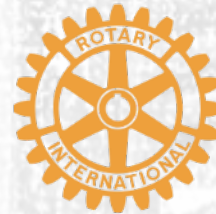


OUR FOUNDATIONS

The
Rotary
Foundation



Rotary



Winnetka-
Northfield
Rotary
Charitable
Foundation

Our Foundations

The Rotary Foundation \neq Our club's foundation

- These are separate, distinct entities. Separate from each other. Separate but affiliated with Rotary International and The Rotary Club of Winnetka-Northfield.



Winnetka-
Northfield
Rotary
Charitable
Foundation

Our Foundations

Rotary International
501(c)(4)
Community Social Welfare
Organization

The Rotary Foundation
(TRF)
501(c)(3)
Charitable Foundation

Rotary Club of Winnetka-
Northfield
501(c)(4)
Community Social Welfare
Organization

The Winnetka-Northfield Rotary
Charitable Foundation (WNRCF)
501(c)(3)
Charitable Foundation

The Winnetka-Northfield Rotary Charitable Foundation



Mission

To fund the charitable service
work of the Rotary Club of
Winnetka-Northfield



The Winnetka-Northfield Rotary Charitable Foundation

Trustees

- Patti Van Cleave & Bob Baker- Co-Presidents
- Debra Campbell- Secretary
- Rich Lalley- Treasuer
- David Birkenstein
- Moha Boucha
- David Grant
- Tony Kambich
- Marie Kuipers
- Fred Schwimmer
- Liz Taylor
- Barb Tubekis



Winnetka-
Northfield
Rotary
Charitable
Foundation

The Winnetka-Northfield Rotary Charitable Foundation

Projects

- Community Grants
- Operation Warm
- Thanksgiving groceries
- Community Service Projects
- Bike Racks for Park Districts
- School supplies for Peru
- Kids Against Hunger
- Donations to various charities and causes- TRF, ShelterBox, Disaster Relief efforts
- Global Grants we sponsor or support (Morocco Project)

The Winnetka-Northfield Rotary Charitable Foundation

How We Raise Money

- Dig n Grin/Happy Bucks/ Birthday Donations
- Year End Appeal
- Project Appeals
 - ✓ Online donation page
 - ✓ Appeals in newsletter, at lunch, emails
 - ✓ Fundraising Events with Sponsors and Auctions (Operation Warm, past dinners supporting Community Grants project)
- Donations from Member DAFs, RMDs, Estates

The Winnetka-Northfield Rotary Charitable Foundation

2023-24 Financials

	Income	Expenses	Balance Sheet	
Community Service Projects	4,210	4,210	Assets	
Operation Warm Benefit and Donations	47,001	47,001	Cash	80,932
Centennial Dinner	3,280	3,280		
TRF	1,530	1,530	Liabilities	
Shelter Box	100	100	Restricted Donations	
Uganda Project	500	200	Community Grants Fund	38,926
Morocco Earthquake	7,363	7,663	Global Grants Fund	22,725
Community Grants	41,848	40,527	Kids Against Hunger	5,387
Interest	57		RYLA Scholarships	1,379
Puru School Supplies		491	Puru School Supplies	871
Business Expenses		829	Shelter Box	100
	105,889	105,831		69,388
			Total Equity	11,544

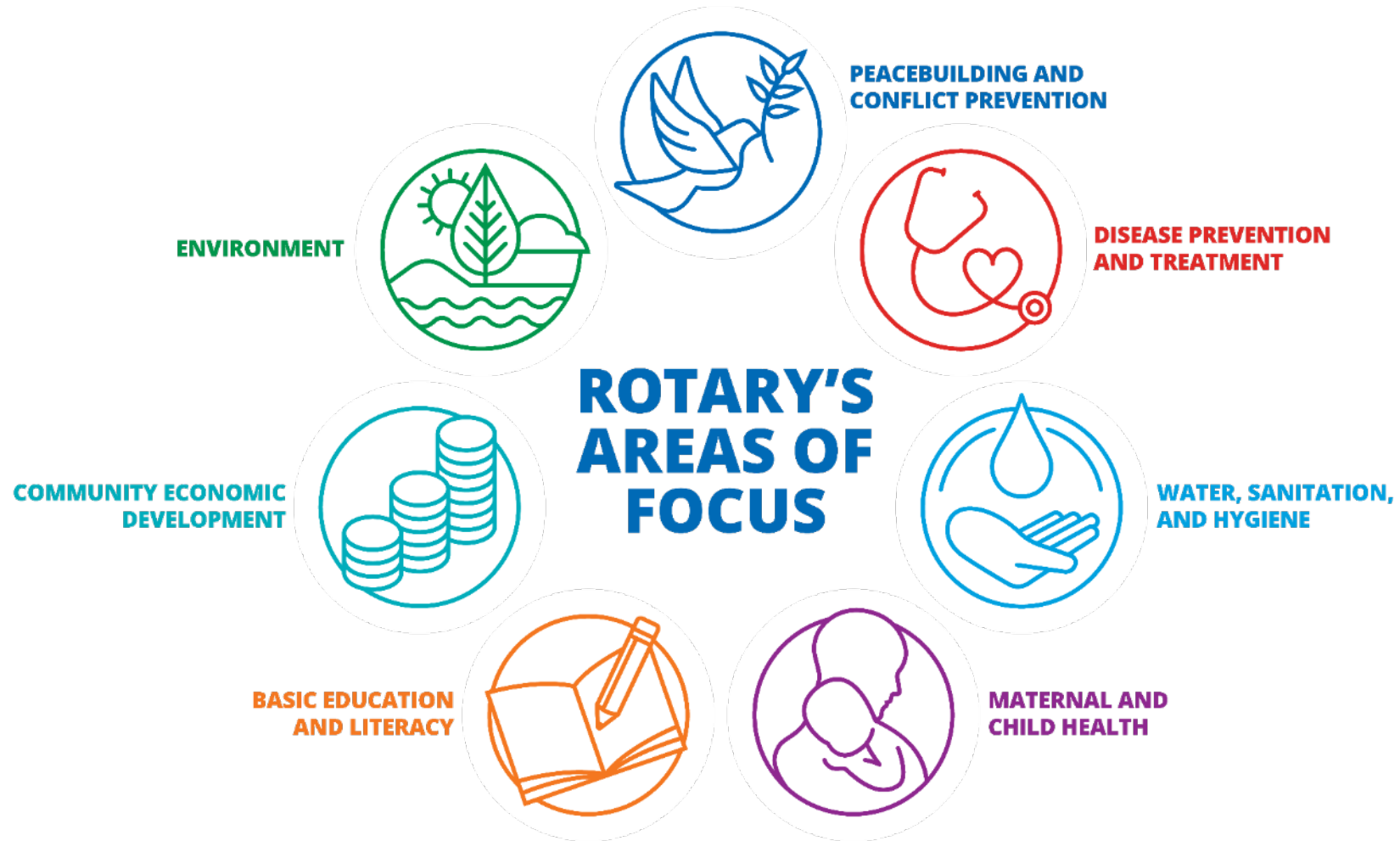
The Rotary Foundation

Mission

To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.



TRF's Areas of Focus



The Rotary Foundation's Programs

District Grants

- Club money gets matched with DDF
- Match amount varies by district

Global Grants

- Club money matched with DDF, DDF matched 80% by The World Fund
- Must have partner club in a different country

Global Scholars and Peace Fellows

- Global Scholars are funded by DDF from your district
- Peace Fellows don't cost your club or district anything but time!



The Rotary Foundation's Programs



Disaster Relief Grants

- Quick response to disasters, such as flooding, earthquakes, wars
- Funded through the Rotary Disaster Response Fund

Programs of Scale Grants


- One awarded per year
- Support member-led, evidenced-based programs that have already demonstrated success


Vocational Training Teams


- Group of professionals that travel to another country to learn or to teach
- Align with Rotary's Areas of Focus


The Rotary Foundation's Funds


< **Featured Causes** Areas of Focus Global Grants Named Funds >


Annual Fund-SHARE
[Learn more](#)


Endowment-SHARE
[Learn more](#)



PolioPlus Fund
[Learn more](#)



Disaster Response Fund
[Learn more](#)



World Fund
[Learn more](#)


< [Featured Causes](#) **Areas of Focus** [Global Grants](#) [Named](#) >


You can direct your gift to an area of focus within the Annual Fund. However, Annual Fund gifts that are designated to an area of focus do not generate District Designated Funds (DDF).



The Environment
[Learn more](#)



Peacebuilding and Conflict Prevention
[Learn more](#)


Disease Prevention and Treatment
[Learn more](#)


Water, Sanitation, and Hygiene
[Learn more](#)



Maternal and Child Health
[Learn more](#)



Basic Education and Literacy
[Learn more](#)



Community Economic Development
[Learn more](#)

< [Areas of Focus](#) [Global Grants](#) [Named Funds](#) **Endowment** >

Rotary strives to increase the value of your gift to the Endowment by preserving and investing your initial contribution and spending only a portion of the earnings.


Endowment-SHARE
[Learn more](#)


Endowment-Rotary Peace Centers
[Learn more](#)


Endowment-World Fund
[Learn more](#)

The Annual Fund SHARE process



Donation to Annual Fund **SHARE**

Donation is invested for 3 years; growth supports Foundation operations.



SPENDING DECISIONS SHARED

World Fund
(Trustee discretion)



GLOBAL GRANTS AND PROGRAMS*

District Designated Funds (DDF)
(District discretion)



DISTRICT GRANTS GLOBAL GRANTS

*Includes PolioPlus, Rotary Peace Centers, other districts, and the Endowment Fund (areas of focus)

DDF

Funds raised

2020-21

2021-22

2022-23

Funds spent

2023-24

Unspent funds roll forward

2024-25

World Fund

Match

Global grants

District grants

The Rotary Foundation Today

- Assets 6/30/24: \$1,444 Million
 - Target: \$2,025 Million in assets and pledges by 2025
- 2023-24 fundraising: \$352 Million
- 7% of Rotarians worldwide give more than \$1,000 annually, representing 45% of donations to the Foundation

THE ROTARY FOUNDATION'S EXPENDITURES GO TO ...



A+

from the American Institute of Philanthropy



from Charity Navigator

Full accreditation

from the Wise Giving Alliance of the Better Business Bureau

How can I support The Rotary Foundation?

- Through a donation through WNRCF (see Rich)
- Online at <https://www.rotary.org/en/donate>
- Via Rotary Direct – monthly, quarterly, or annually
- Via a personal campaign – Facebook or Raise for Rotary
- Through Legacy Giving – wills, trusts, life insurance, IRAs, endowments.

How are donations recognized?

- **INDIVIDUALS:**

- For each \$1,000 (or equivalent) donated, you reach a new **Paul Harris Fellow** level (up to +8)
- When your donations total at least \$10,000, you become a **Major Donor**



- **CLUB:**

- **100% Foundation Giving** – 100% of members gave at least \$25 to any fund, average > \$100
- **Every Rotarian, Every Year** – 100% of members gave at least \$25 to the Annual Fund, average >\$100
- **100% Paul Harris Club**



How do I make a lasting commitment?

- Through the **Paul Harris Society** – a pledge of \$1000 annually
- As a **Benefactor** or a member of the **Bequest Society**
 - Benefactors either make an outright gift of \$1,000 or more to the Endowment, or provide for that amount in their estate plan or makes an outright gift of \$1,000 or more to the Endowment
 - Bequest Society members make commitments in their estate plans for \$10,000 or more to the Endowment. Thereafter, your gift will result in an annual contribution to District 6440's DDF! Creating a lasting legacy for good through Rotary!
- By joining D6440's **Polio Plus Society** pledging \$100 annually to Polio+ fund



Rotary Club of Winnetka-Northfield

TRF Giving Metrics

Chartered 1924
 31 Active Members
 Giving Since 1985 - \$616K

- All Time Giving by Active Members - \$226K

Club Giving	Total	Annual	
		Fund	Polio
2023-24	\$29,584	\$17,034	\$2,550
2022-23	\$31,095	\$30,695	\$ 400
2021-22	\$11,778	\$7,928	\$3,850



**Paul Harris
Fellows**
23



**Paul Harris
Society**
4



**Major
Donors**
6



**Bequest
Society**
1



**PolioPlus
Society**
3



**Rotary
Direct**
2

TRF Goal for 2024-25

- 100% Every Rotarian Every Year
 - At least \$25 from each member donated to the Annual Fund/Share
 - Currently 7. Need donations from 24 more members.
- More Paul Harris Fellows
 - The club will make honor you with your first PHF award after you make a \$250 donation to TRF. Any fund qualifies.
 - Currently 23. Need 9 more to be 100% PHF Club.

“Why Should I?”

Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.



**THANK YOU
For Making
the World Better!**

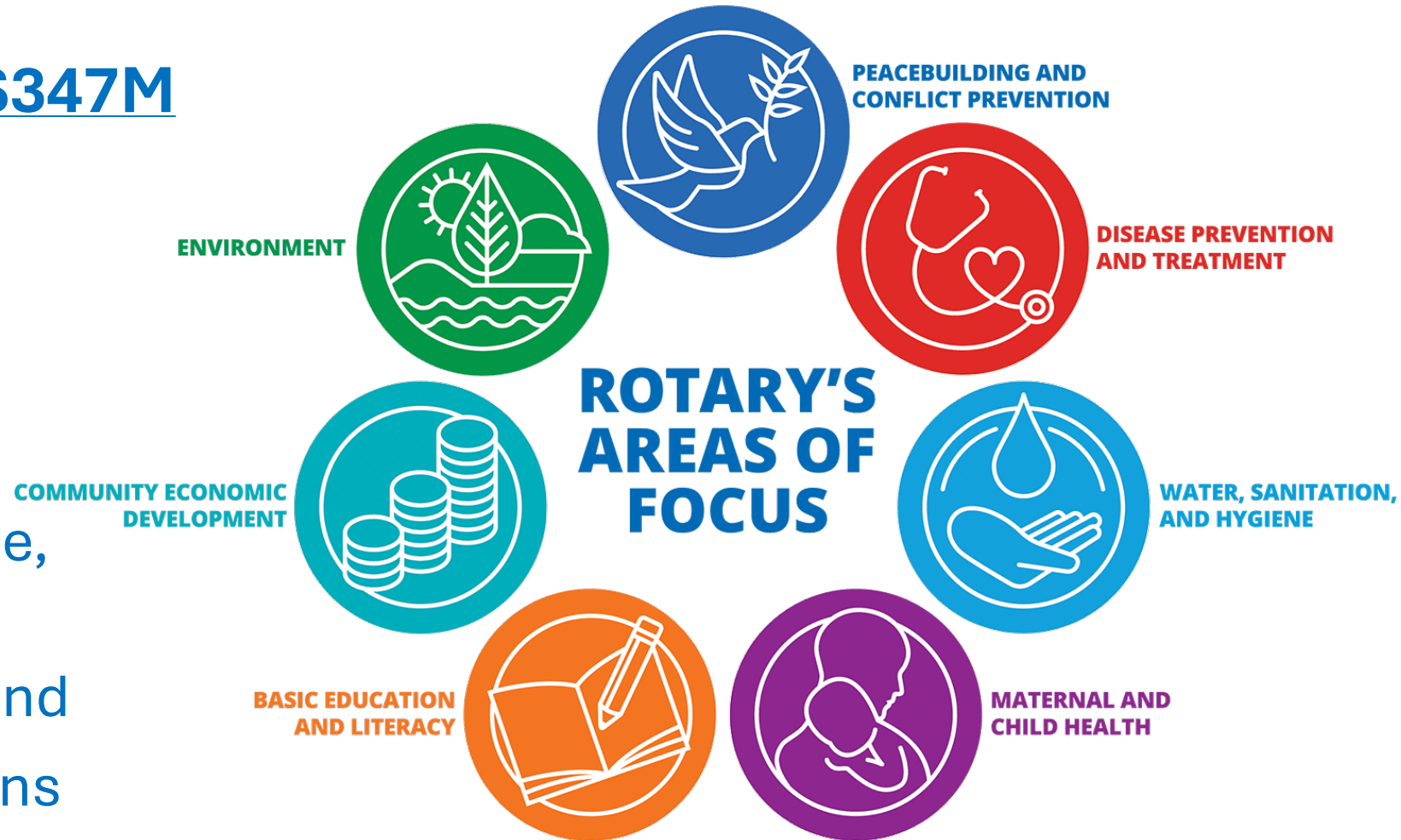
Appendix



The Rotary Foundation's Expenditures

2023-24 expenditures: \$347M

- \$146M Polio Plus
- \$ 72M Global Grants
- \$ 29M District Grants
- \$ 4M Peace Centers
- \$ 17M Disaster Response, Partnership Grants, Other
- \$ 10M Donor Advised Fund
- \$ 24M Program Operations
- \$ 44M Fund Development, Admin



Member Giving Status

	PHF	EREY		PHF	EREY
Ambrose, Michael			Lalley, Jr., Richard	Y	Y
Applegate, Thomas			Leske, William	Y	
Baker, Robert	Y		Mardirossian, Robert	Y	Y
Baumann, Wesley	Y	Y	Meisner, Ned	Y	
Birkenstein, David	Y	Y	Norton, Charles G.	Y	
Bittar, Vicki			O'Malley, Felicia		
Bouacha, Moha	Y		Padgitt, D. Lee	Y	
Campbell, Debra	Y	Y	Presser, ArLynn	Y	
Cook, Adriana Laura			Reed, Keith		
Dason, Teresa Ann			Schwimmer, Fred	Y	
Drummet, Kenneth	Y	Y	Sibert, Heidi	Y	
Evans, Tom	Y		Skalinder, Amy		
Farragher, Johnjoe			Skalski, Peter	Y	
Grant, David	Y		Taylor, Elizabeth	Y	
Kambich, Anthony L.	Y		Tubekis, Barbara Martin	Y	Y
Kuipers, Marie	Y		Van Cleave, Patti	Y	