



FOUNDATION GOALS

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Good morning! I'm delighted to be here with you to talk about my favorite Rotary topic — our Rotary Foundation.

It's so great to see many longtime Rotary friends — friends that I met perhaps at a previous International Assembly. But I'm especially pleased to see so many new faces — Rotary's future. Rotary's leadership for 2018-19.

Because of the energy that is created here, I look forward to this meeting every year. I hope you feel that energy and are as excited to be here as I am. I'm sure you've been told about this meeting from those who have been here before you. But, no matter what you were told, there is nothing like experiencing it for yourself. Words are inadequate to describe the experience, so immerse yourself in it — work hard, play hard — and enjoy every last second. This is by far the most magical meeting of Rotary International — the International Assembly, where we come together from all corners of the globe to learn about Rotary, to experience fellowship, and to build relationships that will last a lifetime. We enter to learn and go forth to serve!

As chair of The Rotary Foundation for 2018-19, it is my responsibility to establish goals for our Foundation during our year of service together — to hopefully inspire you even more to support our Foundation and to make 2018-19 the greatest year ever in our history. But I need your help.

Knowing that you support our Foundation and are committed to its success, I have established an exciting, comprehensive fundraising goal which is both challenging and achievable. It will require all of us to work, but it will allow us to fulfill our commitment to the world to improve the quality of life for all mankind — something I think we're all committed to.

Building on the tremendous success of The Rotary Foundation's centennial year, coupled with the success we are experiencing this year, the Annual Fund goal will be \$137 million.

Our goal for polio will be \$150 million, consisting of \$50 million from Rotarians, clubs, districts, and friends of Rotary. The remaining \$100 million is the match from the Gates Foundation.

Based on historical cash giving, our goal for global grant cash and other outright gifts is \$31.5 million. The goal for outright gifts to the Endowment Fund is \$26.5 million, and our goal for Endowment Fund expectancies is \$35 million. When you add these goals together, that makes our total comprehensive fundraising goal for 2018-19 \$380 million. Achievement of this goal will allow us to continue funding the myriad of life-changing programs Rotarians and Rotary clubs undertake each and every day.

In conjunction with our comprehensive fundraising goal, I want to share with you four priorities developed and adopted by the Trustees to continue moving our Foundation forward for the next three years. These priorities are straightforward and provide us with challenges and opportunities beginning 1 July 2018 — the day we take office.

Our first priority will come as no surprise to anyone: ending polio. Ending polio has been and continues to be the number one priority of our entire organization.

Last October, Rotary clubs worldwide hosted over 3,400 events in conjunction with Rotary's fifth annual World Polio Day. The event was held at the Bill & Melinda Gates Foundation's Seattle headquarters and viewed, via livestreaming, by some 150,000 people all across the world. That day was more than a progress report. It was a testament to the unsung heroes of the polio eradication effort. It was a testament to you, my fellow Rotarians. For some 30 years, Rotarians have participated in immunization days; we have persuaded parents to allow their children to be immunized; we have pushed governments to make good on their promises; we have spread awareness; we have given of our time, our talent, and our treasure — and the list goes on and on. We have done this to ensure that no child ever suffers from this horrible, preventable disease again.

We are certainly aware that ending polio is not a sprint — it's a marathon. And today, we are on the final leg of that marathon with the finish line in sight — but we are not there yet. Our greatest challenge is still in front of us. We made a promise to the children of the world, and because of that promise, polio cases have plummeted more than 99.9 percent. We must remain committed, and we must fulfill our promise.

The second priority is to increase sustainability of our service efforts within the six areas of focus. Success in our global grants program depends upon Rotary clubs' and districts' conducting thorough needs assessments. For Rotary, a service project is sustainable only if it provides a long-term solution to a problem that the members of that community can support long after the grant funding ends. It is not enough that we think we know what a community needs — it is critical that we work with the community to see what that community really needs and to get them to buy in — to own the project.

Additionally, where possible, purchase equipment and technology from local sources. Leverage your grant by seeking and partnering with local entities. And, above all, stay engaged — be sure to measure your success over time so that your project remains sustainable and continues to provide the support and services that lead you to do the project in the first place. That is how Rotary can make a lasting impact.

Our third priority is to encourage every district to use all of their District Designated Funds each year — to encourage doing more good in the world. There are many ways these funds can be used to benefit your clubs, district, and the world, including using

them for district grants, using them for global grants, giving them to PolioPlus, or contributing them to another district to enhance a project.

Now is the time to review your district's balance, determine how much you will have available, and plan how you and your district will use these funds in the coming year. Your Rotarians did not contribute money to our Foundation to build a savings account. They made their contributions for the purpose of Doing Good in the World. There is certainly no shortage of opportunities. So engage your Rotarians. Put those funds to work now.

Our fourth priority is one that is near and dear to my heart. It's something I've been promoting for almost 30 years since I found out that our permanent endowment fund was only \$2 million. We have made tremendous progress in those ensuing years, but we have so much potential if we will only tell our story. Very simply, it is to build our Rotary Foundation to \$2,025 million by 2025, and we are well on track to do just that. Our Endowment today stands at just over \$1.1 billion, with \$421 million in hand and \$767 million in commitments. Just imagine the good we will be able to do with a \$2 billion Endowment!

In order for us to reach this goal, we not only need to increase our membership, but we also need to increase the number of Rotarians and others supporting our Foundation — we need to expand our donor base. True philanthropy is not measured by the size of one's gift but rather by the gift in relation to one's financial ability. Rotarians should be encouraged to make our Foundation their Foundation — and, if not their charity of choice, at least one of their charities of choice.

Charity Navigator is the largest and most utilized evaluator of charities in the United States, evaluating over 9,000 charities. Their rating system examines two broad areas of a charity's performance: their financial health, and their accountability and transparency. These ratings show donors how efficiently a charity uses their support today, how well it has sustained its programs and services over time, and its level of commitment to good governance, best practices, and openness with information. By providing these ratings, it is Charity Navigator's hope that charitable donors can make intelligent giving decisions so the nonprofit sector can improve its performance.

Again in 2017, The Rotary Foundation received the highest possible score from Charity Navigator for its strong financial health and its commitment to accountability and transparency. This is the 10th straight year we have received a four-star rating. On their webpage, they list the top 10 best charities everyone's heard of, and The Rotary Foundation is tied for first place with two other charities with a perfect score of 100.

Our effort to build our Foundation to \$2,025 million by 2025 presents a compelling incentive for gifts and commitments to our Foundation. It provides each one of us with the prestige of establishing our own personal legacy within Rotary's Endowment — a gift to one of the best stewards for charitable giving in the world, our Foundation, for the "purpose of doing good."

Jetta and I are among those who firmly believe in our Foundation. We are creating a legacy with Rotary through our contributions. We established our endowment fund in the early '90s because we understood that giving to the Endowment ensures Rotary's

life-saving programs will positively impact generations to come in perpetuity. We continue to build it. It was the right decision then and is still the right decision today. Our endowment provides income on an annual basis to the World Fund.

We believe in our Foundation, and we both want our commitment to Rotary to be in perpetuity — in other words, we want to be Rotarians forever. Like those who plant trees today under which they will never sit, we want to ensure a funding source for Rotary that will allow Rotary to always be able to address the needs of the world. We invite you and Rotarians everywhere to join us in sharing that awesome but necessary responsibility. Rotary's promise to future generations can be your legacy, too! To put it very simply: your legacy, Rotary's promise!