

SETTING AND ENTERING ANNUAL FUND GOALS

For Club Officers and Club Foundation Chairs

Entering Annual Fund goals is necessary to qualify your club to participate in grants.

Half of the Annual Fund donations come back to our District as District Designated Funds (DDF) – used for matching club funds as District grants and Global grants. The other half is used by The Rotary Foundation for Global Grants and Polio support through the World Fund.

PREPARATION

Step 1: Be sure to have your RI website user name and password. <https://my.rotary.org/en/user>

Step 2: Print out and review your **Club Fundraising Analysis report** (Grant Reports on RI website). This is a 5-year report of your club's annual fund goals and actual contributions and membership numbers..

SET ANNUAL FUND BENCHMARK

1. Current Membership # (from Club Fundraising report) _____
2. Annual Fund Benchmark is \$100 per member contribution (set by TRF many years ago)
3. **Your club Benchmark (# Members x \$100)** _____

SET RECOMMENDED GOAL FOR NEXT YEAR

Approach #1: Benchmark Goal – if your club contributions typically fall below your club Benchmark (above), use the Benchmark (b) as your club annual fund goal. Enter into Rotary Club Central and tell your club what the goal is and how they can contribute to the Annual Fund.

Approach #2. Challenge Goal – If your club typically contributes more than the Benchmark (b), set a challenge goal, such as 5% more than last year's annual fund contributions. Enter the challenge goal into Rotary Club Central.

PRESENT TO BOARD

By or at the start of the new Rotary year, review your club's contribution history (Club Fundraising Analysis report) along with your recommended goal for the year. As they understand how you arrived at the goal, and that contributions come back to district and clubs to do projects, they will get on board and support the Annual Fund.

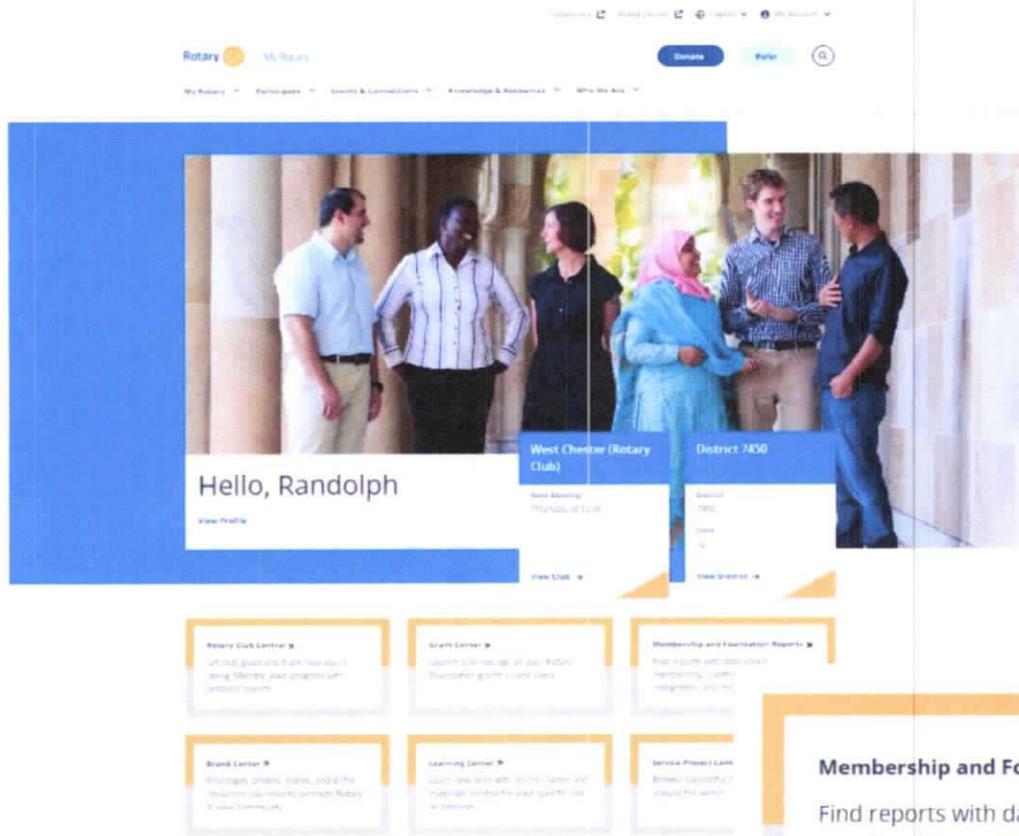
ENTER YOUR GOALS

Annual Fund goals are entered in **Rotary Club Central** on the RI website. Progress toward your goal is automatically reported throughout the year. Now, after your club has received District Grant Training, you're set to apply for District Grants!

Be sure members know how they can contribute to the Annual Fund. Keep them updated as the year progresses. Make sure they know that Rotary Direct allows an automatic monthly contribution to the Annual Fund - (<https://my.rotary.org/en/rotary-direct>) - \$10 per month per member will make a HUGE difference!

Thank you for supporting the work of Rotary through the Annual Fund!

Information about Club Giving is at My Rotary / - www.myrotary.org -
 Membership & Foundation Reports



Contributions & Recognition

- Club Giving
- Paul Harris Fellow and Benefactor Report
- Club Recognition Summary**
- Club Foundation Banner Report
- Major Donor, Arch C. Klumph Society and Bequest Society Report
- Club Fundraising Analysis**
- Paul Harris Society Report
- Monthly Contribution Report
- PolioPlus Report
- SHARE Contribution Detail

Members

- Club Data
- Membership Leads
- Rotary Club Members

Rotary CLUB RECOGNITION SUMMARY
 AS OF 8 JANUARY 2025
 West Chester, PA, United States

Rotary ID	Club Name	Club Members	Rotary ID	Club Name	Club Members	Rotary ID	Club Name	Club Members
1054	Rotary Club of West Chester	57	1054	Rotary Club of West Chester	57	1054	Rotary Club of West Chester	57
002028	Abel, Brad	Y	002028	Abel, Brad	Y	002028	Abel, Brad	Y
02121422	Abonizio, Ruby	Y	02121422	Abonizio, Ruby	Y	02121422	Abonizio, Ruby	Y
11807796	Adams, Austin	Y	11807796	Adams, Austin	Y	11807796	Adams, Austin	Y
0015306	Alford, Lynn	Y	0015306	Alford, Lynn	Y	0015306	Alford, Lynn	Y
11044965	Alford, Patricia Helene	Y	11044965	Alford, Patricia Helene	Y	11044965	Alford, Patricia Helene	Y
0048796	Alford, Richard	Y	0048796	Alford, Richard	Y	0048796	Alford, Richard	Y
1014054	Alford, Melissa	Y	1014054	Alford, Melissa	Y	1014054	Alford, Melissa	Y
10118082	Alford, Steve	Y	10118082	Alford, Steve	Y	10118082	Alford, Steve	Y
10719361	Alford, Tracy Ann	Y	10719361	Alford, Tracy Ann	Y	10719361	Alford, Tracy Ann	Y
0040321	Allen, Matthew D.	Y	0040321	Allen, Matthew D.	Y	0040321	Allen, Matthew D.	Y
11781130	Allen, Glenn K.	Y	11781130	Allen, Glenn K.	Y	11781130	Allen, Glenn K.	Y
0008989	Allen, Susan	Y	0008989	Allen, Susan	Y	0008989	Allen, Susan	Y
11044177	Alonzo, Andrea M	Y	11044177	Alonzo, Andrea M	Y	11044177	Alonzo, Andrea M	Y
12045787	Alonzo, David	Y	12045787	Alonzo, David	Y	12045787	Alonzo, David	Y
1102954	Alonzo, Steven P.	Y	1102954	Alonzo, Steven P.	Y	1102954	Alonzo, Steven P.	Y
11103827	Alonzo, Tracy	Y	11103827	Alonzo, Tracy	Y	11103827	Alonzo, Tracy	Y
1104399	Alonzo, Jeff	Y	1104399	Alonzo, Jeff	Y	1104399	Alonzo, Jeff	Y
1104327	Alonzo, Mother	Y	1104327	Alonzo, Mother	Y	1104327	Alonzo, Mother	Y
1101541	Alonzo, Susan H.	Y	1101541	Alonzo, Susan H.	Y	1101541	Alonzo, Susan H.	Y
0040352	Alonzo, Christine P.	Y	0040352	Alonzo, Christine P.	Y	0040352	Alonzo, Christine P.	Y
1110003	Alonzo, Carolyn	Y	1110003	Alonzo, Carolyn	Y	1110003	Alonzo, Carolyn	Y
10114239	Alonzo, Jessica	Y	10114239	Alonzo, Jessica	Y	10114239	Alonzo, Jessica	Y
1000008	Alonzo, Francis H.	Y	1000008	Alonzo, Francis H.	Y	1000008	Alonzo, Francis H.	Y
1101576	Alonzo, Clifford E.	Y	1101576	Alonzo, Clifford E.	Y	1101576	Alonzo, Clifford E.	Y
1101733	Alonzo, Katherine	Y	1101733	Alonzo, Katherine	Y	1101733	Alonzo, Katherine	Y

A brief history of District 7450 Global Grants 2014 to 2024

2014-2024	Grants #	World Fund \$'s	Total Funding \$'s
Approved	8	\$ 146,129	\$ 446,287
Closed	116	\$ 1,368,053	\$ 4,928,367
	124	\$ 1,514,182	\$ 5,374,654
Cancelled	18	\$ 221,647	\$ 528,594

Global Grants history by Club

	District 7450 Global Grants By Club 2011 to 2024		
	International	Host	Total
Central Chester County (Lionville)	45		45
Longwood	5		5
Philadelphia		4	4
Media	3	1	4
Westtown-Goshen	3		3
Swarthmore	1	1	2
Wayne		2	2
Abington		1	1
Ardmore	1		1
King of Prussia	1		1
NE Philadelphia Cheltenham Rockledge	1		1
Paoli-Malvern-Berwyn	1		1
Southwest Philadelphia-Eastwick		1	1
West Chester	1		1

2024-2025 District Grants

Project	Club	DDF	Project Budget
Active Citizenship for Underprivileged Students in Lebanon	Philadelphia	4,000	8,000
Book Bags for Schoolchildren	Longwood	5,000	14,000
Eastern Caribbean Literacy Project for School Children	Greater West Chester Sunrise and West Chester	3,000	6,000
Karama Education Center Digital Learning Center	Conshohocken-Plymouth-Whitemarsh	10,000	33,842
Kids Smiles	Wayne	1,000	2,000
Life Turning Point Play Space	Chestnut Hill (Philadelphia)	1,750	3,500
Starting School Write	Levittown-Fairless Hills	1,000	2,000
Supporting 3 Food Banks in the City of Chester, PA	Chester	1,500	3,000
Three books and a backpack	Broomall	1,038	2,075
Water Access, Sanitation and Hygiene in Enriquillo, Dominican Republic	North Philadelphia (Madrugadores)	4,250	8,500
THANKSGIVING Baskets for Needy Families	Glenside-Abington	1,200	2,400
Library Museum Passes	Media	997	1,994
2024-2025 DISTRICT GRANT TOTALS		\$34,734.50	\$87,311.00

ROTARY DIRECT

Rotary's recurring giving program



ROTARY DIRECT SAVES...

- ✓ **Time** — Sign up once to give continuous support
- ✓ **Money** — Lower administration costs means more money for programs
- ✓ **Lives** — Give to The Rotary Foundation to do good in the world

There are three ways to enroll in Rotary Direct:

- Online:** my.rotary.org/en/rotary-direct
By mail: Rotary Direct, 17th Floor, Annual Giving
 One Rotary Center
 1560 Sherman Avenue
 Evanston, IL 60201-3698 USA
By phone: +1-866-976-8279

Manage your recurring giving at any time by signing in to My Rotary and going to Donor Self-Service.



YES! I INTEND TO GIVE US\$1,000 OR MORE ANNUALLY AND WILL JOIN THE PAUL HARRIS SOCIETY.*

YES! I WILL ENROLL IN ROTARY DIRECT.

Name _____

IF YOU ARE A ROTARIAN, PLEASE COMPLETE.

Rotary membership ID _____

Club name _____

Club number _____

Billing address _____

City _____ State/Province _____

Postal code _____ Country _____

Phone _____

Email _____

Contributions are tax deductible where allowed by law. For security purposes, please do not send credit card contributions via email.

**Note: By checking this box, donors notify The Rotary Foundation of their intention to contribute US\$1,000 or more every Rotary year to the Annual Fund or PolioPlus Fund. Learn more at rotary.org/phs*

GIFT DESIGNATION (choose one)

- Annual Fund-SHARE Other _____
 PolioPlus Fund

RECURRING GIFT AMOUNT (minimum US\$10)

- \$25 \$85 \$100 \$250 \$1,000 Other _____
 Currency (if not US\$) _____

FREQUENCY

- Monthly Quarterly Annually (specify month) _____

CHECKING ACCOUNT, please attach a voided check
Available for U.S. and Canada bank accounts only
Not available online

CREDIT OR DEBIT CARD

- Visa MasterCard AmEx Discover

Card number

Expiration / CVN

Signature _____



Your privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data you share with Rotary will only be used for official Rotary business, such as for Rotary fundraising purposes, financial processing, donor recognition, and record keeping. Personal data collected with this contribution is subject to Rotary's Privacy Policy found at rotary.org/privacy.



PAUL HARRIS FELLOW RECOGNITION TRANSFER REQUEST FORM

Please send your completed form only once. If you have questions regarding recognition or contributions to The Rotary Foundation, please contact Rotary's Support Center at 1-866-9ROTARY (1-866-976-8279), or email: contact.center@rotary.org or, contact the Rotary International office that serves your area.

Contributions can be made at www.rotary.org/give.

1. RECIPIENT OF RECOGNITION

Transfer Recognition Points to:

Name: _____ Recipient ID Number: _____
 Club Name: _____ Club No: _____ District No: _____
 Address: _____ City: _____ State/Province: _____
 Country: _____ Postal Code: _____
 Daytime Phone: _____ Email Address: _____

2. TRANSFER RECOGNITION POINTS

Foundation Recognition Points Amount: _____ (Minimum of 100 points)

Transferring Recognition Points from: Individual ID Number: _____ Club Number: _____ District Number: _____

AUTHORIZED SIGNATURE (required): _____ Print Name: _____

3. SHIPPING INFORMATION — Recognition materials only

Presentation Date: _____

Send recognition to: (Check one; if left blank, recognition will be sent to club president)

Club President Club Secretary Club Treasurer Club Foundation Chair Other, record information below

Name: _____ Address: _____
 City, State/Prov.: _____ Country, Postal Code: _____
 Daytime Phone: _____ Email Address: _____

4. INDIVIDUAL COMPLETING THIS FORM

Name: _____ Daytime Phone: _____

Email Address: _____ Date: _____

Please send this form to the appropriate address.

UNITED STATES

The Rotary Foundation
 14280 Collections Center Drive
 Chicago, IL 60693 USA
 Tel: 1-866-976-8279 (toll-free)
 Fax: +1-847-328-4101

contact.us@rotary.org

CANADA

The Rotary Foundation (Canada)
 c/o 911600
 P.O. Box 4090 STN A
 Toronto, ON M5W 0E9
 Canada
 Tel: 1-866-976-8279 (toll-free)
 Fax: +1-847-328-4101

contact.canada@rotary.org

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 Kreuzstraße 34
 40210 Düsseldorf
 Germany

RI BRAZIL OFFICE

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 Rua Tagipuru 209
 01156-000
 São Paulo, SP
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 Fax: (55-11) 3667-6575

ribr@rotary.org

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 Witikonstrasse 15
 CH-8032 Zurich
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 Fax: (41-44) 422 50 41

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rikorea@rotary.org

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 124 Janpath
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RI SOUTHERN SOUTH AMERICA OFFICE

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 Florida 1, Piso 2
 1005 Buenos Aires, CF
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 P.O. Box 1415
 Parramatta, NSW 2124
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 Tel: (61-2) 8894 9800
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rippo@rotary.org

RI GREAT BRITAIN AND IRELAND (RIBI) OFFICE

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 Kinwarton Road
 Alcester
 Warwickshire B49 6PB
 England
 Tel: 01789 765411
 Fax: 01789 764916

ribi@rotary.org

EVERY ROTARIAN EVERY YEAR

Giving Made Easy

Whether you choose to make a one-time, recurring, or matching gift, it's easy to give to The Rotary Foundation.

Online Giving

Visit rotary.org/donate to make a one-time or recurring gift online.

Rotary Direct

Support our work year-round by making a recurring gift through Rotary Direct. You choose how much and how often you want to give. It's a simple and secure way to make a big impact. Visit myrotary.org, rotary-direct.

Matching Gifts

Double the good your gift can do by having your employer match it. Visit rotary.org/matchinggifts or ask your human resources department about your company's matching gifts and volunteer grants programs.

The Rotary Foundation of Rotary International

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
rotary.org/donate

DOING GOOD IN THE WORLD



TAKE ACTION:
rotary.org/donate

957-FL-1200

Yes! I want to help The Rotary Foundation keep Doing Good in the World!

Name _____

If you are a Rotarian, please complete:

Rotary Membership ID _____

Rotary Club of _____

Club Number _____

Billing Address _____

City _____ State/Prov. _____

Postal Code _____ Country _____

Phone _____

Email _____

- Check enclosed, payable to The Rotary Foundation.
- Contact me about joining the Paul Harris Society.

Contributions are tax deductible where allowed by law.

Please direct my gift to (choose one):

- Where the need is greatest (Annual Fund-SHARE)
- Providing clean water
- Supporting education
- Fighting disease
- Saving mothers and children
- Promoting peace
- Growing local economies
- Responding to disasters

Gift Amount (US\$)

- \$10 \$25 \$85 \$100 Other: \$ _____

Please send your contributions to:

The Rotary Foundation
14280 Collections Center Drive
Chicago, IL 60693
USA

For more information regarding where to send in your contribution, visit myrotary.org/check-draft-or-wire-payments

International Office Locations:

Brazil: São Paulo, Brazil
Europe/Africa: Zurich, Switzerland
Japan: Tokyo, Japan
Korea: Seoul, Korea
South Asia: New Delhi, India
South Pacific and Philippines: Parramatta, Australia
Rotary International in Great Britain and Ireland: Alcester, England

FORM: 000004

Instructions for a direct transfer from an Individual Retirement Account (Qualified Charitable Distribution)

- ✓ **Please note:** IRA transfers benefit **Annual Fund SHARE** unless another designation is indicated on the check or accompanying paperwork from your IRA administrator
- ✓ Use a traditional Individual Retirement Account or other qualified plan (inherited, inactive SEP or SIMPLE)
- ✓ Be 70 ½ years of age or older (IRS publication 590-B)
- ✓ Use your IRA provider's forms (or process) to request a direct transfer from your IRA to The Rotary Foundation by check or wire using the instructions below
- ✓ Alternatively, if you can write a check payable to The Rotary Foundation from your IRA account, send it to the address below
- ✓ **Please ensure that your name and Rotary ID are included so that we may properly credit your gift**
- ✓ Do not expect a charitable tax receipt (or take a tax deduction) because the transferred amount should not be treated as taxable income
- ✓ Use The Rotary Foundation the EIN: 36-3245072

Additional considerations

If you prefer a designation other than AF-SHARE, please request that your administrator include that designation **on the check or paperwork** to ensure it is processed in a timely manner. For example, you can include:

- A named endowed fund number E00000
- A Rotary program name such as PolioPlus, Disaster Response, Peace Centers, or any of the seven areas of focus

Reach out to your Rotary staff liaison or giftadministration@rotary.org for help

Where, how, and when to send

Make your request in time for the payment to be **received** at the Rotary Foundation **before 31 December** each year.

Checks should be sent to:

THE ROTARY FOUNDATION
14280 COLLECTIONS CENTER DRIVE
CHICAGO, IL 60693

Wire transfer instructions are provided upon request by giftadministration@rotary.org

Note: Qualified Charitable Distribution benefits do not apply for gifts directed to a Donor Advised Fund or to fund a Life Income Agreement. To speak to a Planned Giving Officer about a gift to a Donor Advised Fund or one that pays you and your loved one lifetime payments, please contact plannedgiving@rotary.org

District Foundation Ambassador Program



What is it?

Five District Rotary Foundation “Ambassadors” – aligned with five District AG Areas – who work with AGs and, club leaders and Club Foundation Chairs to build regular and increased support of The Rotary Foundation and generate more grant projects.

Ambassador Program Goals

- Insure that all Rotary club members understand the function and value of The Rotary Foundation and consider support to be a part of their Rotary experience.
- Provide Club Foundation Chairs with a complete set of **presentation and communications materials** to use for club meetings and mailings – easy-to-use resources to engage their club members
- Provide club Boards and Foundation Chairs with guidance on creating an **annual Foundation giving plan** for their clubs including timing and possible special events.
- Encourage the development of **grant projects** in every club and provide the Club Foundation Chair and/or other grant leaders the forms and support needed for successfully obtaining grants.
- Build a **community of Foundation Chairs** – at both Area and District levels – where the Chairs can motivate and support each other.

Next Steps

- Ambassadors will be contacting AGs: Area 1: Randy Lindel, Area 2: Charles Streitwieser, Area 3: Russ deFuria, Area 4: Warren Sell, Area 5: Bonnie Korenel.
- Ambassadors will schedule in person or Zoom meetings with Club Foundation Chairs or Club Presidents-Elect to outline the program, solicit their support and request a near-term meeting speaker opportunity for the Ambassador.
- Provide each club Foundation Chair via email with a **toolkit** of presentations and handouts to be used in club meetings 4-5 times during the year.

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Next Steps

Ambassadors will be contacting AGs and then Club Foundation Chairs:

- **Area 1:** Randy Lindel – rlindel@gmail.com – Bensalem, Bristol, Feasterville, Langhorne, Levittown-Fairless Hills, Middletown, NE Phila- Cheltenham- Rockledge, Pennsylvania East
- **Area 2:** Charles Streitwieser - streitwieser@me.com - C-P-W (Evening), Chestnut Hill, Conshohocken-Plymouth-Whitemarsh, Glenside-Abington, Jenkintown, King of Prussia, Lower Main Line, Philadelphia, Philadelphia Happy Hour, Wayne
- **Area 3:** Russ deFuria - DG0708@ocomfort.com - Ardmore, Broomall, Bryn Mawr, Glen Riddle, Media, Newtown Square, Swarthmore, Upper Darby-Lansdowne
- **Area 4:** Warren Sell - warrensell.rotary@outlook.com - Central Chester County, Greater West Chester Sunrise, Paoli-Malvern-Berwyn, Phoenixville, Thorndale-Downingtown, Upper Main Line, West Chester, West Chester Passport, Westtown-Goshen
- **Area 5:** Bonnie Korengel - Bonniekorengel@gmail.com - Chester, Chichester, Coatesville, Concordville-Chadds Ford, Longwood, Oxford, Southwest Philadelphia-Eastwick, Twin Valley