



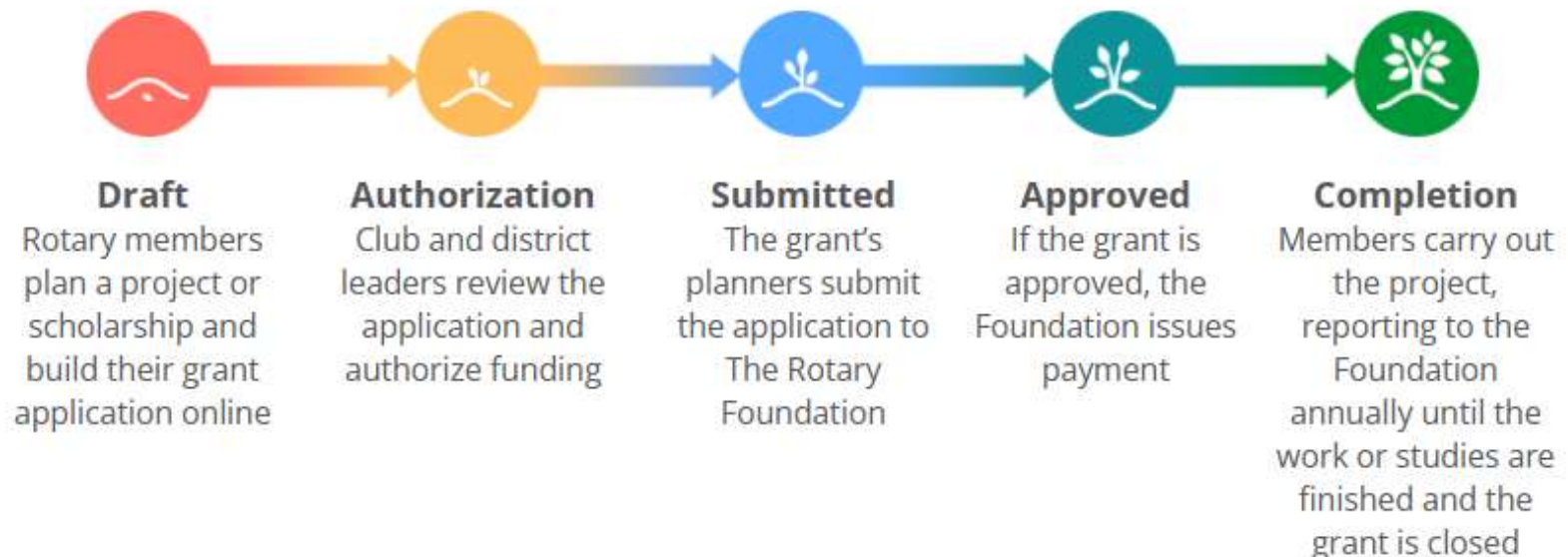
Agenda

- **District & Global Grants applications status & selection criteria (Bob)**
- **Donations to date and our goals (Roy)**
- **Ways we can increase both District Grant & Global grant engagement & donations. (Roy & All)**
 - **Website DG & GG projects list, contacts and kind of help needed.**
 - **MyRotary on-line donations.**
 - **Every Rotarian Every Year can become a Paul Harris award.**
 - **Benefactor/Bequest donations**
 - **Rotary Minute at meetings**
- **Your ideas on Grants/Donations (All who attend)**

The Rotary Foundation offers grants that support humanitarian projects, scholarships, and vocational training teams. Here's an overview:

- **Global grants** support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$30,000 to \$400,000.
- **District grants** fund smaller-scale, short-term projects that address immediate needs in your community or abroad.
- **Disaster response grants** support disaster relief and recovery efforts through grants from the Rotary Disaster Response Fund.
- **Programs of scale grants** support Rotary member-led, evidence-based, programs that have already demonstrated success.

The lifecycle of a Rotary grant



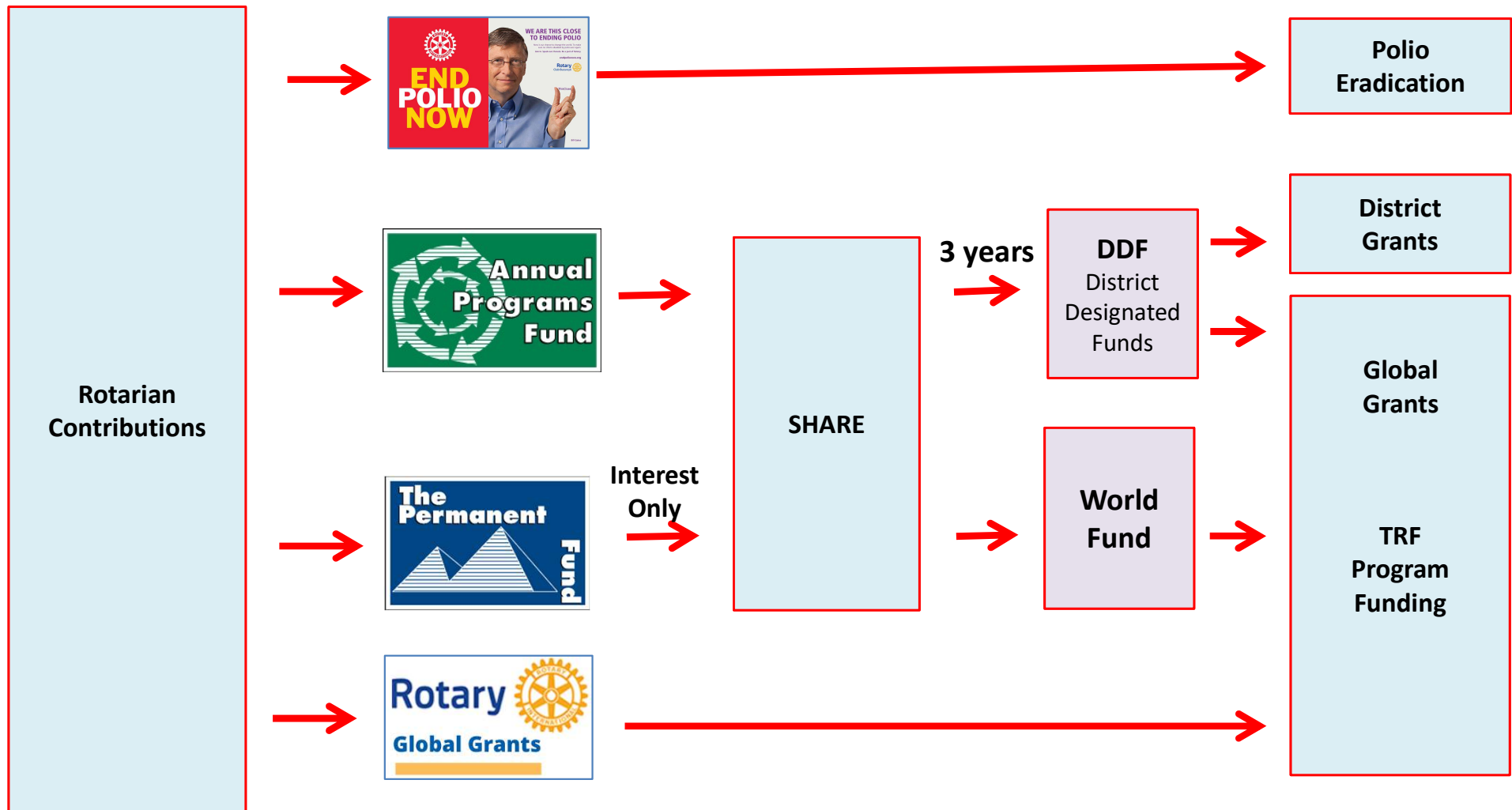
District Grants in D7910 Grants Subcommittee (GSC)

FOUNDATION ADVISORY BOARD

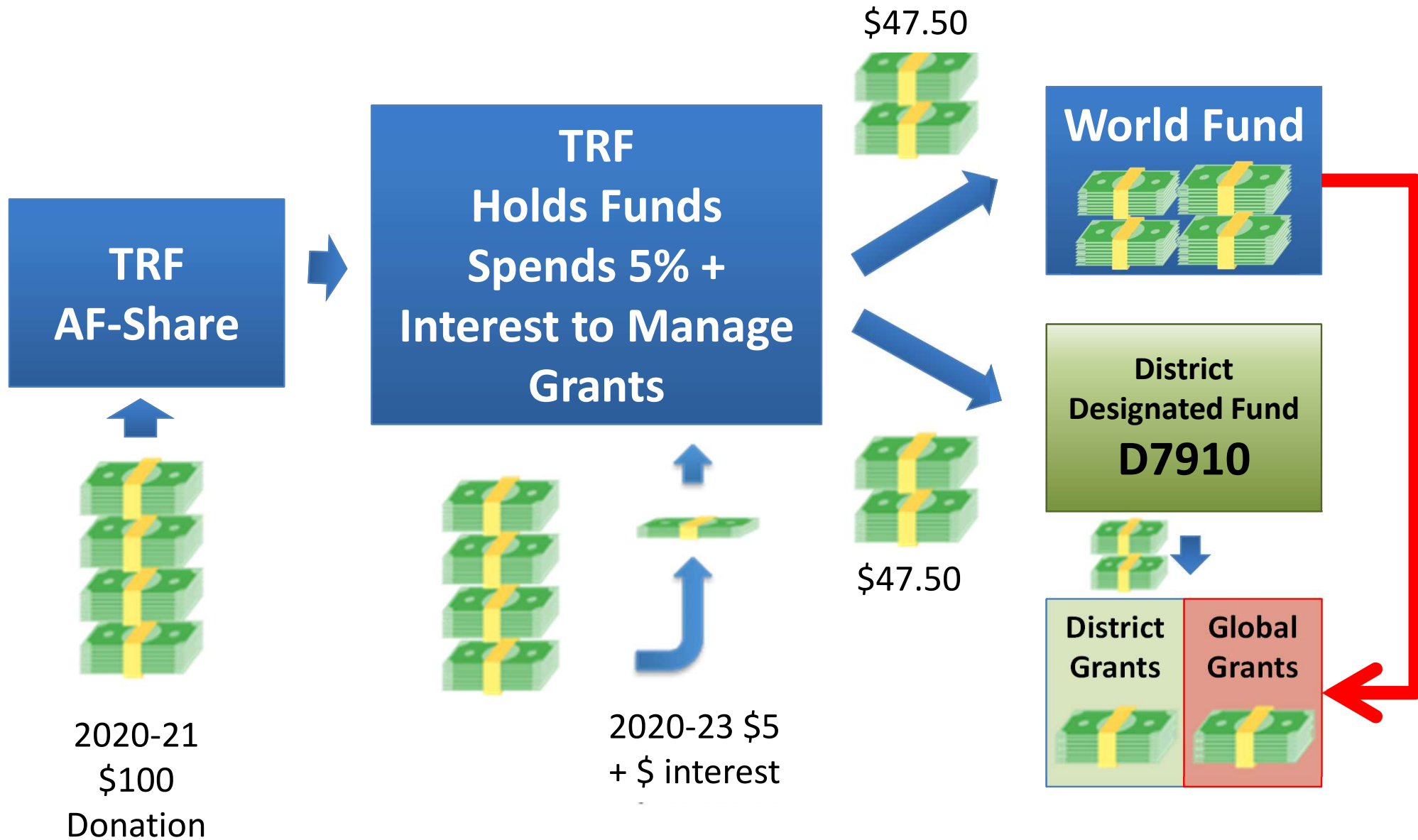
District Grants Subcommittee Chair (DGSC) Robert Worth, <i>RC of Framingham</i>		
Elliot Rittenberg , DG 2023-24	Joyce Graff DG(E) 2024-25	DG(N) 2025-26
Karen Fusco Area 1	Roy Balfour DRFC 2020-21	TBD DG (ND) 2025-26
Brian Donovan Area 2	TBD* Area 4	Tom Polito Area 6
Julie Parent Area 3	TBD* Area 5	TBD* Area 7
All team members are signed up for one year and renew on an individual basis		

* Seeking volunteers who will be Foundation Chairs from these areas

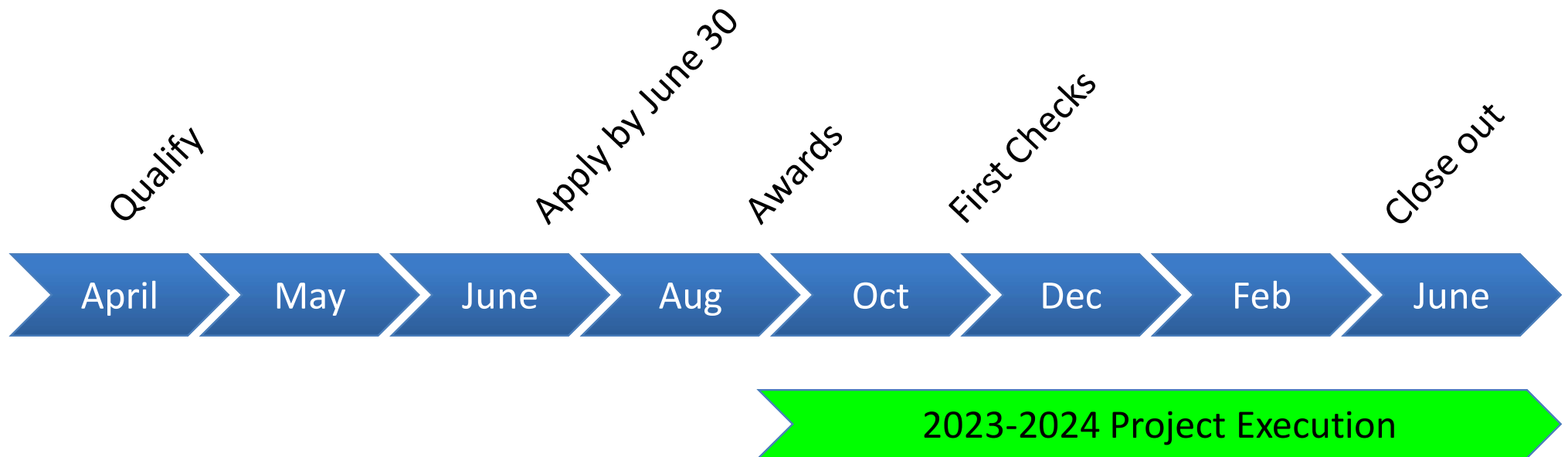
Rotary Foundation Funding Process



How Your AF-Share Donation Returns to D7910



Schedule For District Grants



- Do not start spending until your project is formally approved
- It is ok to lend money to the District Grant account while you wait for the DG check, and repay upon receipt of the DG check

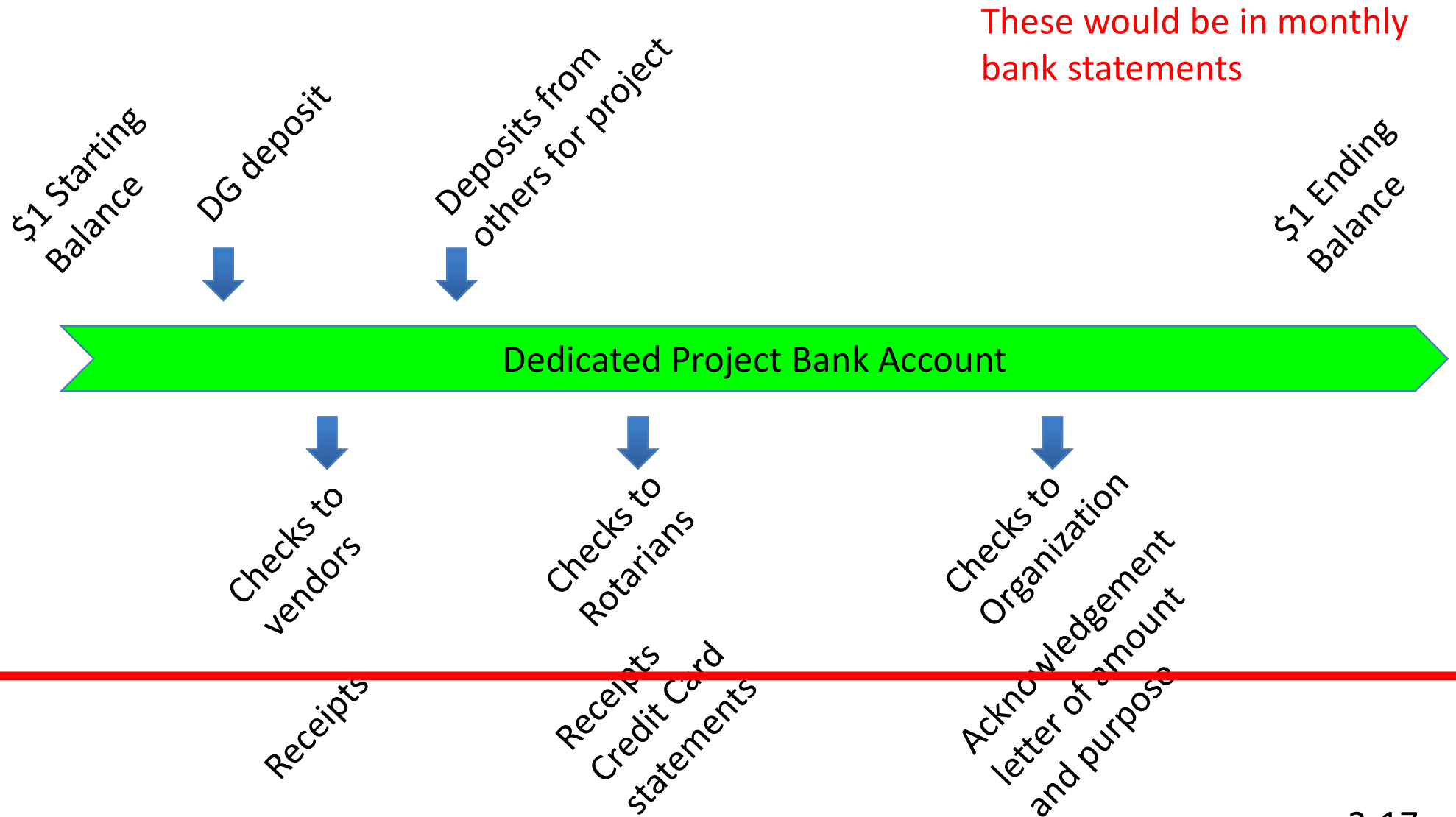
Application Content

Must-Provide Information

Tab/Section		Information that must be provided
DETAILS		Rotary Clubs in the District participating in the project
		Non-Rotary entities participating in the project
A P P L I C A T I O N	Impact	Number of beneficiaries
		Focus Area
	Co-Operating Organization	Cash Contribution of non-Rotary partners
		Volunteers and volunteer hours from non-Rotarian partner
	Implementation Plan	Number of Rotarians from sponsoring club participating
		Rotarian volunteer hours from sponsoring club
		Monetary contribution from other Rotary Clubs*
		Number of Rotarians and volunteer hours from other RCs*.

* Participation by Interact and Rotaract Clubs will be deemed as “Other Rotary Clubs”

District Grant Money Flows and Documentation



Scoring Rubric – An Example

1 to 5 scale, 11 measures

Maximum score: 53, Minimum Required Score: 20

1 to 5 scale, 11 measures							"Project Score " is computed when the values you determine for each measure is entered in the " Value for Project" column.	
Maximum score: 53, Minimum Required Score: 20								
Evaluation Criteria		Score for different Values					Value	Score
<u>Category</u>	<u>Measure</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>		
Impact	Beneficiaries	1 to 5	6 to 8	9 to 15	16 to 25	>25	100	5
	Environment					Y or n	y	5
Sponsor Club	Rotarians	1 to 3	4 to 8	9 to12	13 to 20	>20	20	4
	Volunteer Hours	1 to 5	6 to 10	11 to 20	21 to 30	>30	300	5
	Small Club?			y or n			n	0
Non-Rotarian Entity	Funding support	\$1 - 50	\$51-100	\$101-200	\$201-300	>\$300	200	3
	Volunteers	1 to 2	3 to 5	6 to 9	10 to 15	>15	10	4
	Volunteer Hours	1 to 2	3 to 4	5 to 6	7 to 10	>10	25	5
Other Rotary Clubs	Clubs			1			1	3
	Funding support	\$1-50	51-100	\$101-200	\$201-300	>\$300	250	4
	Volunteer Hours	1 to 2	3 to 5	6 to 9	10 to 15	>15	15	4
TOTAL SCORE						42		



AVAILABLE DDF BY DISTRICT

For District 7910 In Program Year 2023 - 2024

Transaction	Description	Amount	Balance
50% of Annual Fund Share contributions from 2020 - 2021		\$59,336.04	\$59,336.04
50% of Available Endowment Fund Share Earnings		Pending	\$59,336.04
Carry Forward from 2022 - 2023		Pending	\$59,336.04
Actual DDF Balance			\$59,336.04
Tagged	GG2350520 Submitted	(\$16,239.00)	
Total DDF Tagged		(\$16,239.00)	\$43,097.04
Uncommitted DDF Balance (Estimated)			\$43,097.04
Pending Allocations	GG2237250 Authorizations Required	(\$17,194.00)	
Pending Allocations	GG2351907 Authorizations Required	(\$17,250.00)	
Total DDF Pending		(\$34,444.00)	\$8,653.04
Unallocated DDF Balance (Estimated)			\$8,653.04

From: SHARE <share@rotary.org>
Sent: Monday, July 24, 2023 12:39 PM
To: Roy Balfour <rbalfour@columbiabenefits.com>
Subject: D7910 2024 DDF

Hi Roy,

My apologies for missing your call earlier this morning. I just left a voicemail, but in case we do not have the chance to chat before your meeting I wanted to give you some figures that might be helpful!

Here is the RY2023-2024 District Grant max budget- this amount is currently available in the grant center when you begin the application process: \$32,203.20

Additionally, attached is the SHARE contribution detail report for RY24 along with the Available DDF report for RY24. The available DDF report still has 2 figures listed as "pending". The carry forward amount will update when the end of year accounting is finalized and the SHARE endowment earnings typically follow.

Please feel free to give me a call before your meeting should you need further information.

Kind regards,
Sara

Sara Szwankowski
SHARE Specialist, Donor Services & Support
Tel +1.847.425.5629



Requests Awaiting Your Attention

Filter records:

Submitted	Project Name	Sponsoring Club	Estimated Budget	Grant Amount	
Under Review					
Jun 26, 2023	Camp Wiyaka Platform Renovation	Athol-Orange Area	\$5,000.00	\$1,500.00	Open
May 11, 2023	Foldscopes	Southborough	\$1,000.00	\$1,000.00	Open
Awaiting Further Information					
Jul 04, 2023	Suicide Prevention Stickers	Leominster	\$5,000.00	\$5,000.00	Open
Jun 29, 2023	Crocker Field Restoration Grant	Fitchburg	\$6,000.00	\$3,000.00	Open
Jun 28, 2023	Ukraine-Generator-Prosthetic-Clinic	Needham	\$4,500.00	\$1,500.00	Open
Jun 27, 2023	Conservation Projects	Weston -Wayland Rotary	\$4,500.00	\$2,250.00	Open
Jun 23, 2023	Alzheimer's Walk Team	Sturbridge	\$2,500.00	\$1,250.00	Open
Jun 22, 2023	Maple Dale Kiosks	Nashoba Valley	\$3,000.00	\$2,000.00	
Jun 21, 2023	Meals packaging in partnership with Meals of Hope	Westford	\$5,000.00	\$0.00	
Jun 21, 2023	Blackstone Valley Fights Hunger	Blackstone Valley	\$3,500.00	\$1,250.00	
Jun 18, 2023	Food Insecurity and Medically Tailored Food Pantry-Year 3	Westborough	\$310,000.00	\$5,000.00	
More Information Provided					
Jul 01, 2023	Empowering Young Mothers: Health Education and Community Organizing	Gardner	\$7,000.00	\$3,500.00	
Jun 30, 2023	Rising Students and Rise Against Hunger	Concord Rotary	\$6,000.00	\$2,000.00	Open
Jun 30, 2023	Family Community Nights at Boys & Girls Club	Montachusett Area	\$2,000.00	\$1,000.00	Open
Jun 30, 2023	Meals packaging in partnership with Meals of Hope	Westford	\$5,000.00	\$2,500.00	Open
Jun 28, 2023	Helping MassBay Community College Students continue their education.	Wellesley	\$10,000.00	\$5,000.00	Open
Jun 19, 2023	Finance, Build and Deliver Bunk Beds for Bedless Children	Littleton	\$15,000.00	\$7,500.00	Open
Jun 15, 2023	Nutrition 68	Northborough	\$7,100.00	\$3,000.00	Open
Jun 14, 2023	Hawks Read - Elementary School Literacy Program	Hudson	\$3,800.00	\$1,900.00	Open
Jun 07, 2023	Food Insecurity, Teenagers	Brookline Rotary	\$5,000.00	\$2,500.00	Open
Jun 05, 2023	Facing Mental Health Town wide in Bedford, Concord and Lowell	Bedford	\$6,000.00	\$2,000.00	Open
May 01, 2023	Heart of Rotary - Senior Lunch Event	Wachusett Area (W.B.H)	\$9,000.00	\$4,500.00	Open

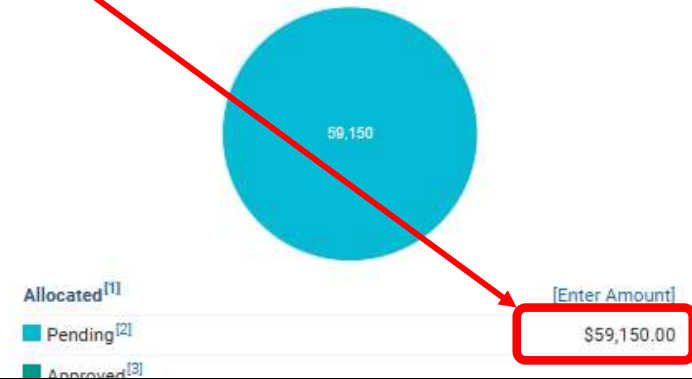
Status Summary

- 2 Under Review
- 9 Awaiting Further Information
- 11 More Information Provided

[List of all grants](#)

Budgeted Funds

[Details](#)



\$59,336.04 < TOTAL RI DDF (From 2020-21 Share Donations)

\$29,668.02 < 50% DDF for District Grants

\$2,535.18 < 50% of Last Years Endowment Earnings for District Grants

\$32,203.20 < TOTAL Available for District Grants as of 7-24-23

Confirmed by 7/24/23 RI Sara Email

\$59,150.00 < TOTAL D7910 District Grants Requested

54.4% Funds available Assuming all grant apps qualify

Received^[5]

\$0.00

Spent^[6]

\$0.00

Available^[7]

\$0.00

In These 7 Areas Of Focus



Basic
Education
& Literacy



Maternal &
Child
Health



Peace &
Conflict
Prevention/
Resolution



Disease
Prevention
&
Treatment



Water,
Sanitation
& Hygiene



Community &
Economic
Development



Support the
Environment



Promoting peace



Fighting disease



Providing clean water, sanitation,



Saving mothers and children



Supporting education



Growing local economies



Protecting the environment



Ending polio forever

Rotary has been working to eradicate polio for over 35 years, and our goal of ridding the earth of this disease is in sight. We started in 1979 with vaccinations for 6 million children in the Philippines. Today, Afghanistan and Pakistan are the only countries where polio remains endemic.

Help us in the final push.

D7910 Global Grant 7-Steps

1. **D7910 Global Grant App. & Community Assessment.**(Bob forms)
2. **Check District where project is taking place is GG Qualified.**
3. **Use D7910 Global Grant calculator.** Example:
\$30k Total Project Budget (GG Min.)
\$30k Rotary Funds:
 \$16,667 D7910 DDF Funds (\$12,000 Club to D7910 adds \$4,667)
 \$13,333 Rotary World Fund
4. **Send to D7910 Grant Committee for review & DDF allocation before starting RI online app. After District approves then...**
5. **Rotary Int'l Global Grant App use \$16,667 D7910 DDF club contributions**
6. **DO NOT hit GG submit button until club \$12,000 funds received by D7910 Escrow Account**
7. **After \$12,000 rec'd by D7910 then hit submit for RI Approval.**

Reason for this “Swap” process is to protect the Club and District contributions should RI not approve the grant or project local difficulties occur then funds can be easily refunded.

3-9

District Number: 7910

District Status:  Qualified

RESOURCES



Draft

Filter:

Grant Number ⇅	Grant Title ⇅	Date Created ⇅	Last Activity ⇅	
GG2348213	Vocational education for students between ages of 16 and 30	23/02/2023	20/07/2023	 Delete
GG2349266	Mangrove restoration in Guatemala	22/03/2023	20/07/2023	 Delete
GG2237932	Creating a More Beneficial Life for the Community of Cidra, PR	20/04/2022	04/05/2023	 Delete

Authorization Required

Filter:

Grant Number ⇅	Grant Title ⇅	Date Created ⇅	Last Activity ⇅	
GG2351907	Happy School Project- India	30/05/2023	24/07/2023	
GG2237250	Uganda Water Project	30/03/2022	20/07/2023	

Submitted

Filter:

Grant Number ⇅	Grant Title ⇅	Date Created ⇅	Submitted on ⇅	
GG2350520	Kira School Revitalization	26/04/2023	30/06/2023	

The Rotary Foundation

1. Value ... *why donate?*
2. Help for Global & Local Projects
3. Donation flow & Recognition

Ever Make a TRF Donation?

75% Don't Why?

Don't see personal value connection

25% Do Why?

**Involved in TRF supported project
and see personal value connection**

Supporting The Rotary Foundation



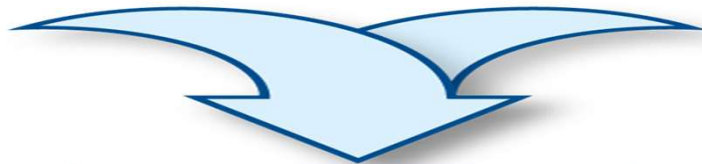
PolioPlus Fund
End Polio Now



Annual Fund
For Support Today



Permanent Fund
To Secure Tomorrow





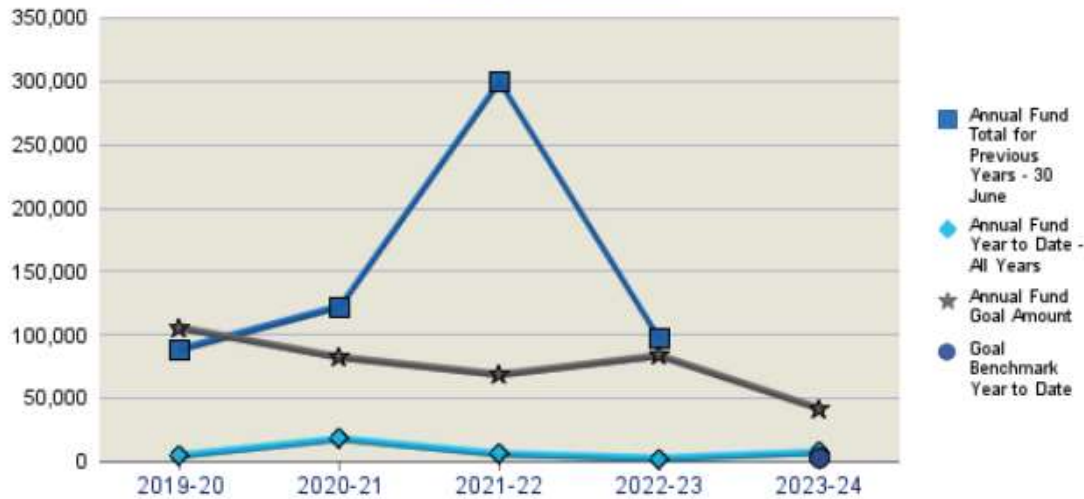
DISTRICT 7910 FUNDRAISING ANALYSIS

INTERIM RESULTS FOR JULY THROUGH JULY 2023-24

	Number of Members	Annual Fund						PolioPlus Fund					Other Funds**	Endowment Fund	Total Giving
		Goal	% Goals Received	Total	Per Capita	Goal Achieved	Non-Giving Clubs	Goal	% Goals Received	Total	Goal Achieved	Non-Giving Clubs	Total	Total	
2023-24	0	\$41,545	38.0%	\$6,979	\$0.00	16.8%	39	\$9,605	24.0%	\$320	3.3%	48	\$1,350	\$0	\$8,649
2022-23	1,157	\$83,135	48.0%	\$96,783	\$83.65	116.4%	9	\$19,810	28.0%	\$18,156	91.7%	26	\$5,045	\$100	\$120,084
2021-22	1,169	\$68,275	48.0%	\$299,628	\$256.31	438.9%	7	\$10,150	32.0%	\$29,748	293.1%	34	\$10,500	\$200	\$340,076
2020-21	1,232	\$81,900	58.3%	\$121,917	\$98.96	148.9%	7	\$10,800	35.4%	\$21,982	203.5%	27	\$5,650	\$1,444	\$150,993
2019-20	1,270	\$105,082	67.3%	\$88,336	\$69.56	84.1%	10	\$17,800	42.9%	\$50,867	285.8%	10	\$6,225	(\$10)	\$145,419

**Other Funds include term/directed gifts and funds for approved grants.

Annual Fund Measures



Year to Date (YTD) covers the period from July through July.

Recognition and Endowment Measures

	PHF	Bene-factor	Bequest Society*	Major Donor*	Major Gifts	EREY Eligible	Sustaining Member	PHS Eligible
All-time	3,857	192	77	70	--	--	--	--
2023-24	5	0	0	0	0	6	1	0
2022-23	77	4	4	6	0	379	287	25
2021-22	99	0	0	4	5	467	363	42
2020-21	119	0	0	2	0	456	414	36
2019-20	87	0	0	4	0	420	290	29

Yearly breakdowns include both new qualifiers and recognition level changes

Paul Harris Society Members:	20	Rotary Direct Participants:	23
Total Endowed Funds:	4	* Joint Major Donor/Bequest Society counts as one.	
Market Value:	\$870,257	EREY (USD 25 starting in 2016-17), Sustaining Member, and PHS Eligible includes all individuals, not just active club members.	
Market Value Date:	30-Jun-2023		
Foundation Recognition Points:	3,973.82		

Donation Recognition



✓ \$100 per year Sustaining Member (EREY)



✓ \$1,000 Paul Harris Fellow & Society



✓ \$10,000+ Major Donor



✓ \$250,000+ Arch C. Klumph Society

All gifts cumulatively count toward other Foundation recognition level

Would you ?

Donate \$ to a charity you already support with your time, if ...

- **Not out of your pocket?**
- **No effect your life style?**
- **No negative effect on your family?**
- **The effect would last forever?**

Permanent Fund



Testamentary Gifts

... Least effort and cost.

Simple Rotary form then add either

A: Insurance Co-beneficiary

B. Codicil to your Will or Living Trust

Naming additional Beneficiary as The Rotary Foundation.

That's all there is to it !

Major Impact:

90,750	Benefactors <u>\$1,000 or more</u>
<u>8,797</u>	Bequest Society <u>\$10,000 or more</u>
99,547	<u>8%</u> all Rotarians = <u>\$531 million</u>

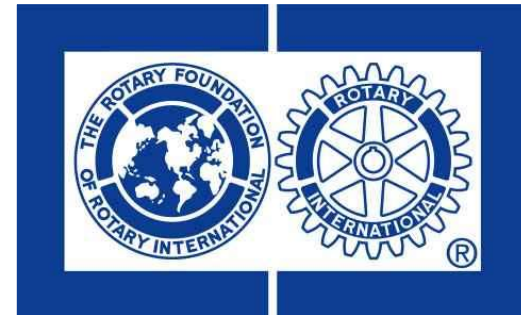


You have a choice !

Involuntary Philanthropy



Voluntary Philanthropy



No Plan ... not to worry the IRS has one for you!



Agenda

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 - **Benefactor/Bequest donations**
 - **Rotary Minute at meetings**
- **Your ideas on Grants/Donations (All who attend)**

Questions?

Thank You for support
of YOUR Rotary Foundation

