



*...we inevitably come to the conclusion that a group of people get together and exist as an institution...so they are able to accomplish something collectively which they could not accomplish separately. They are able to do something worthwhile - they make a contribution to society (a phrase which sounds trite but is fundamental)*

Dave Packard, 1960



## Rotary Club of Fort Collins Time, Talent and Treasure

May 13, 2015

*..we accomplish something collectively, we could not accomplish separately.*



## Why I'm a Rotarian

**Rotary = Fellowship + Service**

*"We are 1.2 million neighbors, friends, and community leaders who come together to create positive, **lasting** change in our communities and around the world."*



Matching Grants  
Book Library, Samoa  
\$2,000 => \$50,000



## RCFC Strategic Initiatives

- ***Be Representative of our local community***
- ***Be Relevant to the Communities We Serve***
- ***Enjoy Fellowship, Serving to Create the Next Generation of Leaders***

4 Way Test	Ross Lane
Birthdays	Judy Boggs
Bylaws and Constitution	John David Sullivan
Christmas Bell Ringing	Bill Schafter
Club History and Archives	Bonnie Titley
Community Grants	Dennis Kaan
CSU Cadet of the month	Warren Wilson
Fellowship and Fun	Judy Boggs
Fundraising	Susie Ewing
Grocery Cards	Sally Lee
Highway Cleanup	Troy Tafoya
Inspiration/Pledge of Allegiance	Larry Kunter
International Projects and Grants	Susan Stewart
Legacy Fund Trustees	Jud Harper
Member Care and Retention	Jeanne Fangman
Member Engagement and First Year	Pam Harrington
Member Recruitment	Laurie Klith
Merit Badge University	Randy Kurtz
Music	Sally Lee
Peach Festival	Chuck Rutenberg
Photography	Kelly Kesler
Programs	Will Reynolds
Rotaract	Del Benson
Rotary Foundation	Mike Sollenberger



**“Time and Talent”:  
The Rotary  
Job Fair:  
35 Opportunities**

**Please find at least 2 committees where your Time and Talent will make a difference:**

**Turn in to PEN Glenn Schmidt**



## “Investing our Treasure”

### 2015-2016 Budget Planning

1. “Zero-Based” Budgeting Exercise:  
**Tremendous response! Thank you!**
2. More of RCFC operational costs will be tax deductible for you!
3. Today’s Ask – Our Charitable Programs need your support.



## 1. ‘Zero-Based Budgeting’ Exercise

1. *How much does your committee really need (\$) to make RCFC “Relevant to our communities served”?*
2. *What, specifically, will you do with that money, if fully funded?*
3. *How will the Time, Talent and Treasure invested engage more Rotarians, and help us be more Relevant?*



## RCFC Charities: Zero-Based Budget Response:

<u>Committee:</u>	<u>2014-15 Actual</u>	<u>2015-16 Request</u>
Community Grants	\$15,000	\$30,000
Scholarships	\$16,000	\$21,000
International Projects	\$17,000	\$15,000
RYLA/YRYLA	\$3,500	\$5,400
<b>Total Charities Budget</b>		<b>\$71,400</b>
<b>Total Incremental Requests</b>		<b>\$19,900</b>



## Panel:

- |                          |                   |
|--------------------------|-------------------|
| • Legacy Fund            | Jud Harper        |
| • International Projects | Susan Stewart     |
| • The Rotary Foundation  | Mike Sollenberger |
| • Scholarships           | Bob Meroney       |
| • Community Grants       | Dennis Kaan       |



## 2. 2015-16 Operational Costs:

Rotary Club of Fort Collins Charities Inc. - 501.C.3

***Now operational !***

Proposed 2015-16 Budget:

- Dues reduced from \$81 / quarter to \$69 / quarter
- Meals reduced from \$169 / quarter to \$151 / quarter
- Total Operational Expenses reduced  
from \$250 / quarter to \$220 / quarter

***Additional \$30 per quarter for tax deductible charitable donations !***

Final budget will be set based Rotarian feedback, and the Ask results.



## 3. RCFC Fund Raising Strategy Task Force Members

- |                     |                                      |
|---------------------|--------------------------------------|
| • Phyllis Abt       | Past President                       |
| • Judy Boggs        | Past President                       |
| • Susie Ewing       | Past President & Chair, Fund Raising |
| • Jud Harper        | Chair, Legacy Fund                   |
| • Dennis Kaan       | Chair, Community Grants              |
| • Martin Limbird    | Past Chair TRF                       |
| • Mike Sollenberger | Chair TRF                            |
| • Glenn Schmidt     | PEN                                  |
| • Stacy Plemmons    | PE, and Chair                        |



## Task Force Key Questions

- What are RCFC's Charitable Programs - Uses?
- What are our Sources of charitable support?
- Why do we do "fund raising"?
- What should be our goals for charitable programs?



## 2013-14 Charitable Sources and Uses

### Sources of Funds

The Rotary Foundation (Annual Fund only)	\$ 46,463	38.3%
Membership "Ask" Commitment	\$ 36,143	29.8%
District Grants Income (International) *	\$ 15,910	13.1%
Fund Raising (Peach Fest, New West, etc.)	\$ 22,793	30.5%
<b>Total, Less TRF</b>	<b>\$74,846</b>	<b>100%</b>

### Uses of Funds

Global Grants (international) *	\$ 33,546	44.8%
Scholarships **	\$ 18,000	24.0%
Community Grants	\$ 13,075	17.4%
Rural Urban Scholarships	\$ 3,000	4.0%
Rotary Read	\$ 3,000	4.0%
STEM	\$ 2,825	3.8%
Disaster Relief	\$ 1,500	2.0%
<b>Total</b>	<b>\$74,946</b>	<b>100%</b>

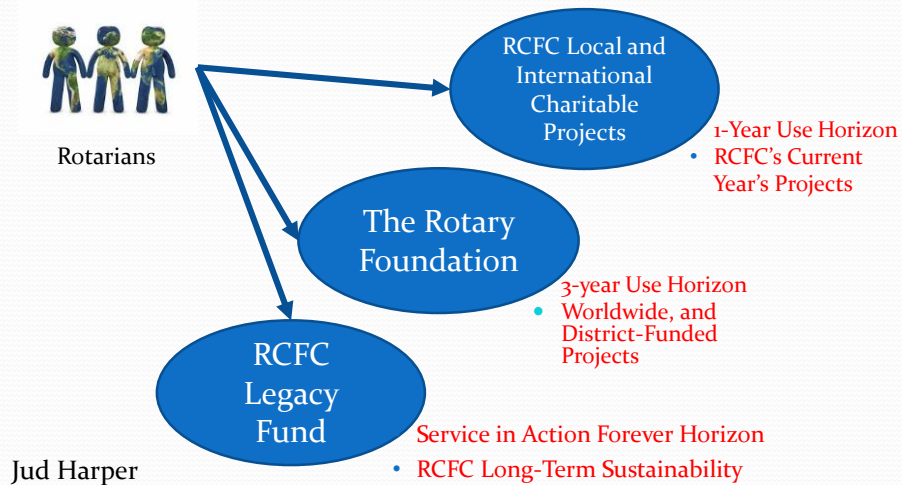
\* Includes \$15,910 from District

\*\* Includes Rotary and Family Scholarships

## Rotarians are Generous!

- Jud Harper
- Chair, Legacy Fund

## Charitable Giving: Current year, TRF, and the new RCFC Legacy Fund







## RCFC Legacy Fund

- Will provide supplemental support to the Club's charitable activities
- A \$1 Million Legacy Fund could provide \$50,000-70,000 per year for RCFC charitable projects
- The Club's BOD may request disbursements annually and the Committee of Trustees will act upon the request

**Service in Action, Forever**



Susan Stewart

Chair, International Projects  
and Grants



## International Projects

- **Purpose:** *Implement international projects that improve lives by focusing on Rotary's 6 areas of service:*

Susan Scratchley Stewart



## ...relevant to International Communities

- IP&G Committee made up of 15+ active members.
- IP&G Committee has implemented \$2.2 Million of projects since 1991 (using \$320,000 of club funds)
- IP&G Committee has **SEVEN** members experienced in Rotary Grant writing (most clubs have one or none).

• From:



TO:





Mike Sollenberger  
Chair, The Rotary Foundation  
Committee



## TRF – The Rotary Foundation



**The Rotary Foundation transforms your gifts into projects that change lives both close to home and around the world.** As the charitable arm of Rotary, we tap into a global network of Rotarians who invest their time, money, and expertise into our priorities, such as eradicating polio and promoting peace. Foundation grants empower Rotarians to approach challenges such as poverty, illiteracy, and malnutrition with sustainable solutions that leave a lasting impact.

Mike Sollenberger



# TRF – The Rotary Foundation

**Rotarians are Generous - Thank You!**

## RCFC Statistics

• Active RCFC Donors	146
• Paul Harris Fellows (\$1000 total)	107
• Paul Harris Society	15
• Benefactors	17
• Bequest Society	15
• Major Donors	13
• Non-Rotarian Donors	7
• Total Donations, all funds – last 4 years	\$512,570
Annual Fund only – last 3 years	\$98,057
(AF available for International/District Matching Grants)	



Bob Meroney,  
Co-Chair, Scholarships  
Committee



## Rotary Scholarships

### May 6, 2015

Program: Thanks Bob Meroney and  
the RCFC Scholarships Committee!

Video: Thanks Erin Hull and the  
Fort Collins Coloradoan!!

Bob Meroney



# Dennis Kaan

## Chair, Community Grants



## RCFC Community Grants

**Uses:** Four Quarterly Grant Awards to 501(c)(3)s

- Arts & Sciences
- Youth Programs
- Education Programs
- Health & Welfare





## ...relevant to Our Local Community

- Impacts our community quality of life
- Makes the RCFC relevant to our community
- Strengthens RCFC - Community bonds



**YOUR CONTRIBUTIONS HELP OUR COMMUNITY!**




## Commitment Requested - Treasure

Two Suggested Levels of Commitment

- **Sustaining Member – Sustaining Level for Local Charitable, TRF and Legacy**
  - If every RCFC member commits at this level, all Committee requests will be funded.
- **Visionary Member – Visionary Level or greater for same three**
  - Since not every member can commit at the sustaining level, some may wish to commit higher
- **Or, a commitment level right for you**

## My Commitment:



**A. One Year Horizon: Annual Charitable Giving to RCFC Charities Inc. To be Billed Quarterly**

☐ **RCFC Sustaining**     ☐ **RCFC Visionary**     ☐ **Other Amount**  
 \$125 Quarterly     \$250 Quarterly     \$\_\_\_\_\_ per \_\_\_\_\_  
 (month, quarter or year)

A. \$

**B. Three Year Horizon: Gifts to The Rotary Foundation (TRF) Annual Fund**

☐ **TRF Sustaining Member**     ☐ **Paul Harris Society**     ☐ **Other Amount**  
 \$25 per quarter     \$250 per quarter     \$\_\_\_\_\_

B. \$

**C. Perpetual Horizon: RCFC Legacy Fund.**

☐ **RCFC Sustaining - \$400 cash or equivalent**     ☐ **RCFC Visionary - \$1000 cash or equivalent**  
**OR** ☐ I have included/will include the RCFC Legacy Fund in my estate plan/will.     C. \$   
☐ I will donate assets to the RCFC Legacy Fund during 2015-16 (Securities, Tangible assets, etc.)


**D. Required: Club Operations, Dues, and Meals:**

D. \$  235.00

**Total of A., B., C. and D. above - Amount to be billed quarterly**

A+B+C+D= \$

## Payment Details:





**Rotary**

**Rotary Club of Fort Collins, Inc.**  
 P.O. Box 1206  
 Fort Collins, CO 80522-1206  
 "Founded in 1918"

**Billing Preference:** I prefer to receive my bill by either (check one) ☐ email, or ☐ U.S. Postal Service.

**Payment Preference:** I prefer to pay my Dues by: \_\_\_\_\_ and pay my Charitable Pledge by \_\_\_\_\_

☐ Check     ☐ Check  
☐ Credit card (complete information below)     ☐ Credit Card (same CC as Dues)

VISA/MC # \_\_\_\_\_ Expiration Date \_\_\_\_\_

Name on card \_\_\_\_\_ Security code \_\_\_\_\_

Name \_\_\_\_\_ Signature \_\_\_\_\_

☐ **RCFC Sustaining Member:** I commit to the Sustaining Level for Annual Charitable Giving, The Rotary Foundation Sustaining Level, and to at least \$400 cash or committed assets/planned giving to the RCFC Legacy Fund.

☐ **RCFC Visionary Member:** I commit to the Visionary Level for Annual Charitable Giving, The Rotary Foundation Paul Harris Society Level, and to at least \$1000 cash or committed assets/planned giving to the RCFC Legacy Fund.





THANK YOU!



## RCFC Charitable Analysis

- Membership Assumption: 150
- Members billed quarterly – charitable 110
  - Average = \$368.82 yearly / \$92.20 quarterly
  - High = \$1700 yearly / \$425 quarterly
  - 11 members average \$607 yearly / \$152 quarterly
  - 33 members @ \$400 yearly / \$100 monthly
  - 14 members @ 365 yearly / \$91.25 monthly
  - 41 members @ \$300 yearly / \$75 monthly
  - 10 members average \$122 yearly / \$30.25 quarterly
  - 40 members may be contributing annually, or not at all

My Conclusion – Relatively shared value system, and commitment to RCFC Charitable Service