

# Club Rotary Foundation Committee Basics 2021-22





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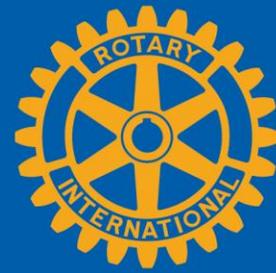
# CLUB ROTARY FOUNDATION COMMITTEE CHAIR JOB DESCRIPTION



Your chief responsibility as chair of your club's Rotary Foundation committee is to inspire your club's members to give to the Foundation and participate in its activities. Find more information about these duties in the accompanying documents.

RESPONSIBILITIES	
GENERAL	CLUB ROTARY FOUNDATION COMMITTEE
Attend your district training assembly.	Promote Foundation grants and activities and help members participate in them.
Work with the president-elect to select and prepare your committee members.	Inspire club members to give to The Rotary Foundation.
Create subcommittees as needed (e.g., global and district grants, fundraising, annual giving, PolioPlus, Rotary Peace Centers).	Attend the grant management seminar to ensure that your club qualifies for Rotary Foundation global grants.
Meet regularly and plan activities.	Oversee the global grants qualification process.
Set committee goals that will help achieve the club's annual goals, and monitor progress toward them.	Conduct inspirational, Foundation-focused club programs at least four times a year.
Manage your committee's budget.	Work with your treasurer to manage any Rotary grant funds your club receives.
Work with your club's other committees and your district committee on multiclub activities or initiatives.	Work with your district's international service chair and service projects committee to develop and fund projects.
Provide committee updates to your club, including the club president and its board of directors.	Work with your treasurer to submit donations to the Foundation in an accurate and timely manner.
Determine what your club expects of your committee.	Work with your club's membership committee to ensure a positive club image and experience.

# WORKING WITH YOUR COMMITTEE



You're the club Rotary Foundation committee chair. What do you do first? Meet with the outgoing chair, review your club's bylaws and strategic plan and, if necessary, start thinking about who else will be on your committee. If a Rotary Foundation committee already exists, meet with the outgoing chair, review your club's bylaws and strategic plan, and become an expert on The Rotary Foundation.

In many clubs, members serve on a committee for three years, so it's likely that some current committee members will continue into your term. If you need to fill any openings, work with the president-elect to find someone with experience in at least one of these areas:

- International projects
- Community service projects
- Fundraising

Collaborate with your club's other committees to maximize your club's impact. For example:

- Work with the service projects committee to determine if any current or future projects can be funded by Rotary grants
- Work with the public image committee to promote projects and fundraisers, and drive member participation
- Work with the membership committee to find alumni and involve them in club activities

You should also work with your [district's international service chair](#) to obtain resources, and advise on conducting community assessments and planning successful global grant projects.

As chair, you'll delegate tasks, so you'll need to determine how best to use the skills and interests of your committee members. You can prepare members by:

- Informing them of the committee's activities and goals
- Pairing new committee members with more experienced ones
- Encouraging them to communicate with their counterparts in other clubs
- Notifying them of district activities and meetings
- Sharing resources

Collaborate with your club's other committees to maximize your impact as a group. Club board meetings are great opportunities for these ongoing conversations.

## SETTING GOALS

In your role, you'll make sure your committee sets and achieves annual goals that support the club's strategic plan. You'll set goals with your incoming president and other club leaders at the district training assembly. The president or secretary can enter the goals in [Rotary Club Central](#).

## EFFECTIVE GOALS

Be sure your annual goals reflect committee capabilities and club interests. Goals should be shared, measurable, challenging, achievable, and time-specific (example: *All club members will contribute to the Annual Fund by 1 January*).

## ACTION PLAN

Work with your committee to develop an action plan, a series of smaller steps needed to achieve each annual goal. For every step:

- Determine who's responsible for implementing it.
- Set a due date.
- Decide how you'll measure progress and success.
- Consider the resources you already have, and get any that you need.
- Regularly assess your progress, and adjust your goals if necessary.

## MOTIVATION

Part of your role as chair is keeping your committee members motivated. Remember, they are volunteers. Common motivators include:

- Assurance that the committee's goals are attainable and will benefit the club and community
- Opportunities for fellowship and networking
- Assignments that use each member's expertise
- Efforts to make the committee's work enjoyable

## BUDGETING

Before 1 July, work with the outgoing committee chair and club treasurer to discuss the funds your committee will need and request that they be included in the club's budget. Be sure to consider any planned fundraising activities.

Oversee your committee's funds, transactions, and reports, and be aware of its budget status at all times. If you meet regularly with your club's treasurer, you'll be able to take action as soon as issues arise.

# DISTRICT SUPPORT



Members of the district Rotary Foundation committee can put your club in contact with other Rotary clubs working on similar projects. [The Rotary Foundation Reference Guide](#) explains how clubs can participate in Foundation programs. The [district international service chair](#) can help you conduct community assessments and plan and obtain resources for strong projects.

## VIBRANT CLUB WORKSHOP

Members can learn strategies to create strong, vibrant clubs, enhance their public image, and learn more about The Rotary Foundation. Club presidents, club Foundation, membership, public image committee members, and other interested members should attend.

## GRANT MANAGEMENT SEMINAR

At the grant management seminar, club members learn how to successfully manage a Rotary grant, meet the Foundation's stewardship expectations, and implement the club's [memorandum of understanding](#). For your club to be [eligible to receive a global grant](#), at least one member involved in running projects must attend a training seminar in the district. Talk to your president-elect to determine who from your club will attend. Refer to [A Guide to Global Grants](#) and log-in to the [Learning Center](#) and take the [Grant management seminar](#) courses for more information on the global grant process.

## CLUB MEETINGS

Ask to be included on the meeting agenda to recognize members who have contributed to the Foundation and to talk about how members can support it. Make sure to do this every quarter. Invite alumni and volunteers to speak about how the Foundation has been a benefit to them or how they have seen it benefit others.

Free [videos and images](#) can be downloaded from the Rotary website to demonstrate the Foundation's work. Rotary Foundation logos and promotional materials are available in the [Brand Center](#). These can also enhance your presentation.

# FUNDRAISING



One of the club Rotary Foundation committee's core responsibilities is telling club members stories about how The Rotary Foundation makes service projects possible. When members connect Rotary projects with Foundation funding, they are inspired to get involved and contribute. The [gift acceptance policy](#) provides an overview of the types of gifts The Rotary Foundation can accept.

Work with your club's committees on fundraising efforts for club projects. A successful fundraising event or campaign can support projects that make a tangible difference. If your club chooses to organize a fundraiser, take the following steps:

1. **Determine how much funding you need.** Set a target amount and identify the type of event that will realistically yield that amount.
2. **Establish a budget.** Find out what is available in your club budget for your event. Determine expenses and anticipated revenues.
3. **Identify the resources required to meet your fundraising goal.** Determine how many people are needed to plan and carry out the fundraiser.
4. **Plan the event.** Choose an appropriate date and venue for the event.
5. **Manage funds appropriately.** Establish a tracking procedure before collecting any money, and deposit funds collected in an account you open specifically for the event. Report to the club and donors how the funds are used.
6. **Organize volunteers.** Set up a committee to organize the fundraiser. Assign tasks to the volunteers and involve community members.
7. **Publicize your event.** Work with your club's public image committee to identify the target audiences in the club and the community, and plan how to reach them. Involve the media as appropriate. You can find a variety of promotional resources in the [Brand Center](#).
8. **Hold the fundraiser.** Encourage volunteers to monitor the event's progress. Note successes and challenges, and plan to discuss them during the evaluation phase.
9. **Recognize volunteers, contributors, and sponsors.** Follow up with personalized thank-you notes, photos, and, if appropriate, certificates.
10. **Evaluate the event.** Discuss the event's successes and challenges. Record insights so that they can be applied to future fundraising efforts.

**Ensure continuity.** Discuss any outstanding issues with the incoming treasurer and new members of the fundraising organizing committee. Find more event ideas and promotional resources in the Event Planning Guide in the [Brand Center](#), and use [Rotary Ideas](#) to help meet your fundraising goals.

# GRANT-FUNDED ACTIVITIES



The Rotary Foundation offers grants that support a wide variety of member-coordinated projects, scholarships, and training around the world. There are two grant types: district and global. Detailed information on Rotary grants can be found in [The Rotary Foundation Reference Guide](#).

Rotary grants will enhance the quality and impact of your club's projects. Better projects will make your club more attractive to new members. Involve members in projects as planners and volunteers. When they see the impact of a successful service project, they will be inspired to promote Rotary, the Foundation, and your club. Your district resources and the [Rotary Grants staff](#) can help you apply for grants and navigate the grant process.

Sign up for the [Giving & Grants newsletter](#) to get the latest information, tips, and resources for Rotary grants.

Grant activities are supported by gifts to the Foundation, which can be directed to the Annual Fund, the Endowment Fund, or the PolioPlus Fund.

- **Annual Fund:** The [Annual Fund](#) is the main funding source for Rotary grants and activities. The Every Rotarian, Every Year initiative encourages members to participate in a Foundation project and contribute to the Annual Fund every year.
- **Endowment Fund:** Contributions to the Endowment Fund ensure the long-term viability of the Foundation's grants and programs. A percentage of the total value of the fund is directed to Foundation grants and programs each year.
- **PolioPlus Fund:** Club members are encouraged to make contributions to the PolioPlus Fund, which helps to continue immunization efforts until the world is declared polio-free.

[A Guide to Global Grants](#) outlines the processes for applying for global grants and developing successful and sustainable service projects.

## STEWARDSHIP AND QUALIFICATION

The Rotary Foundation awards grants to projects that promote world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. Through the Foundation, Rotary members have supported thousands of projects to provide clean water, fight disease, promote peace, provide basic education, and grow local economies. The Rotary Foundation is also a leader in the fight to eradicate polio.

The qualification process helps ensure that your district or club understands the financial responsibilities of The Rotary Foundation grant and is committed to the ethical management of grant funds. Districts are responsible for qualifying their member clubs. After your district qualifies your club as eligible for funding, you may apply for a global grant. The Foundation has two requirements for club qualification:

- The club president-elect or a club-designated appointee must attend the district grant management seminar.
- The club president and president-elect must sign the [club memorandum of understanding](#) on behalf of their club.

Your district may have additional requirements.

# DISTRICT TRAINING ASSEMBLY DISCUSSION QUESTIONS



The district training assembly offers a great chance to exchange ideas with other incoming club leaders. These questions can help you prepare for your training.

What are the responsibilities of the club Rotary Foundation committee? What are your responsibilities as chair?

What club goals are assigned to your committee?

How can your committee encourage members to contribute to The Rotary Foundation every year and help them to do so?

How will you advocate for the Foundation and inspire members to give?

How will you promote the Foundation to members of your community?

What tasks will you delegate to committee members? How will you support them?

What plans do you have for fundraising activities?







