		\$ 662 million
Net Assets and Expectancies Total		\$ 1.023 billion
Bequest Society Commitments	10,844	
Bequest Society Expectancies		\$ 564 million
Donor Advised Fund Individual Accounts	95	
Donor Advised Fund Group Accounts	157	
Donor Advised Fund Legacy Accounts	3	
Donor Advised Fund Total Accounts	255	
Donor Advised Fund Fair Market Value		\$ 19 million

## District Statistics for District 7710 as at November 10th 2015

The following statistics were gathered from several different recent Rotary International reports. Club goals can be entered via "Club Central". The chart will be updated throughout the year.

Rotary International depends on clubs informing them of the status of Sustaining Members when the club submits a "block" report for its members. There may be instances where this information has not yet been shared, which will affect the numbers shown in the "Sustaining Members" column.

In the following chart:

SM = Sustaining Members PHF = Paul Harris Fellows and PHS is Paul Harris Society

Club	SM	PHF	PHS	Major Donors	Benefactors	Bequest Society	Annual Fund Goal	Polio-plus goal
Anqier	1	6	0	1	1	0	20	0
Apex	22	18	0	0	0	0	3,425	100
Apex Sunrise	23	8	2	0	0	0	3,250	500
Capital City – Raleigh	22	30	1	1	6	2	0	0
Cary	32	87	9	1	6	2	20,000	2,000
Cary Central	15	19	2	2	9	0	6,250	0
Cary MacGregor	57	50	2	3	4	0	11,160	0
Cary-Kildaire	27	24	1	4	3	0	8,000	1,500
Cary-Page	41	31	3	1	7	0	9,800	1,000
Central Johnston	28	49	1	0	5	1	3,360	500
Chapel Hill	15	30	1	4	4	2	6,000	0
Chapel Hill-Carrboro Sunrise	21	22	2	1	5	2	7,100	0
Clayton Mid-Day	1	4	0	0	0	0	5,600	500
Clayton	49	35	2	1	1	0	15,890	2,500
Cleveland School	6	3	0	0	0	0	1,200	100
Crabtree	1	29	1	0	1	0	0	0
Dunn	38	31	0	0	0	0	0	0
Dunn-Erwin	24	19	1	0	1	0	5,850	150
Durham	131	116	20	3	9	5	0	0
Durham Sunrise	10	6	0	0	1	0	0	0
East Chapel Hill	143	71	0	4	3	2	0	0
E-Club.D7710	0	2	0	0	0	0	0	0

Club	SM	PHF	PHS	Major Donors	Benefactors	Bequest Society	Annual Fund Goal	Polio-plus goal
Fuquay-Varina	3	7	0	0	0	0	6,550	500
Fuquay-Varina Downtown	9	5	0	0	0	0	1,100	500
Garner	38	25	0	0	1	1	5,200	500
Garner Mid-Day	20	13	1	1	2	0	3,200	0
Henderson	30	22	2	1	0	0	2,300	0
Hillsborough	8	12	4	4	5	2	5,650	1,000
Holly Springs	16	12	0	0	1	0	2,300	0
Lillington	10	7	1	0	1	1	0	0
Morrisville	0	11	0	0	1	0	7,375	200
North Durham	0	11	2	0	2	1	15,850	400
North Raleigh	6	42	6	2	7	1	18,000	3,000
Oxford	34	22	3	2	7	1	10,600	0
Raleigh	76	60	1	4	3	1	20,000	1,000
Raleigh Midtown	4	6	2	0	1	0	2,000	0
Research Triangle Pk.	18	11	1	0	0	0	4,000	250
Roxboro	35	25	2	2	2	0	6,000	500
Smithfield	13	3	0	1	0	0	300	0
South Granville Co.	8	6	0	0	2	1	3,350	1,800
Southwest Durham	33	27	3	0	1	1	4,200	1,000
Wake Forest	32	24	6	3	1	0	36,000	3,000
Wakefield / Wake Forest	23	14	2	1	1	1	4,200	500
Warrenton	1	9	1	1	1	1	5,800	500
Wendell	14	12	0	0	0	0	5,000	0
West Raleigh	44	43	1	1	6	1	9,225	250
Zebulon	4	8	0	0	0	0	0	0
<b>District Summary</b>	<b>1,185</b>	<b>1,123</b>	<b>85</b>	<b>48</b>	<b>112</b>	<b>30</b>	<b>285,105</b>	<b>23,750</b>

SM = Sustaining Members PHF = Paul Harris Fellows and PHS is Paul Harris Society

## Making a Difference through Global Grants

When the Cary-Kildaire Rotary Club put together its Future Vision Plan some years ago, they stressed the importance of having a community somewhere in the world where they would do multiple projects. Rajkot (Gujarat) India turned out to be that community.

They have completed a total of five matching and global grants with the clubs in Rajkot (with more in the planning stages). The current Global Grants totaled \$100,000 of which the Cary Kildare club and private donors funded \$10,000.

Another Global Grant provided funding for 10 dialysis machines to B.T. Savani Kidney Hospital. The hospital runs a fully-fledged Dialysis Center with 32 machines and works from 6.00am till 8.00pm in three shifts. Despite this high volume of dialysis available, patients often wait up to a week for treatment. The hospital treats all patients, but favors those of low income groups irrespective of religion, cast and creed.



The additional 10 machines will be able to deliver between 25 and 30 additional dialysis treatments per day, which works out to 9,000-9,500 dialysis treatments per year.

A previous grant provided a 4D color Doppler project, in which Cary-Kildaire was the lead international club, and had financial support of the Lillington and Chapel Hill-Carrboro Sunrise Rotary Clubs



All of these projects have been water or medical projects. Cary-Kildaire member, Manu (Doc) Domadia, and his wife Pramila are natives of Rajkot and know the community well. They have good contacts in the Rotary Clubs and medical community. Most importantly, Doc and Pramila visit every project the Cary-Kildaire club does in Rajkot during their annual trip to India (January through March). They visit the site of every project every time they go and they bring back progress reports.

## History of The Rotary Foundation

At the 1917 Rotary International Convention, outgoing RI President Arch C. Klumph proposed to set up an endowment “for the purpose of doing good in the world.” In 1928, it was renamed The Rotary Foundation, and it became a distinct entity within Rotary International.

## Growth of the Foundation

In 1929, the Foundation made its first gift of \$500 to the International Society for Crippled Children. The organization, created by Rotarian Edgar “Daddy” Allen, later grew into Easter Seals.

When Rotary founder Paul Harris died in 1947, contributions began pouring in to Rotary International, and the Paul Harris Memorial Fund was created to build the Foundation.



Arch Klumph

## Evolution of Foundation programs

- 1947: The Foundation established its first program, Fellowships for Advance Study, later known as Ambassadorial Scholarships.
- 1965-66: Three programs were launched: Group Study Exchange, Awards for Technical Training, and Grants for Activities in Keeping with the Objective of The Rotary Foundation, which was later called Matching Grants.
- 1978: Rotary introduced the Health, Hunger and Humanity (3-H) Grants. The first 3-H Grant funded a project to immunize 6 million Philippine children against polio.
- 1985: The PolioPlus program was launched to eradicate polio worldwide.
- 1987-88: The first peace forums were held, leading to Rotary Peace Fellowships.
- 2013: New district, global, and packaged grants enable Rotarians around the world to respond to the world's greatest needs.

Since the first donation of \$26.50 in 1917, the Foundation has received contributions totaling more than \$1 billion.

## Mission of the Foundation:

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

The Foundation is a not-for-profit corporation supported solely by voluntary contributions for Rotary members and friends of the Foundation.



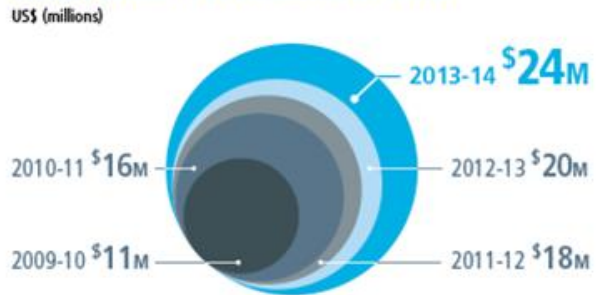
## Financial information about The Rotary Foundation

Rotary is an organization you can trust and support with confidence. Approximately 90 percent of The Rotary Foundation's total spending goes to programs.

### LARGEST ANNUAL FUND EVER



### STEADY GROWTH IN ENDOWMENT FUND



### THE ROTARY FOUNDATION'S EXPENDITURES WENT TO ...



The Rotary Foundation earned a top rating of four stars from Charity Navigator. This top distinction is the seventh in a row received by the Foundation, placing it in the top 3 percent of U.S.-based charities.

*"This 'exceptional' designation differentiates The Rotary Foundation from its peers and demonstrates to the public it is worthy of their trust."*

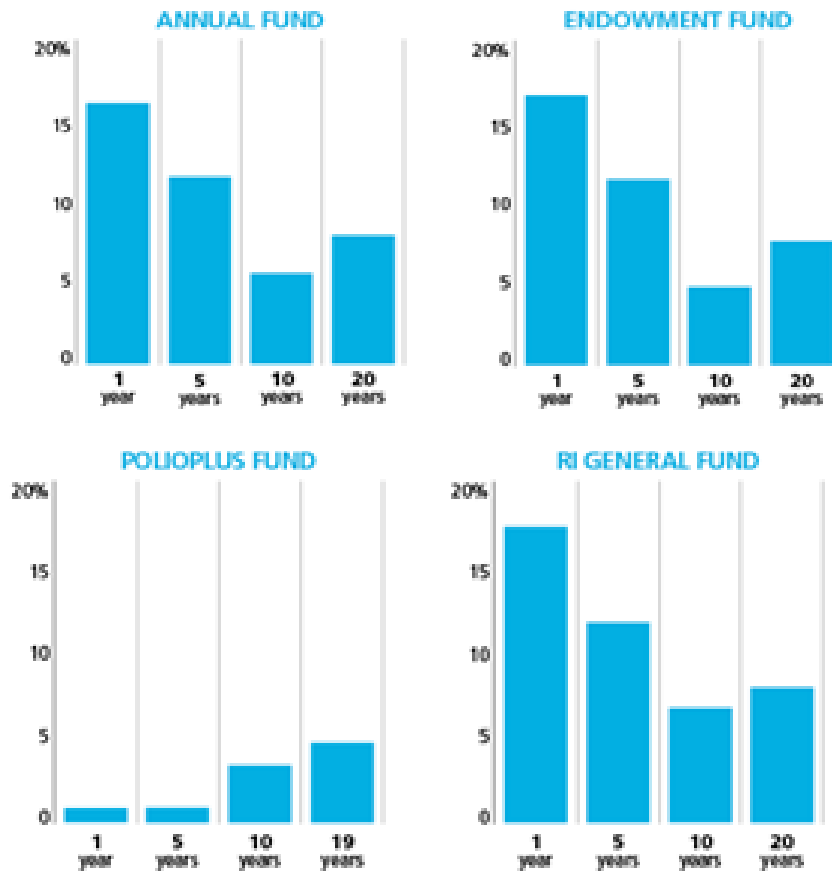
Charity Navigator President and CEO Ken Berger



**TOTAL PROGRAM EXPENDITURES BY REGION**  
(2013-14, in thousands of U.S. dollars)



**ANNUALIZED INVESTMENT RETURNS**





Doing Good In The World



## How the ROTARY FOUNDATION WORKS

The Rotary Foundation transforms your gifts into projects that change lives both close to home and around the world. As the charitable arm of Rotary, we tap into a global network of Rotarians who invest their time, money, and expertise into our priorities, such as eradicating polio and promoting peace. Foundation grants empower Rotarians to approach challenges such as poverty, illiteracy, and malnutrition with sustainable solutions that leave a lasting impact.

Strong financial oversight, a stellar charity rating, and a unique funding model mean that we make the very most of your contribution.

The collective leadership and expertise of our 1.2 million members helps us tackle some of the world's biggest challenges, locally and globally. We are united by common values and vision for the future as we sharpen our focus with targeted specific causes that will reach communities most in need.

For more than 100 years, our guiding principles have been the foundation upon which our values and tradition stand. The Four-Way Test, Object of Rotary, and the Avenues of Service express our commitment to service, fellowship, diversity, integrity, and leadership.

## GUIDING PRINCIPLES

These principles have been developed over the years to provide Rotarians with a strong, common purpose and direction. They serve as a foundation for our relationships with each other and the action we take in the world.

## OBJECT OF ROTARY

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

FIRST: The development of acquaintance as an opportunity for service;

SECOND: High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

THIRD: The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH: The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.



## THE FOUR-WAY TEST

The Four-Way Test is a nonpartisan and nonsectarian ethical guide for Rotarians to use for their personal and professional relationships. The test has been translated into more than 100 languages, and Rotarians recite it at club meetings:

Of the things we think, say or do

1. Is it the TRUTH?
2. Is it FAIR to all concerned?
3. Will it build GOODWILL and BETTER FRIENDSHIPS?
4. Will it be BENEFICIAL to all concerned?



## AVENUES OF SERVICE

We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.

- Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.
- Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society. Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities.
- International Service exemplifies our global reach in promoting peace and understanding. We support this service on international projects, seeking partners abroad, and more.
- Youth Service recognizes the importance of empowering youth through Rotaract, Interact, Rotary Youth Leadership Awards, and Rotary Youth Exchange.



We direct our efforts in six areas to enhance our local and global impact. Our most successful and sustainable projects and activities tend to fall within the following areas:

- Promoting peace
- Fighting disease
- Providing clean water
- Saving mothers and children
- Supporting education
- Growing local economies

We have identified specific causes to target to maximize our local and global impact. At the same time, we understand that each community has its own unique needs and concerns.

Through global grants and other resources, we help clubs focus their service efforts in the following areas.

## **PROMOTING PEACE**

Today, 42 million people are displaced by armed conflict or persecution. Through our partnerships with several leading universities, Rotary Peace Fellows develop the skills to strengthen peace efforts, train local leaders to prevent and mediate conflict, and support long-term peace building in areas affected by conflict. We provide up to 100 peace fellowships per year at Rotary Peace Centers.

## **FIGHTING DISEASE**

More than 100 million people are pushed into poverty each year because of medical costs. We aim to improve and expand access to low-cost and free health care in underdeveloped areas. Our members educate and mobilize communities to help prevent the spread of major diseases such as polio, HIV/AIDS, and malaria. Many of our projects ensure that medical training facilities are located where the workforce lives.

## **PROVIDING CLEAN WATER**

More than 2.5 billion people lack access to adequate sanitation facilities. At least 3,000 children die each day from diarrheal diseases caused by unsafe water. Our projects give communities the ability to develop and maintain sustainable water and sanitation systems and support studies related to water and sanitation.

## **MOTHERS AND CHILDREN**

At least 7 million children under the age of five die each year due to malnutrition, poor health care, and inadequate sanitation. To help reduce this rate, we provide immunizations and antibiotics to babies, improve access to essential medical services, and support trained health care providers for mothers and their children. Our projects ensure sustainability by empowering the local community to take ownership of health care training programs.

## **SUPPORTING EDUCATION**

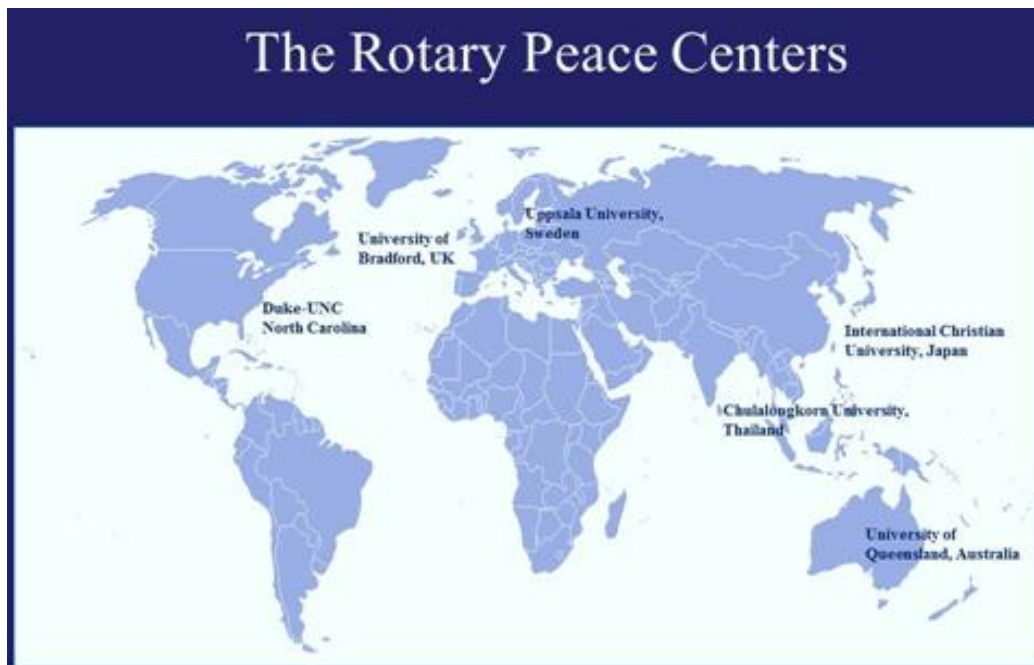
Sixty-seven million children worldwide have no access to education and more than 775 million people over the age of 15 are illiterate. Our goal is to strengthen the capacity of communities to support basic education and literacy, reduce gender disparity in education, and increase adult literacy.

## **GROWING LOCAL ECONOMIES**

Nearly 1.4 billion employed people live on less than \$1.25 a day. We carry out service projects that enhance economic and community development and develop opportunities for decent and productive work for young and old. We also help strengthen local entrepreneurs and community leaders, particularly women, in impoverished communities.

## The Rotary Peace program

Through academic training, study, and practice the Rotary Peace Centers program develops leaders who become catalysts for peace and conflict prevention and resolution in their communities and around the globe. Graduates of the program are reintegrating refugees in Sudan, creating jobs for disadvantaged women in India, and supporting reconstruction in devastated regions of the world.



## Rotary Peace Centers

Each year, up to 100 Rotary Peace Fellows are chosen to participate in a master's degree or certificate program at one of our partner universities. Fellows study subjects related to the root causes of conflict and explore innovative solutions that address real-world needs. We have peace centers around the globe at:

- Chulalongkorn University, Thailand (certificate program)
- Duke University and University of North Carolina at Chapel Hill, USA
- International Christian University, Japan
- University of Bradford, England
- University of Queensland, Australia
- Uppsala University, Sweden

## What are Rotary Peace Fellowships?

Each year, Rotary selects up to 100 individuals from around the world to receive fully funded academic fellowships at one of our peace centers. These fellowships cover tuition and fees, room and board, round-trip transportation, and all internship and field-study expenses. Two types of peace fellowships are available.



## Master's Degree

We offer master's degree fellowships at premier universities in fields related to peace and conflict prevention and resolution. Programs last 15 to 24 months and require a practical internship of two to three months during the academic break. Each year, we award up to 50 master's degree fellowships at these institutions:

## Professional Development Certificate

For experienced professionals working in peace-related fields who want to enhance their professional skills, we offer a three-month program in peace and conflict prevention and resolution at Chulalongkorn University in Thailand. This program incorporates two to three weeks of field study. We award up to 50 certificates each year.

## Peace Fellowship Application

Each year, Rotary funds some of the world's most dedicated and brightest professionals to study at Rotary Peace Centers. Through training, study, and practice, Rotary Peace Fellows become leaders and catalysts for peace and conflict resolution; many go on to careers in national governments, NGOs, the military, law enforcement, and international organizations like the United Nations and World Bank.

*"The world is in great need of more peace fellows who can work hand in hand with governments and communities to counterbalance the outbreak of war and conflict."*

– Abu Sufian Taj Ellassfia, 2011-13 Rotary Peace Fellow

We are no longer accepting applications for the 2016-17 Rotary Peace Fellowships program. Applications for 2017-18 fellowships will be available early December.

## Eligibility requirements

The Rotary Peace Fellowship is designed for professionals with work experience in international relations or peace and conflict prevention and resolution. Our fellows are committed to community and international service and the pursuit of peace.

Applicants must also meet the following requirements:

- Proficiency in English; proficiency in a second language is strongly recommended
- Strong commitment to international understanding and peace as demonstrated through professional and academic achievements and personal or community service
- Excellent leadership skills
- Master's degree applicants: minimum three years of related full-time work or volunteer experience, bachelor's degree
- Certificate applicants: minimum five years of related full-time work or volunteer experience, strong academic background

## Eligibility restrictions

Rotary Peace Fellowships may not be used for doctoral study. Rotary members and their families are not eligible.

Recipients of Rotary Ambassadorial Scholarships or professional development certificate fellowships must wait three years after completion of the scholarship or fellowship to apply for the master's degree program.

## How to promote peace fellowships

Rotary members are vital to recruiting qualified candidates. You can help advance peace in troubled areas around the world by promoting peace fellowships and supporting peace fellow candidates through the application process.

Some of the best candidates for Rotary Peace Fellowships are in your community. Here are some ways you can promote fellowships in your area:

- Make sure your club members are familiar with the Rotary Peace Centers program. The more people there are keeping an eye out for good candidates, the more likely your club is to find one. Give a presentation about the program to your club, or better yet, invite a peace fellow to speak to your club. Find one by contacting me at [barryphillips1314@gmail.com](mailto:barryphillips1314@gmail.com)
- Send a press release about Rotary Peace Fellowships to your local media.
- Meet with community partners. Think about organizations your club already works with, or reach out to like-minded groups or to universities with related programs.
- Use social media. Announce fellowship opportunities to your friends and professional network on Facebook, LinkedIn, and Twitter. You can also follow Rotary Peace Centers on Facebook and repost interesting photos and stories.

## WAYS TO SUPPORT THE ROTARY FOUNDATION

Through the generosity of people like you, our work has made a difference in the lives of millions around the world. Your gift to The Rotary Foundation allows us to improve communities by promoting peace, preventing disease, bolstering economic development, and providing clean water and sanitation.

You can choose to make a one-time gift, or enroll in Rotary Direct, Rotary's recurring giving program, to support our efforts year round.

### 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.

#### Paul Harris Society

Named after Rotary's founder, the Paul Harris Society recognizes Rotary members and friends of The Rotary Foundation who contribute \$1,000 or more each year to the Annual Fund, PolioPlus, or approved global grants. The purpose of the Paul Harris Society is to honor and thank individuals for their generosity of annual support to The Rotary Foundation.

#### What You Gift Supports

With your gift you're promoting peace, fighting disease, providing clean water, saving mothers and children, supporting education, and growing local economies through grants that like:

- Bring peace-building seminars to 200 teachers and 1,300 students in Uganda.
- Distribute insecticide-treated mosquito nets and medical services that help prevent malaria in Mali.
- Train teachers who are establishing an early childhood education center in South Africa.
- Provide water filters, toilet blocks, and hygiene training to prevent fluorosis in a community in India.
- Fund a scholarship for a medical professional to research treatment to minimize mortality rates among premature

How to make a donation by check, draft, or wire payment

Check or draft payments

Please make your check or draft payable to "The Rotary Foundation" for U.S. Send it with the completed form 123 EN to the appropriate address below:

The Rotary Foundation  
14280 Collections Center Dr.  
Chicago, IL 60693, U.S.A.



## **Wire or electronic transfer**

To make a gift by wire or electronic transfer, send your electronic contribution and submit a contribution form 123 EN. It's important we receive the contribution form to record your gift accurately.

You can email your form to [trf.arinquiries@rotary.org](mailto:trf.arinquiries@rotary.org) or fax it to +1-847-556-2139 after the wire has been completed.

## **Securities**

You can donate stocks, mutual funds, or other securities.

Your gift of marketable securities to The Rotary Foundation offers you tax benefits. But more important, it helps the Foundation make an impact for people in need. Donors may transmit gifts of appreciated securities through their broker or by mail. In either case, we ask that you complete a notice of transmittal form.

Contributions to the Donor Advised Fund or to fund Life Income Gifts require separate stock transfer forms. Please contact Planned Giving at +1-847-866-3100 for the proper forms.

## **TRANSMITTING SECURITIES THROUGH A BROKER IN THE UNITED STATES**

Brokers may transfer securities directly to the Foundation's brokerage account using the account information below.

DTC Eligible Securities  
DTC # 0443  
Pershing, LLC  
Account #: N7M100012  
Account name: The Rotary Foundation of Rotary International

Fed Eligible Securities  
ABA # 021-000-018 Fed Eligible Securities  
ABA # 021-000-018  
Bank of NY/Pershing  
Account #: N7M100012  
Account name: The Rotary Foundation of Rotary International

The date securities are received in the Foundation's brokerage account is the date of the gift.

## **Transmitting stocks by mail**

Contact Gift Administration prior to sending any physical stock certificates to verify instructions. All certificates and paperwork must have our account number (N7M100012) written in the right-hand corner.

Stock certificates endorsed to The Rotary Foundation should be sent by registered or insured mail to Pershing/BNY Mellon at the following address.

Pershing LLC  
One Pershing Plaza  
Jersey City, NJ 07399  
Attention: Security Receive Area

If the security is still in the donor's name, the donor must provide a letter of authorization giving up ownership of the security. A donor may also transfer stock by completing a stock power form (available from any broker) and mailing it to Mellon. The signature(s) on the stock power form must match the title on the stock certificate and be signed by all named parties. The stock certificate should remain unsigned and mailed to Mellon in a separate envelope. The postmark date on the envelope is the date of the gift.

See The Rotary Foundation's Gift Acceptance Policy for a complete list of criteria for making gifts of marketable securities, along with the required documents and information.

## **Named gift**

Please read a separate section on "recognition" for a full explanation on named gifts that will support Rotary's future.

## **Real estate**

Making a gift of real estate may afford you financial benefits. Gifts of real estate may include land both improved and unimproved, detached single-family residences, condominiums, apartment buildings, rental property, commercial property, farms, and gifts subject to a retained life estate. Upon review and approval by the Gift Acceptance Committee, the Foundation may accept ownership of outright gifts of real estate with a minimum appraised value of \$25,000 when undeveloped and \$100,000 when developed. In accordance with this Policy, the Foundation will liquidate such gifts as soon as possible after receipt (except in the case of gifts subject to a retained life estate).

The Gift Acceptance Committee of The Rotary Foundation publishes a very comprehensive Gift Acceptance Policy that covers what a potential Donor needs to know about donations of Real Estate

## Employee matching gift

Double the impact of your gift by asking your employer to match your contribution to The Rotary Foundation. More than 15,000 companies match gifts to the Foundation, including many international corporations. Find out if your employer does at [www.rotary.org/matchinggifts](http://www.rotary.org/matchinggifts).

Contact your human resources department to learn if your company is eligible for the program. If it is eligible, request a matching gift form from your employer, and send it completed and signed with your gift. The Rotary Foundation will do the rest. The impact of your gift to our organization may be doubled or possibly tripled! Some companies match gifts made by retirees and/or spouses.

You can send your company's matching gift form directly to:

The Rotary Foundation of Rotary International  
Attn: Corporate Matching Gifts  
1560 Sherman Avenue  
Evanston, IL 60201 USA  
Email: [apf@rotary.org](mailto:apf@rotary.org)  
Fax: +1-847-328-5260

## Rotary credit card

You can promote Rotary and help support our Foundation with the [Rotary credit card](#). A portion of each purchase you make with the card will benefit The Rotary Foundation, at no additional cost to you. The Rotary Foundation has received more than \$8.6 million from the program since it launched in 2000, including \$3.6 million to support [polio eradication](#).

Enjoy 1% cash back on every purchase, and 2% cash back at grocery stores and 3% cash back on as for the first \$1,500 in combined purchases in those categories each quarter. Bank of America donates \$75 toward polio eradication with every activated account. You can participate in the United Airlines Mileage Plus Charity Miles Program.

## Endowment fund

Establish your legacy by ensuring The Rotary Foundation can meet the world's vital needs for generations to come. Your gift helps us prevent disease, promote peace, and advance communities well into the future.

### How does the Endowment Fund work?

A portion of available earnings from our Endowment Fund supplements Foundation activities and helps strengthen our future commitments. Your contributions are invested in perpetuity. A percentage of the total value of the Endowment Fund is spent annually to benefit current and future Foundation grants and programs. The Foundation has set a goal of \$2.025 billion in Endowment Fund assets and gift commitments by 2025.

The Foundation has recognition opportunities for your gift that include: Benefactor, Bequest Society membership, Major Donor and Arch Klumph Society membership.

## RECOGNITION

Your generous contributions to The Rotary Foundation are essential to securing and growing Rotary programs throughout the world. We recognize donors to express our gratitude for your commitment and offer individual and club recognition, as well as naming opportunities that let you honor a friend or family member with a named or endowed gift.

### INDIVIDUAL RECOGNITION

- **Sustaining Member**, when you give \$100 or more per year to the Annual Fund.
- **Benefactor**, when you include the Endowment Fund as a beneficiary in your estate plans or when you donate \$1,000 or more outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.
- **Paul Harris Fellow**, when you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. You can give the amount in your name or in another name. You are recognized as a Multiple Paul Harris Fellow with each additional gift of \$1,000.
- **Paul Harris Society** member, when you give \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant.
- **Bequest Society** member, when you give \$10,000 or more via your estate plans. All society members receive recognition from the Trustees of The Rotary Foundation, and donors can choose to receive an engraved crystal recognition piece and a Bequest Society pin. Recognition items commemorate giving at these levels:
  - Level 1: \$10,000 to \$24,999
  - Level 2: \$25,000 to \$49,999
  - Level 3: \$50,000 to \$99,999
  - Level 4: \$100,000 to \$249,999
  - Level 5: \$250,000 to \$499,999
  - Level 6: \$500,000 to \$999,999
  - Level 7: \$1,000,000 to \$2,499,999
  - Level 8: \$2,500,000 to \$4,999,999
  - Level 9: \$5,000,000 to \$9,999,999
  - Level 10: \$10,000,000 and above
- **Major Donor**, when your cumulative donations reach \$10,000. You can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant. Recognition items commemorate giving at these levels:
  - Level 1: \$10,000 to \$24,999
  - Level 2: \$25,000 to \$49,999
  - Level 3: \$50,000 to \$99,999
  - Level 4: \$100,000 to \$249,999

- **Arch Klumph Society**, when your cumulative giving reaches \$250,000. We will invite you to an induction ceremony at the Rotary International headquarters in Evanston, Illinois, USA and include your picture and biography in the Arch C. Klumph Society interactive gallery. You will also receive invitations to society events, along with membership pins and crystals that commemorate giving at these levels:
  - Trustees Circle: \$250,000 to \$499,999
  - Chair's Circle: \$500,000 to \$999,999
  - Foundation Circle: \$1,000,000 to \$2,499,999
  - Platinum Trustees Circle: \$2,500,000 to \$4,999,999
  - Platinum Chair's Circle: \$5,000,000 to \$9,999,999
  - Platinum Foundation Circle: \$10,000,000 and above

## CLUB BANNER RECOGNITION

- **100% Paul Harris Fellow Club**, for clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.
- **100% Paul Harris Society Club**, for clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus, or global grants within a Rotary year
- **100% Foundation Giving Club**, for clubs in which every dues-paying member contributes to The Rotary Foundation, and the average contribution is at least \$100 to any Rotary Foundation gift designation
- **Every Rotarian, Every Year/Sustaining Club**, for clubs in which every dues-paying member contributes at least \$100 to the Annual Fund
- **Top Three Per Capita in Annual Fund Giving**, for the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

## NAMED GIFT OPPORTUNITIES

With an endowed or term gift, you can apply a specific name to your donation. Endowed gifts are invested in perpetuity, while a portion of their earnings are spent on a designated program. Term gifts are spent in their entirety on a specific program over an agreed period of time.

## ENDOWMENT NAMING OPPORTUNITIES

- \$1 million or more: Fund established in consultation with the donor
- \$500,000 or more: Fund that includes a specific area of focus and location
- \$250,000 or more: Fund that specifies the participating district
- \$100,000 or more: Fund that includes a general area of focus
- \$25,000 or more: Fund designated to the World Fund or SHARE

## **TERM GLOBAL GRANTS NAMING OPPORTUNITIES**

- \$30,000: One-time gift designated to an area of focus and may be district specific
- \$15,000: One-time gift designated to an area of focus and available worldwide

## **ROTARY PEACE CENTERS ENDOWMENT OPPORTUNITIES**

- \$1.5 million: One two-year fellow at a Rotary Peace Center every year
- \$1 million: One two-year fellow at a Rotary Peace Center every two years
- \$1 million: A visiting lecturer at a Rotary Peace Center every year
- \$750,000: One two-year fellow every three years
- \$500,000: One two-year fellow at a Rotary Peace Center every four years
- \$250,000: General support to the Rotary Peace Centers at Arch Klumph Society level
- \$250,000: One certificate program fellow every year
- \$100,000: Annual seminar at a Rotary Peace Center every year
- \$25,000 and up: General support to the Rotary Peace Centers endowment

## **ROTARY PEACE CENTERS TERM GIFT OPPORTUNITIES**

- \$75,000: A term two-year Rotary Peace Fellow at a Rotary Peace Center
- \$75,000: Up to 10 applied field internships or research projects for a class of fellows at a Rotary Peace Center
- \$60,000: One year of funding for five certificate program fellows
- \$10,000: General support of the program

## **How are the donations used?**

The donations to the Annual Fund Share are invested by the Rotary Foundation for three years and the revenue from this investment is used to offset the costs of running the Foundation. After three years the principal is divided into two portions, District Designated Funds (DDF) and the World Fund.

### **SHARE**

You can designate the spendable earnings from your endowed gift to SHARE, which makes a portion available to support, club, and district projects.

### **World Fund**

The World Fund provides the necessary funding for our highest priority activities around the globe. Fifty percent of SHARE-designated contributions are applied to the World Fund. You can also designate the spendable earnings from your endowed gift entirely to the World Fund, to be used for critical activities. Our District has access to the World Fund by proposing Global Grants – the WF matches District funding 1;1 and matches club funds 50c on the dollar



## **District Designated Funds (DDF)**

District 7710, through a share committee decides on the best use of DDF. Traditionally half has been allocated to support District Grants with a limitation of \$2,000 per grant project per club; \$25,000 has been used to support the Peace center program and the remainder used to support Global Grant application from the district's clubs. Unused DDF has been donated towards eradicating Polio through the Polio Plus fund which then gets matched 2:1 by the Gates Foundation.

The pattern over the last two years is for an increasing number of Clubs to get involved with DGs either as the lead club or in support of other (area) clubs,

## **Planned giving**

How can you incorporate a gift into your financial or estate planning?

Through a planned gift, donors can provide ongoing support to Rotary programs. Donors can choose structured gifts to be made after their lifetimes, and take advantage of financial and tax benefits, which vary by country.

## **Giving opportunities**

The most common gift structure is a provision in an estate plan. Worldwide opportunities include:

- A provision in a will including codicils
- A provision in a trust
- Insurance beneficiary designations
- Real estate and other asset transfers
- Gifts of retirement plan assets or other financial accounts

## **Tax Benefits**

Individuals who reside in the U.S. or who benefit from U.S. tax opportunities, can structure gifts that may provide financial and tax benefits, such as:

- Charitable Gift Annuity (CGA) (immediate and deferred) minimum age 50. Minimum \$10,000 3% for a 50 year old to more than 7% for a person of advanced years.
- Charitable Remainder Unit Trust (CRUT) a trust that reverts to TRF on death and gives an annual income based on value at year-end and a tax offset on donations.
- Charitable Remainder Annuity Trust (CRAT). Similar to CRUT but annual payouts are for a fixed amount.
- Charitable Lead Trusts.(CLT) They pay the Charitable Organization \$\$ now, and then revert back to the donor after say 15 years.

*Avoid the capital gains tax. Write some of the donation off against this year's taxes and turn some low dividend assets into a life time income that could be 5% or more a year. A true Win-Win-Win situation.*

### **Pooled Income Fund**

The Fund was established in 1983 for donors to support The Rotary Foundation while providing the opportunity for an income stream for the lifetime of the income beneficiaries. The remainder of all gifts received by the Fund ultimately will be placed in The Rotary Foundation's Endowment Fund.

The Fund works like a mutual fund with the commingling of all contributions. Each donor is assigned a number of units based on the fair market value on the date of the contribution. Growth in the Fund depends upon underlying asset performance and new contributions.

### **Donor Advised Fund**

If you own assets that have increased in value since you acquired them and you are facing a capital gains tax bill if you liquidate them for cash, here is an alternative. Consider using Rotary's Donor Advised Fund (DAF).

To learn more about making a planned gift to the Foundation, contact:

Barry Phillips at [barryphillips1314@gmail.com](mailto:barryphillips1314@gmail.com) or

Kent Thompson at [kthompson134@nc.rr.com](mailto:kthompson134@nc.rr.com).

You may also call +1-847-866-3100 or email The Rotary Foundation at [planned.giving@rotary.org](mailto:planned.giving@rotary.org).

The Foundation's tax U.S. identification number is 36-3245072.

The Foundation cannot provide legal or financial advice. We urge you to consult with your legal representative or financial adviser to determine the most appropriate way for you to give.



## 2015/15 activity with District Grants (DG) and Global Grants (GG)

The list of approved DGs along with the associated DDF amounts and total project costs is shown below. The district has allocated \$77,085 in DG DDF to fund 30 DGs with total project costs of \$219,991. Some clubs had more than one DG as well as participating clubs contributed to more than one DG. Of the 30 DGs there were 25 unique sponsoring clubs and 12 unique participating clubs for a total of 37 or 80% of clubs involved in DGs.

	<b>D7710 RY 2015-16 DG Approved Applications</b>	<b>DDF</b>	<b>Total</b>
1	Warrenton - Rotary Clock Project	\$ 2,000.00	\$ 10,000.00
2	Cleveland School - Dictionary for 3rd Graders	\$ 980.00	\$ 1,960.00
3	Oxford - Food Box Project	\$ 3,000.00	\$ 6,042.00
4	Raleigh - Wake Smile Dental Clinic	\$ 2,000.00	\$ 20,000.00
5	Zebulon - Dictionary Project	\$ 375.00	\$ 750.00
6	Wendell - Library Books	\$ 1,000.00	\$ 2,020.00
7	Holly Springs - Music and Memory Project	\$ 2,000.00	\$ 4,000.00
8	East Chapel Hill - Pursuit of Ethics in the Classroom	\$ 2,225.00	\$ 5,150.00
9	Durham - New Teacher Supplies	\$ 4,600.00	\$ 9,200.00
10	Durham Sunrise - Backpack Buddies	\$ 2,900.00	\$ 6,192.00
11	E-Club Durham - Water Project Arusha TZ	\$ 3,105.00	\$ 6,310.00
12	RTP - MLK Meal Packaging Event	\$ 9,050.00	\$ 24,100.56
13	Southwest Durham - Alzheimer's Project	\$ 920.00	\$ 1,840.00
14	Crabtree Valley - Meals on Wheels	\$ 1,600.00	\$ 3,200.00
15	Cary Page - Read and Feed	\$ 2,000.00	\$ 4,000.00
16	Cary Page - Music for Alzheimer's Patients at Woodland	\$ 1,000.00	\$ 2,000.00
17	Clayton Moring - Alzheimer's Music and Memory Project	\$ 7,500.00	\$ 15,000.00
18	Cary Kildaire - Eyes on the Street Passage Home	\$ 2,000.00	\$ 4,000.00
19	Capital City - Homeless Veterans Employment Program	\$ 1,280.00	\$ 2,560.00
20	Lillington - Buddy Backpack Program	\$ 2,000.00	\$ 4,000.00
21	Cary MacGregor - Hope Academy Fence Project	\$ 4,000.00	\$ 8,000.00
22	SW Durham - Hub Farm Causeway	\$ 5,550.00	\$ 13,410.00

23	Cary Page - Memory Café of Cary	\$ 2,000.00	\$ 4,332.00
24	Cary Central - Hooked on Hydroponics	\$ 1,999.91	\$ 3,999.82
25	South Granville County - Backpack Buddies	\$ 750.00	\$ 1,500.00
26	South Granville County - Senior Center Events	\$ 1,250.00	\$ 2,500.00
27	East Chapel Hill - Teachers Supply Store	\$ 6,000.00	\$ 43,125.00
28	Cary - RABGAB	\$ 2,000.00	\$ 4,300.00
29	Clayton - Community Park and Recreation Picnic Benches	\$ 1,200.00	\$ 2,400.00
30	Roxboro - Teacher Supply Store	\$ 2,000.00	\$ 5,500.00
	Total DDF Allocated	\$78,284.91	\$221,391.38
	Total DDF	\$88,641.00	
	Available DDF	\$10,356.09	

Three Global Grants have been approved by District 7710 and ready for The Rotary Foundation's review. TRF has not yet approved these Grants:

- Zimbabwe Eye Project status is "submitted". DDF allocation is \$15,000; total project cost is \$30,000.
- Open Air Plaza in Dominican Republic status is waiting approval for \$15,000; total project cost is \$37,380.
- Seats to Excel in Lusaka Zambia is waiting approval for \$15,000; total project cost is \$42,600.

If all three GGs above are approved by TRF this will result in the allocation of \$45,000 of our GG DDF.

- Vocational Training Team to Brazil on Early Childhood Education. DDF request is \$10,000; total project cost is \$40,000.

Other possible GGs are at early stages of preparation

- Partnerships for Pozos Mexico - Improving Lives through Water, Sanitation and Hygiene The Raleigh has indicated they would be looking for between \$10,051 - \$15,000 in DDF with a total project cost between \$34,600 - \$44,500.
- Proposal Loma Negra Safe Water Project — Peru. This is a proposal from the Cary Kildaire. The GG is being written by the Host Club - Rotary Club Piura Oeste D4465. The request from Cary Kildaire would be \$15,000 in DDF; total project cost is \$47,895.

Summary:

Family Health Day (DG Newman) - <b>Authorized</b>	\$ 2,000
Guatemala Literacy Project (iPDG Matthew) - <b>Authorized</b>	\$ 4,000
Open Air Plaza in Dominican Republic - Central Johnston- <b>Waiting Approval</b>	\$15,000
Seats to Excel in Lusaka, Zambia - Southwestern Durham - <b>Waiting Approval</b>	\$15,000
Zimbabwe Eye Project - Morrisville - <b>Working on Details with TRF</b>	\$15,000
Solarizing Uganda Now - Raleigh Midtown - Working on Proposal	\$15,000
Totals:	\$66,000
GG DDF Budget:	\$77,112
Remaining DDF Balance:	\$11,112

We have “earmarked” \$10,000 for the VTT to Brazil.

### 2014-15 Worldwide Ranking in % Sustaining Members

Worldwide rankings of “% Sustaining Members” for Zone 33 districts last year (2014-15) were not included in the previous issue of this newsletter, and are reported below. Congratulations!

District	% Sustainers	Worldwide Rank
7690	88.5%	3
7770	86.4%	4
<b>7710</b>	<b>73.2%</b>	<b>9</b>

Approximately 25% of the 345 Global Grants approved this Rotary year-to-date address the popular Disease Prevention and Treatment Area of Focus. Basic Education and Literacy, Economic and Community Development, and Water and Sanitation each account for 19% of the total. Maternal and Child Health, and Peace and Conflict Prevention/Resolution, each make up 9% of the total.

## Endowment Fund Gifts Offer Diverse Choices to Donors

Carlos is a Rotarian who lives in North Carolina. Carlos was born in Nicaragua and came of age when communism was sweeping his homeland. As a young man, Carlos fought to preserve freedom in Nicaragua and when the country fell to the Sandinistas he moved to America. Today, Carlos is a successful business owner and active Rotarian. He also has a heart for the children of Nicaragua. Carlos travels to Nicaragua almost every year, often taking groups of Rotarians with him to provide aid to the impoverished.

A few years ago, Carlos had some health problems. Those problems made him realize that he will not be able to personally make those trips forever, and that the needs of Nicaraguan children will continue beyond his time on earth. Carlos also knows that The Rotary Foundation will be here in the future, continuing to provide resources to Rotarians to do good in our world. Carlos realized that as a Rotarian he had a tool in The Rotary Foundation to ensure that the good work he is passionate about can continue forever.

Carlos decided to designate \$250,000 of his life insurance policy to go to The Rotary Foundation for the purpose of endowing a Global Grant to do work in his name in Latin America. The proactive decision Carlos made will ensure that funds are available for Global Grants in his home country forever.

Named Funds can be funded with cash, appreciated stock (an option which may allow the donor to considerably reduce tax liability) or funded via a bequest in the donor's will, living trust, retirement plan beneficiary designation or life insurance beneficiary designation. Gifts made during the donor's lifetime qualify the donor for Major Donor and/or Arch Klumph Society Membership, and gifts funded via bequest or beneficiary designation qualify the donor for Bequest Society Membership.



If you are interested in learning more about a Named Fund with The Rotary Foundation, please contact Carl Davis at [carl.davis@rotary.org](mailto:carl.davis@rotary.org) or (847) 424-5343.



Comments and suggestions about the Foundation Focus can be sent to:

Barry Phillips [barryphillips1314@gmail.com](mailto:barryphillips1314@gmail.com) (919) 643-2451

Terri Black [wsterrib@gmail.com](mailto:wsterrib@gmail.com) (330) 933-4094

Ian Rumbles [rumbles1@gmail.com](mailto:rumbles1@gmail.com) (234) 348-0624