To me, membership, service, and The Rotary Foundation form the most basic relationship in Rotary. They all feed off one and other. Look at any one of these subjects and it will absolutely lead to the other two.

Today, I want to talk to you about this, the trifecta of Rotary.

But let me start with a story…….
(tell story, furnish copy to Konrad for translation)

Let's take a look at our membership numbers.

Growing Rotary's membership is Rotary International's highest internal organizational priority, while polio eradication remains Rotary's highest external program priority. When we grow Rotary, we grow our service and the impact of our projects; we grow the awareness and understanding of Rotary in our communities; and most importantly, we grow our membership so that we can achieve more.

Growing Rotary involves continues support of our existing Rotary and Rotaract clubs efforts to remain relevant and attractive to new members.

Rotary's new Action Plan supports growing Rotary in all four priorities.

The desire to increase membership often results in a focus on adding new members to clubs and overlooks the importance of delivering an engaging experience for current members.

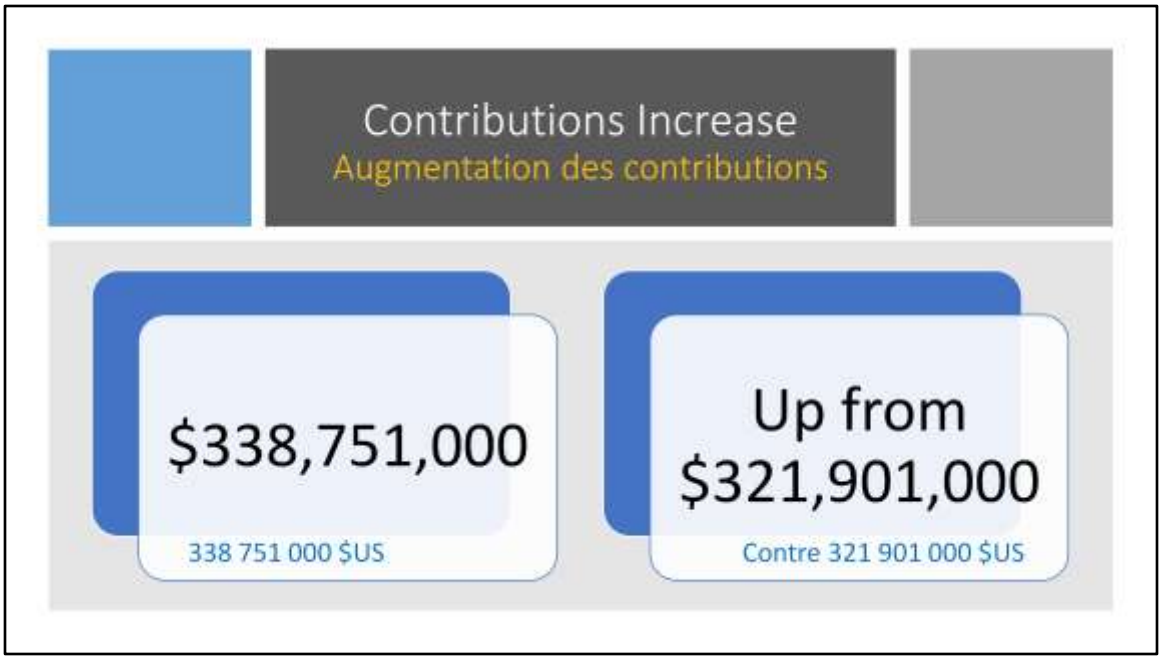
Last Rotary Year we welcomed nearly 145,000 new members into our clubs. Unfortunately, approximately 18,000 of these new members terminated their memberships within their first year. In addition, more than 142,000 existing Rotarians also left Rotary. Retaining our existing members remains both a challenge and an opportunity.

Clubs must actively work to take care of their members, connecting each individual with the elements of Rotary that are most important to them and provide the greatest engagement and value.

Now on to out last subject, The Rotary Foundation…..

It has been a very interesting year for The Rotary Foundation and, somewhat surprisingly, all the information I have to report is positive.

Your Foundation continues its amazing streak of being rated four stars by Charity Navigator for the 13th consecutive year. It continues to stand tall in the Top 1% of all charities.



Even during a pandemic Rotarians were able to maintain strong giving. At a time when it was needed most, you came through.

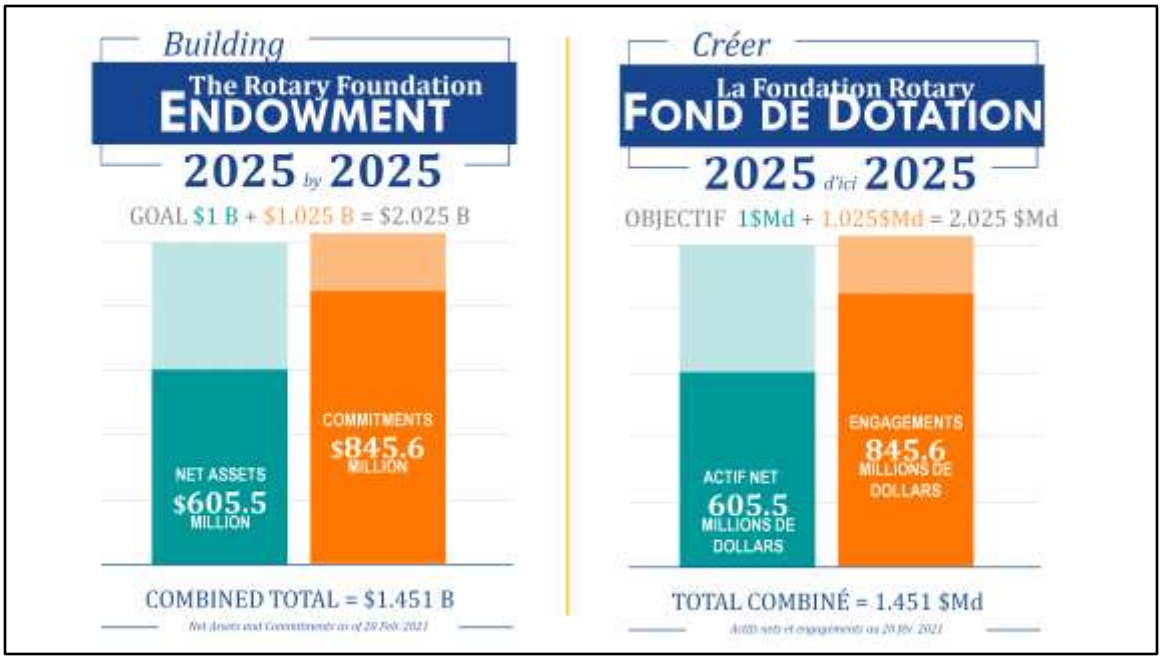
More money coming in meant more projects accomplished. This includes $8.4 Million directly in Covid relief through the Disaster Response Fund.

For the first time, Rotarians actually spent all the money in the World Fund. More and more international projects are being taken on by Rotary Clubs and Districts as we enlarge our footprint with humanitarian service.

Changes have been made to the Global Grant funding process to assure World Fund availability to all successful applicants. More on that later.

While there was a pause in vaccinations last year, it is interesting to note that the network of Rotarians in place to combat polio was utilized in the fight against Covid.

Once again, thanks to you, we met our goal and the Gates Foundation contributed another $100K.

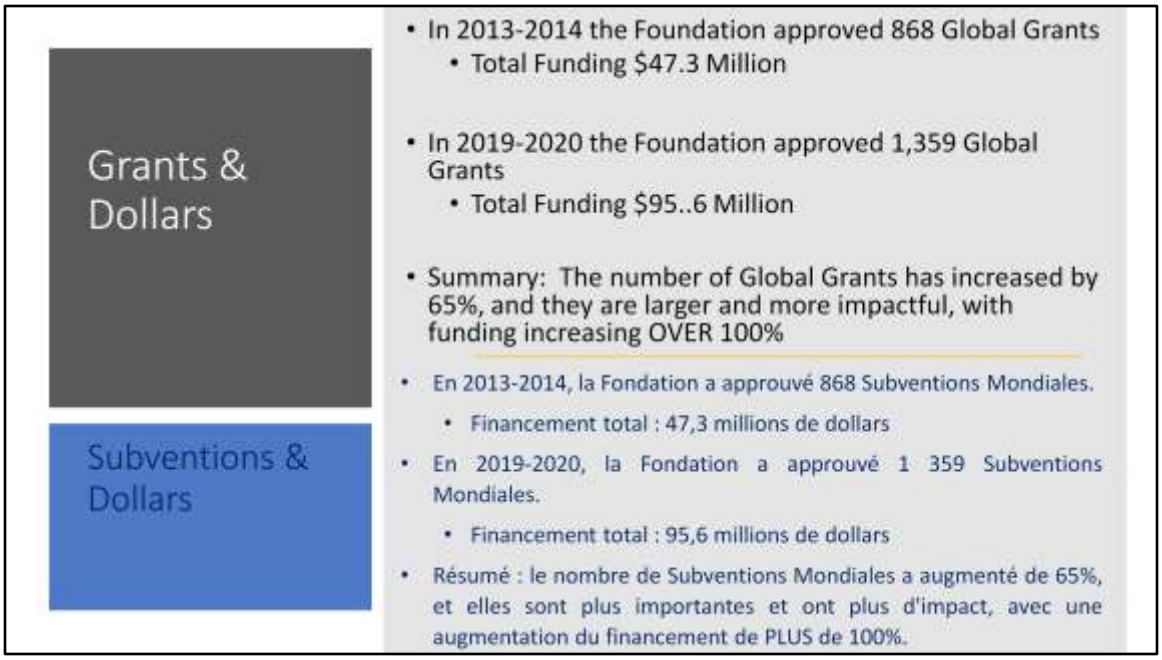


On the endowment side the news is equally impressive as we made great strides towards our goal of $2.025 Billion by 2025. Now standing at over $1.4 Billion our goal is definitely within our grasp.

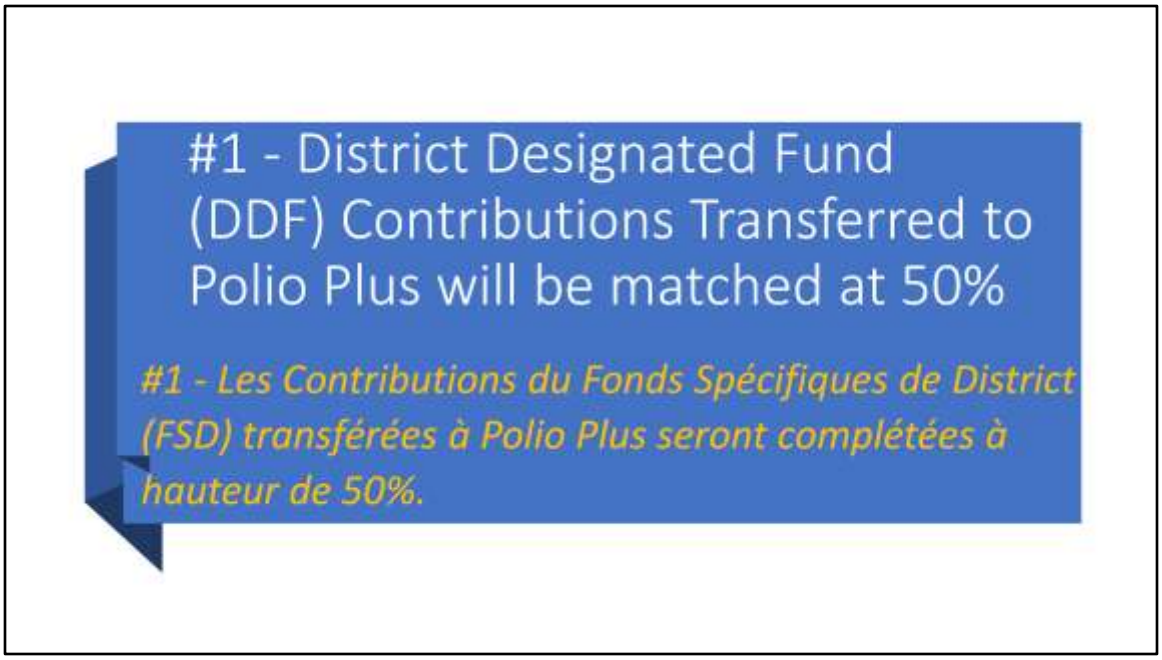
More and more Rotarians are looking to set up their Rotary Legacy through The Rotary Foundation. Helping them succeed, making sure their money is going to do what they want it to, is actually what I do as an E/MGA.

As mentioned earlier, this past year was the first time we exhausted the World Fund. In a way, this is a good thing because it means our gifts to the Annual Fund are all being put into play, not just sitting around in an account.

Let's look at the numbers……



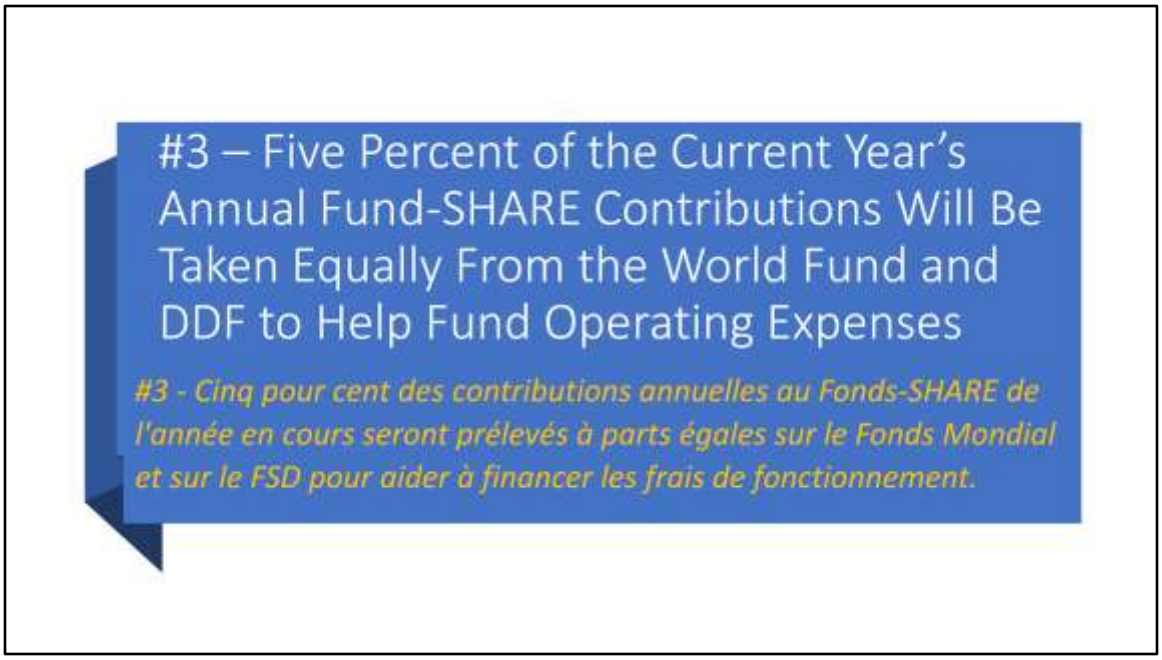
See “Grants and Dollars” additional page for verbiage for translation.



DDF Contributions transferred to Polio Plus will be matched at 50% instead of 100% by the World Fund before being matched by the Bill & Melinda Gates Foundation. The Gates Foundation will continue matching 2 to 1, every dollar that Rotary commits to polio eradication, up to $50 million per year for a $100K match.

It is vital that we continue to raise $50 million a year for polio eradication and raise awareness by keeping it a top priority for our clubs, our communities, and our government officials.

Instead of DDF applied to Global Grants receiving a 100% match from the World Fund, the Global Grants match will decrease to 80%. For the 2020-2021 Rotary Year, as long as funds remain available, DDF transfers will continue to be matched at 100% for Global Grant applications with “Submitted” status as of 31 May. If the World Fund is exhausted before 31 May, only those applications that are “Submitted” by the date the World Fund is exhausted will receive a 100% match on DDF.

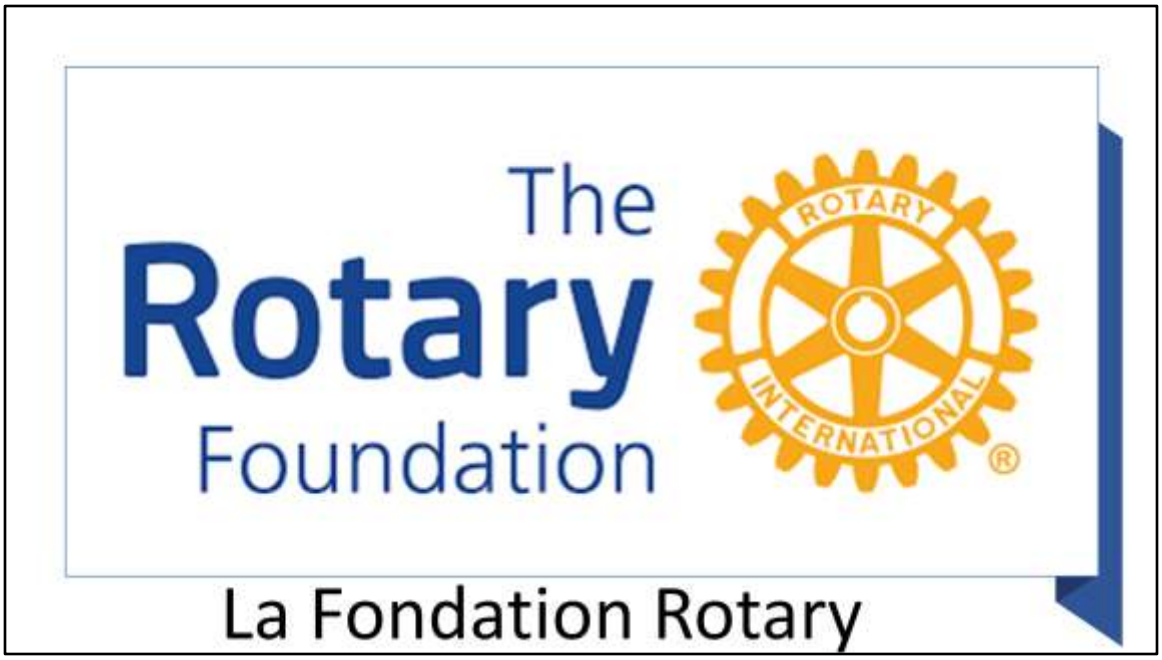


Currently, Annual Fund-SHARE contributions are split equally between the World Fund and DDF, with 5% of the total SHARE contributions being deducted only from the World Fund side to help pay for operating expenses. Beginning 1 July, all Annual Fund-SHARE contributions will first have the 5% directed to operating expenses and then the remaining will then be split equally between the World Fund and DDF. For example, a $100 contribution will generate $5 for operating expenses and the remaining $95 will divided equally, with $47.50 for DDF and $47.50 for the World Fund.

Annual Fund donors give with the expectation that their contributions will be used promptly to help communities. It is, by name, the Annual Fund. But the amount of rollover DDF each year remains high. On 1 July 2020 $48.8 million was carried into the current Rotary Year. Let's put these funds to use to increase the impact we make through our programs.

SO,

At the end of each Rotary Year, DDF that has been held for more than five years will be applied at the District's discretion, to Polio Plus, area of focus Endowment Funds, the general Endowment Fund (including the Rotary Peace Centers), the Disaster Response Fund, or the World Fund, which is the default fund. The first DDF rollover redirection will take place 1 July 2026, addressing DDF still unused from the 2020-2021 Rotary Year.



Your Trustees have spent a considerable period of time deliberating these issues, and these policy changes are the result of careful thought and planning. Balancing financial resources with program demands is challenging for any nonprofit, and adjustments and difficult decisions are sometimes necessary to cope with the changing situation.

Keeping our programs strong and growing relies heavily on the continued generosity of our members to the Annual Fund-SHARE. We are committed to careful stewardship and prudent investments that will provide more funding for grants and Foundation programs.

Well, that brings me to the end of my prepared remarks, I have checked all of President Holger's boxes and I still have two minutes left, so let me show you some slides of the project we talked about in the beginning.

I am still committed to doing

The neighborhood for our project

Doing a community needs assessment….

Great grandmother. Four generations of women living in this neighborhood. She has since passed.

One of the water supplies

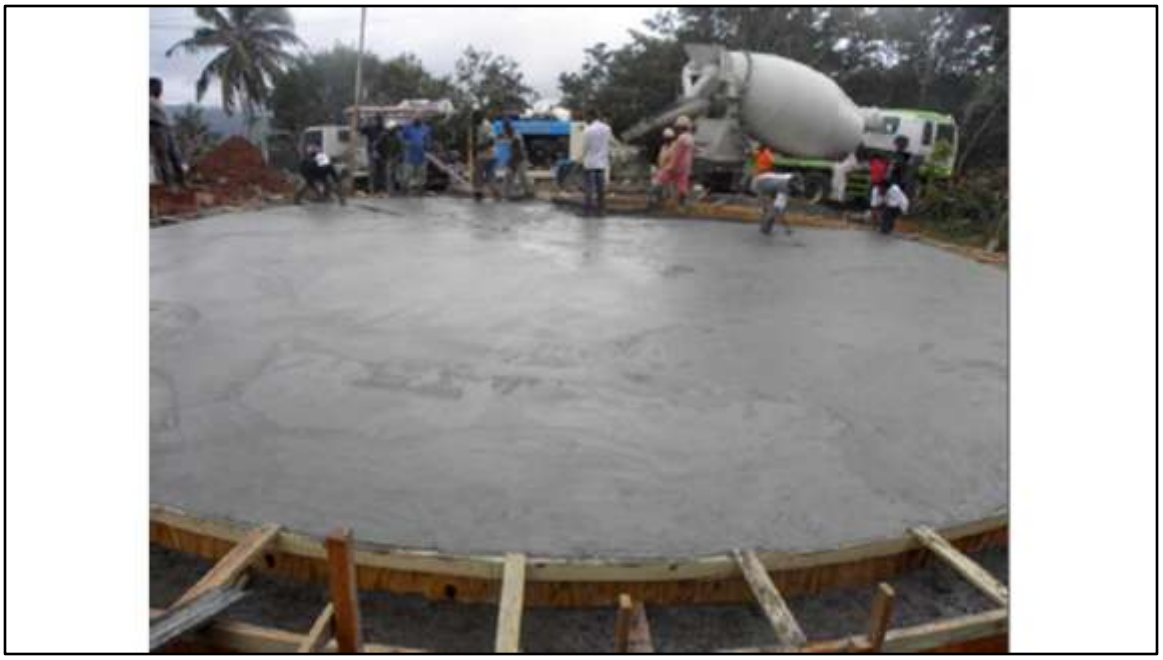
Future Clean Water Project Site
of Rotary Districts 6960 & 7030

“The Team”

The old, condemned tank…10K gallons….and water treatment facility

The gentleman on the left was cadre from The Rotary Foundation, on hand to make sure Rotarian's funds were being used properly. Good stewardship is a cornerstone of our Foundation!

Out with the old foundation



In with the new

550
JCB

Getting the tank materials up to elevation was something to see

SUPER Z900

My GSE Team was in time to see the project in process. That was the last year for Group Study Exchange.

Many Rotarians worked hard on this project

While the tank was being built, the infrastructure improvements were taking place

I like this picture. Reminds me of the movie “Rocky” when he successfully got to the top of the stairs.

12/05/2013 10:56

12/05/2013 09:28

180K gallons!!

It was a big project with funding from 5 districts and two clubs in a 6th district

Nice, clean, water.

My favorite picture. I make it a part of almost all my presentations. Even my TRF Zoom background.

Picture from 8 months after the project was completed. The gentleman second from left is Chuck Howey, who recently passed. Chuck gave me my first major gift, $20K, to jumpstart this project.

And now, back to our hosts…….