

## Fund Development Best Practices

Some clubs include a line-item billing for Foundation giving in their invoices for members' dues. For example, a club that bills members on a quarterly basis might include a line requesting a \$25 contribution to the Rotary Foundation. There must be some notation on the invoice that the donation to the Rotary Foundation is voluntary. The club Foundation chair or treasurer later writes a single check (cheque) to the Rotary Foundation and details members' individual contributions on the Multiple Donor Contribution Form (094).

Many clubs encourage their members to enroll in TRF-Direct (998-USA or 998-CDN), which allows for automatic payment by credit card, debit card or electronic withdrawal from a checking or savings account on a monthly, quarterly or annual basis. The donor can designate contributions to any combination of the Annual Programs Fund and/or PolioPlus Fund.

Some clubs leverage Paul Harris Recognition Points to encourage giving to the Annual Programs Fund and/or PolioPlus Fund. For example, a club may offer to match each dollar contributed with one recognition point. In this way, a member who donated \$500 in cash that was matched by 500 Paul Harris Fellow (PHF) Recognition Points could become a Paul Harris Fellow.

Some clubs have Paul Harris Fellow giving circles. One example is that each member agrees to donate \$100 per year to the Annual Programs Fund and/or PolioPlus Fund in a circle of ten members. Then, one of the ten members is selected by a random drawing to be the Paul Harris Fellow. This continues for a total of ten years until everyone in the circle becomes a Paul Harris Fellow. The individual donors assign PHF recognition to the winner of the drawing. However, the Rotarians providing the contributions are still recognized as the donors for tax purposes. This practice can be modified to reduce the time needed for everyone to become a Paul Harris Fellow.

Some clubs have a Foundation auction. Various amounts of cash are placed in an assortment of sealed envelopes offered for auction. During the auction, members bid on the envelopes, not knowing how much cash is contained in any one envelope. The successful bidder then donates the amount of his/her bid plus the amount in the envelope to the Rotary Foundation. This can be done for Annual Programs Fund and/or PolioPlus Fund development.

Some clubs place empty envelopes at the tables where Rotarians are seated during the club meeting. If the member does not get fined that day, s/he is welcome to place a few dollars that otherwise would have been spent on fines in the empty envelope and seal it. Then, s/he writes his or her name on the envelope. At the end of the meeting, the club treasurer or Foundation chair picks up all the envelopes and keeps track of each donor's contribution.

A Rotary Club that owns a bingo operation raises a considerable amount of money for its own foundation. The club is active in several international community service projects each year, and uses the club's foundation to provide the cash contribution for its matching grants. This level of involvement in World Community Service seems to inspire the club's members to be very generous in their giving to the Rotary Foundation. Additionally, the club leverages some of the cash it raises for its own foundation to match members' Foundation contributions. Per capita giving is several hundred dollars per year.

An enterprising Rotary club produced Rotary Coin Boxes approximately the size of a half- pint container for purchase by other clubs. These coin boxes promote Rotary and can be placed at community locations, such as stores or offices, or used exclusively by Rotarians to donate extra change. Boxes can be ordered by contacting Centralia Rotary Club Coin Box Project, P.O. Box 183, Centralia, WA 98531 USA.

One Rotary District collected recipes from member Rotarians and produced a cookbook for sale to Rotarians and the public. Proceeds from the sale were donated to the PolioPlus Fund.

A club with a large foundation of its own used the funds it had available to match donors' contributions to the PolioPlus Fund. Based on the \$2,000 per year goal for the Rotary \$200 million challenge, the club pledged \$6,000 from its own foundation, and the members matched that amount, resulting in total contributions of \$12,000 to the PolioPlus Fund this year.

Some club presidents have their Foundation chair or other designated member speak individually to members in a private setting during a pre-set appointment about leaving a legacy to the Rotary Foundation through a bequest to the Permanent Fund. This delegate should be expert in financial matters as there are many different ways that Rotarians can fund a bequest, including but not limited to, cash, cash value life insurance proceeds, securities, life income trusts, donor advised funds (USA), and other items of value.

Financial advisers often encounter high-net-worth clients who request advice on deserving organizations to which they might leave a bequest. Sometimes, these clients have no family members or prefer not to leave a large inheritance to family members. A Rotary club Foundation committee might prepare a presentation about the Rotary Foundation and schedule a convenient time to meet with financial advisers in their local communities.

Put the Benefactor cards on each table and have a Foundation moment during each meeting in November. When people understand how simple it is to become a Benefactor, they will do it.