



2011 Regional Rotary Foundation Coordinators Institute Rotary Peace Centers • Major Gifts Initiative

Paul Netzel presentation (20 mins presentation) •

Sat., 19 FEB. 2011 • 3:00 – 3:20PM • (REHEARSAL: 10:30am Fri. 18 Feb)

Grand Ballroom #4 • Chicago Marriott O'Hare

Netzel Topic: "Fund-Raising for the Rotary Peace Centers"



SLIDE 1: Session Intro

Thank you Congratulations to each of you. What a high honor it is to have been invited to serve as a RRFC. Whether you are a 1st year RRFC or one who is returning You have an extraordinary opportunity to influence Rotary leaders around the world. You have the ability to influence the impact Rotary will have in the lives of people all around the world for years – because of the funds money that will be raised by TRF thanks to your leadership.



THE ROTARY FOUNDATION
of Rotary International
**2011 Regional Rotary
Foundation Coordinators' Institute**

Fund-Raising for the Rotary Centers

PRID Paul A. Netzel
Chair, RPC-MGI Committee, 2010-12
19 February 2011



SLIDE 2:

As an RRFC you have the POWER of ONE!

A poem written by James Foley begins with these words:

Drop a pebble into the water: you see a splash, and it is gone. But there are half-a-hundred ripples circling on and on and on, spreading from the center, flowing on out to the sea. Drop a pebble in the water: and those little waves may flow into a great big wave. There is no way of telling where the end is going to be.

Your impact as an RRFC will be much as that stone dropped in the water.



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**As an RRFC you have the
POWER of ONE !**





SLIDE 3:

Start **Video**: **POWER of ONE!** (67 seconds)



SLIDE 4:

AFTER VIDEO:

Just think when you combine YOUR Power of One TIMES the number of RRFCs in this room today what a Difference YOU will make in Helping TRF and Rotarians DO GOOD IN THE WORLD.

 **POWER of ONE =**
YOU have the Ability to

... INFLUENCE the *emphasis & strategies* of District Leadership
 – DGs, DGEs, DRFCs –
 for TRF Programs & Fund-Raising

As RRFC – you have the ability to INFLUENCE their Emphasis & Strategies of District Leadership – mainly DGs, DGEs & DRFCs – for TRF Programs and Fund-Raising.

SLIDE 5:

As RRRC one of your ROLES is to help PROMOTE – INFORM & SUPPORT TRF’s Programs & Fund-Raising. (CLICK)

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Key Role of RRFCs Includes Helping to

... Promote • Inform • Support TRF’s

Programs	Fund-Raising
Rotary Peace Centers	RPC Major Gifts Initiative (Permanent Fund)

One TRF PROGRAM – is the Rotary Peace Centers. In fact, I remind you it is TRF’s #1 Educational Priority. (CLICK)

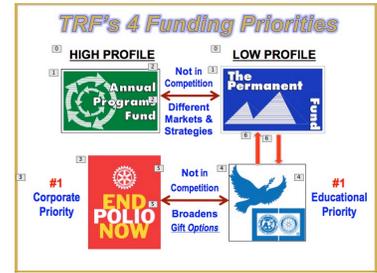
And, of course, Fund-Raising focus for the RPC program is mainly through the MAJOR GIFTS INITIATIVE. (CLICK)





SLIDE 6:

When it we talk about Fund-Raising we are focusing on 4-Main Funding Priorities of TRF.



Several are HIGH PROFILE and the others LOW PROFILE among most Rotarians around the world. (CLICK)

I believe you would agree our Annual Program Fund is High Profile while The Permanent Fund is “Low Profile.” (CLICK)

But what is important is that they are NOT in competition with one another because the focus on different markets and require different strategies for success. (CLICK)

Similarly, End Polio Now – Rotary’s #1 Corporate Priority – is High Profile while TRF’s #1 Educational Priority – The Rotary Peace Centers has generally been Low Profile – mainly to not get in the way of our efforts for Polio. (CLICK)

Here again we find that these two Priorities are NOT really in competition with one another because the represent largely DIFFERENT GIFT OPTIONS – plus the strategies used to raise the funds for both programs are quite different. (CLICK)

SLIDE 7:

We also find that a Gift to ONE Appeal often leads to a Gift to Others. THAT Assumes, of course, that we have STRATEGIES in Place that Leads to Someone Making an ASK FOR A GIFT.



Ultimately that is the #1 Goal of our efforts in Fund Raising is to see that Rotarians – and sometimes NON Rotarians are ASKED to CONSIDER MAKING A GIFT. (CLICK)





SLIDE 8:

Let's take a brief look at where the Major Gifts Initiative stands in relation to our Goal: As RIDE Allan mentioned, we have a GOAL to achieve US\$95 million by 30 June 2015.

To date we have Reported \$52,327,842 with another almost \$1.7 Million in additional gifts "IN PROCESS."

"IN-PROCESS" means that the donors have basically said this is WHAT I or WE are going to GIVE. But the Paperwork has not yet been completed. (CLICK)



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RPC • Major Gifts Initiative Goal

US\$95,000,000 by 30 June 2015

REPORTED TO DATE:
\$52,327,842
+ 1,687,000 "in process"
PROJECTED: \$54,014,842



SLIDE 9:

Since July 1, (2010) the MGI Committee has reported a little over US\$8.3 Million (including gifts "in process.") This is outstanding – and simply could not have happened without the support of a number of you in this room today. THANK YOU for what you have done – and for what you will be doing.



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RESULTS This Rotary Year

REPORTED since 1 July 2010:
\$6,649,982
+ 1,687,000
\$8,336,982



SLIDE 10:

Please take a look at the TYPES of GIFTS of US\$100,000 and above that have accounted for most of the US\$8.3 Million this year.

You will notice that 7 gifts are Bequests; 5 gifts are Life Income Agreements; 3 gifts are OUTRIGHT gifts; plus some Districts have already advised us of funds they will be giving through their DDF.

This slide helps underscore the importance of the kinds of Gifts we are looking for in the Major Gifts Initiative.



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Types of Gifts Made • YTD

\$1,500,000 – Bequest	\$ 300,000 – Bequest
800,000 – Outright (in process)	285,000 – DDF (all gifts)
700,000 – Bequest	275,000 – Bequest
675,000 – Bequest	152,000 – Outright (in process)
500,000 – Bequest	125,000 – Life Income
470,000 – Life Income	125,000 – Life Income
381,085 – Life Income	121,685 – Outright
350,000 – Bequest	100,374 – Life Income
	100,000 – Life Insurance





SLIDE 11:

On Monday morning one of your Topics will be “Major Gifts and the Permanent Fund.” These gifts are the Backbone to the success of our fund raising results to date – and will be the keys to our overall success when we achieve our \$95 million goal. (CLICK-a)



This graphic shows that if TRF were to stack all of the gifts it receives with the smallest on the bottom and the largest at the top – it would create what might look like a Pyramid. (CLICK-b)

If we look at how much money came from these gifts, we would discover an upside down Pyramid.

Successful fundraising for a Program such as our Major Gifts Initiative will require outright Major Gifts, of course. (CLICK-c)

But of all the gifts we will have received by the time we reach our \$95 Million goal we will discover that about 40% of the gifts will have come from Bequests and Life Income Agreements. (CLICK-d)

These gifts will actually account for 60-65% of the Total Dollars reported. (CLICK-e)

The reason this X is displaced is because in too many instances our Districts do NOT focus on seeking Bequests and Life Income Agreements. Because of this, we are “Leaving a Lot of Important Money and Gifts” on the table.

I realize that in certain parts of the Rotary world, you may not have planned giving vehicles as we know them in the USA or in other countries. However, every country has a legacy system, although they will differ by culture and tradition.

I believe you will discuss this and possible options during your breakout session on Monday. (CLICK)





SLIDE 12:

The question is often asked: “WHO are our Best Prospects for the Rotary Peace Centers MAJOR GIFTS INITIATIVE. (CLICK)

It starts with YOU ... and then with Your Team. There is an old saying in successful fund-raising: If you and those closest to the program aren't supporting the program, why should others be expected to do so?”

The question isn't HOW MUCH YOU GIVE, but it's the idea that you demonstrate your belief in the program – IF YOU believe you can do so.

Once you have made your decision ... then your next best prospects are [CLICK-A] Current TRF Major Donors; [CLICK-B]: Current Bequest Society members; [CLICK-C]: District + Club Leadership; [CLICK-D]: Multiple-Paul Harris Fellows and PH Society Members.

SLIDE 13:

You might wonder why there is so much focus on EXISTING DONORS to TRF. The reason is they are ALREADY INVESTED in TRF and are far more likely to give to another appeal IF PROPERLY cultivated and ASKED by the Right Person.



This graphic shows the Major Gift, Arch Klumph Society and Bequest Society gift Levels for recognition.

We suggest that A priority of yours should be to encourage District Leadership review Existing Donors and move them up the PYRAMID of GIVING. [CLICK]

The LARGER the SIZE GIFT being Requested to TRF for ANY program – the more likely the Donor will WANT to specific it's use &/or have a Named Gift Opportunity. This is where the Gift Naming Opportunities LIST for the RPC Program can come in handy.





SLIDE 14:

What are the Opportunities you have as RRFC to Promote – Inform & Support the RPC’s Program & the MGI Fund-Raising?

Here are a few of the most important opportunities you will have:

- **When you PLAN your Regional TRF Seminars**
- **While you are Assisting and Advising DGs & their DRFCs in planning for their District or Multi-District Seminars;**
- **When you are Training District Leadership**
- **When you conduct sessions at Institutes & GETS (assuming you are invited to do so)**
- **While you are supporting DGEs in their efforts to set District Goals for TRF. (CLICK)**



SLIDE 15:

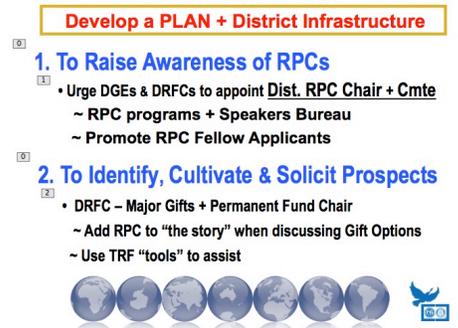
As RRFC a goal of yours might be encourage all Districts to INCLUDE in their TRF plan and infrastructure for the year the RPCs Program.

There would be 2 main areas of emphasis where they can help:

- 1. To Raise Awareness of RPCs**
- 2. To Identify & HELP Cultivate & Solicit prospects**

One of the most effective ways Districts which are successful in their support of the RPCs program is when they appoint a District RPC Chair & Committee.

One of the BEST WAYS to help Rotarians learn about the program AND to help RPCs Program is to PROMOTE APPLICANTS for Rotary Peace Fellows – target BOTH the 2-year Master Program and the 3 month Certificate Program.

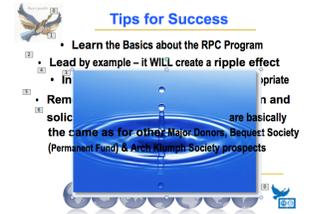
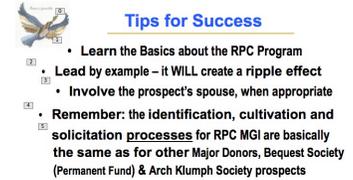




SLIDE 16:

Here are a few simple tips that have proven to lead to Success for the RPC program .

- Learn the Basics about the RPC Program (between Allan’s and my presentations ++)
big steps.
- Lead by Example – it WILL create a ripple effect [CLICK]
- Involve the Prospect’s spouse, when appropriate.
- Remember: ALL of these Processes are the SAME for all Major Gifts, Bequest Society & AKS asks.



SLIDE 17:

Tools & Ideas that lead to success include using

- RPC Video
- List of Named Gift Opportunities
- a new simplified RPC commitment form
- Use RP Fellows, Alumni & TRF Staff
- You as RRFCs might be excellent ... PLUS members of TRF Rotary Peace Centers and Major Gifts Initiative Committees.
- One special offer we have from a Million Donor to the RPCs Program – he is willing to travel anywhere in the world (at his own expense) to participate in a solicitation for a gift of US\$1 Milion or more – if schedules can be worked out.



Keep in Mind: You DO NOT need to be the one who “makes the ask” to be helpful.

- You can be the “door opener” to secure a visit with a prospect
- You can simply tell YOUR STORY as to why you support TRF and/or the RPC’s program
- You can be one who says THANK YOU after a gift is made.





SLIDE 18:

One of the MOST Productive Activities that we have found in the cultivation and solicitation of RPC Prospects – as well as Prospects for OTHER Rotary Programs – is what we call “small, hosted dinners” or they could be lunches. A meal function, however, is the most successful option compared to receptions and other informal meetings.

- **Ideally 8-12 qualified prospects should attend along with 3-4 District Rotary Fdn Committee members, the DG, or other appropriate Rotary leaders based on the prospects attending.**
- **The event typically runs 1-1/2 to 2 hours.**
- **The program includes a speaker, RPC video and an update on RPC MGI.**
- **A successful alternative to this is the “Million Dollar Dinner” some districts have been using.**

Once again, the same kind of activities you use for other TRF Appeals will work just fine for the RPCs. All you need to do is make a point to INCLUDE the RPCs as part of the Foundation Story you are telling.



Tools that Lead to Success

The single most productive activity leading to RPC•MGI success has been a series of “small, hosted dinners” involving 12-18 prospects and Rotary

RESOURCES Utilized in Successful Cultivation & Solicitations:

- RPC Video
- Named Gift Opportunities + simplified RPC commitment form
- RPC + MGI Committee Members + for \$1-million asks ...
- TRF Trustees, RI Directors: past, present and incoming
- TRF Staff



SLIDE 19:

How can Members of the RPC•MGI Committee be of HELP to YOU and YOUR TEAM?



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How Can Members of the RPC•MGI Committee be of Help To YOU and Your Team?



SLIDE 20: END •

Thank You.

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THANK YOU

