

## DISTRIC 5220 FOUNDATION/MEMBERSHIP MEETING NOTES -- AUGUST 15, 2009

*Contents: Membership; Foundation; Polio Plus; Trivia Challenge; Interact*

### MEMBERSHIP NOTES:

To increase **membership**:

- ❖ Designate a meeting as “bring a prospective member as a guest” several times per year
- ❖ Focus a meeting on Foundation and invite guests
- ❖ Plan: each member bring in one member each year
- ❖ Remind members to invite others to join us
- ❖ Educate members about who/what Rotary is so they can answer the question e.g.: ***“Rotary is the premier humanitarian organization in the world. It’s a little over 100 years old and we have fun while ‘doing good’.”***
- ❖ Have fun and be inclusive

For **new member retention**:

- ❖ Hold a COG and current member social with discussions about business services so members can discuss “what they do” and promote business – [A networking happy hour?]
- ❖ Be clear about expectations and commitments before joining then follow up if meetings are missed; watch time involvement, costs, find out if they have **fun** at Rotary
- ❖ Most membership loss is during second year of membership; if a member gets involved within three years probably will stay – 35% of departing Rotarians have membership <3 years
- ❖ Many short term members use the excuse “busy” which could mean they do not find the club to be interesting or rewarding

**Membership generally:**

- ❖ Recruit, Retain, Public Awareness/Relations, Extension (creation of new clubs)
- ❖ Current recession: moderate dues, rely on fund raisers; volunteer financing; plenty of fellowship opportunities; interesting programs; dynamic and meaningful projects – yard work for shut-ins, read in a school...
- ❖ Have a specific goal: this year, next, 3 years, 5 years and out
- ❖ Look at newer generation, tech savvy individuals
- ❖ We are less a networking organization and more a humanitarian organization –
- ❖ Create a club worth joining and keeping; involve members
- ❖ Make Rotary an event!
- ❖ Accept volunteers and other business community members; not restricting membership to business managers/owners

### FOUNDATION NOTES:

Rotary Foundation is the largest scholarship grantor outside the US government

Our District is in Zone 26 consisting of 14 Districts and 4 States.

District is planning a speakers bureau to speak on Foundation topics such as the Permanent Fund (estate planning and gifting to the Foundation’s endowment fund)

Permanent Fund: Endowment was founded in 1982 – ***these funds are not part of the annual program funds and there is no Paul Harris credit for gifts to the Permanent Fund.*** Earnings of the permanent fund supported Foundation efforts at \$7.5 million

District 5220 Year Ending June 30 2009: \$267,000 given to the Annual Programs; \$153,000 to Restricted Giving and \$5,000 to Permanent Fund

In our district we have 20 clubs that are Star Clubs... i.e. their contributions to Foundation are at \$125 per member or more

We have 30 communities with Simplified Grants including but not limited to: a 3H Grant in Honduras (Manteca); water in Peru (Sonora Sunrise) and Seeds of Hope (Stockton - but which one of 3 in Stockton?)

Annual Program: Funds contributed to the annual program are used by Foundation. However, funds available to the District for grants, both local and international, are based on contributions three years earlier. Fifty percent of those funds go into the World Fund with the remaining 50% available to the District. Twenty percent of this is available for local projects.

District 5220 has noted that contributions are not necessarily equitable from year-to-year... could be for a couple of reasons. Due to uneven contribution years the District averages each club's contribution over 2.5 years. The District calculates the percentage of each club's contributions for that period "against" the District wide contributions for that period. This provides the amount available to the individual club's automatic grant (Phase I) for the year. This is a guaranteed amount as long as the guidelines are met.

***Note: not eligible for funding: construction or construction materials; transportation; salaries.***

All funding applications require a match. Applications for this "automatic" funding (Phase I) are due August 28, 2009 (by September first). Monies not used in this round will be pooled for competitive grants. **Watch the Friday Facts mid-September for news about application deadline.** Grants in this round may be used for the same purpose Phase I grants; failed grants may be resubmitted in this round.

The District is trying to get more clubs involved partly with the idea that donations to Rotary Foundation will increase. This effort is to help members feel involvement in Rotary Foundation and its efforts by giving control of grants to the clubs rather than the District. In the past District approved these grants, now they approve only second round grants (Phase II.)

As of the 15<sup>th</sup> of August, District had only 11 application for the Phase I "guaranteed" or automatic grants.

**REGARDING POLIO PLUS:**

Please note that contributions designated (restricted) to Polio Plus are not accountable for the Annual Program or the local grants noted above. There is no reference back to the District, no club credits are awarded. However, we need to match the Polio Plus commitment.

Of the \$200 million commitment to match the Gates Grant, we have a bit over \$90 million to date, worldwide. We need to produce the rest \$109+ million by June 2012.

District leadership states that we should involve the public in raising funds; Rotary should not be the only ones.

**REGARDING INTERACT:**

Fifteen Interact Clubs have donated \$8,000 to Polio Plus (and my notes don't remind me but I think that could be our District Interact Clubs)

The leadership conference is scheduled for November 4-11. There were 10 slots left as of the 15<sup>th</sup> of August. Contact Brad Howard.

**TRIVIA CHALLENGE:** District 5220 plans another Trivia Challenge. Challenge teams pay \$500 to enter.

Submitted by Marilyn Saunders. Questions? Call 742-5134 or email [mwsaunders@earthlink.net](mailto:mwsaunders@earthlink.net)