PETS Discussion Leader Guide

Our Rotary Foundation – Saturday, March 14, 2015 8:30 to 10:00 a.m.

At the end of this session, participants will:

- 1. Be inspired to champion The Rotary Foundation.
- 2. Have a working knowledge of basic tenants of The Rotary Foundation.
- 3. Understand the roles of the Club Foundation Chair.
- 4. Appreciate the role of the Club Board in setting, promoting, and monitoring Annual Fund Goals.
- 5. Know where to find resources or more information about The Rotary Foundation, programs, how to support, how to get involved.

Notes for Facilitators

- The goal is to generate enthusiasm, appreciation for the Rotary Foundation. Presidents should be enthusiastic leaders about what TRF does, accomplishes and opportunities that are available.
- Keep in mind that each of our 8 districts uses a different model for District Grants. District applications, terms, deadlines and opportunities are different. Take care not to discuss how your district does things

 it is likely different for most of your audience.
- Focus on why each Rotarian should take pride in supporting the Foundation (rather than getting caught up in discussion of Paul Harris Credits)
- Leave specifics of Foundation Administration expenses for another time referring to our Charity Navigator rating answers this question nicely.

Resources / Handouts:

- Club Fundraising Analysis
- RCC Goal Setting (screen shot)
- The Rotary Foundation: 2014 Facts
- The Rotary Foundation Reference Guide
- Rotary Direct
- http://www.charitynavigator.org/

Minutes	Time	Process Steps	Teaching Method
5 MIN	8:30 - 8:35	Introduction & welcome. Remind participants of evaluation process. Fill out notes section in the center of the Program Book) Use them for the Survey Monkey evaluation that will be sent via e-mail within a week.	

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itotal y	Oun	dation - Saturday, March 14, 2015 6:50 to 10:00 a.i.	1.
25 MIN	8:35 - 9:00	 What is the Mission of The Rotary Foundation? To advance world understanding, goodwill, and peace by improving health, supporting education, and alleviating poverty throughout the world. "Doing good in the world" What makes The Rotary Foundation different from other humanitarian foundations? Rotarians (Clubs & Districts) decide how to spend funds, project decisions are grassroots, not made in by Trustees. Pride in ownership (engagement, involvement) SHARE Concept district grants global grants (match) role of World Fund (re: matching funds) Peace Scholars Targeted approach (Six Areas of Focus) Stewardship is an essential responsibility of all Rotarians' "charity of choice" External assessment of quality (Charity Navigator) Most funds donated go directly to service (not fundraising or administration). Rotary's long term focus. Three year cycle for fund expenditures Commitment to eradicate polio. Endowment The Rotary Foundation is truly international. 	Presentation (as if speaking at a Rotary Club meeting)
10 MIN	9:00 - 9:10	ROTARY FOUNDATION FUNDING PROCESS What are the 3 Funds within TRF?	

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15 MIN	9:10 - 9:25	 What is the role of President & Club Foundation Chair? Create a culture of club & individual support for the Foundation awareness at club meetings using TRF recognitions liaison with district Foundation committee promote opportunities for involvement (grants, projects, district seminars & training) awareness of grant qualification expectations What are various approaches of a Foundation Chair? (Nurturing Steward, Cheerleader, Quiet co-chair, Dramatic Change Agent, etc - others?) What are characteristics of each? How is each different / effective? What is your current Fdn Chair's approach? Is this working? Selecting the right person for the role. How should the club's annual goals be determined? Benefits of goal setting as a decision of the club's board Board's leadership role in Foundation support Using Club Fundraising Analysis Report as a goal-setting tool Entering data on Club Central; role of club budgeted cash in addition to individual contributions Using PHF recognition be used to promote awareness of TRF? (community member, etc) Encouraging support	Goal setting form (RCC) Club Fundraising Analysis		
		Club support as part of annual budgetIndividual support (Rotary Direct)	Rotary Direct		
5 MIN	9:25 - 9:30	 What resources are available to clubs? District Foundation Chair & Committee members District website / Rotary.org District Seminars, training Club Speakers (inspirational stories) District leader attending a board meeting 	Discussion, sharing		
25 MIN	9:30 - 9:55	What Foundation funded projects has your club supported? What benefits has your club members experienced as a result? I locally Internationally Questions?	Discussion, sharing		
5 MIN		EVALUATIONS – Fill out your survey sheets in the center of the Program Book and keep them for Survey Monkey. An evaluation will be emailed to you within a week.			