



## ROTARY CLUB OF WINDSOR

### Two Foundations: The Basics

Updated September 2019

Names of the two (501(3)(c) Funds	The Rotary Foundation The philanthropic arm of Rotary International	Windsor Rotary Community Foundation The philanthropic Foundation of the Rotary Club of Windsor, California	
		Operating Fund	Endowment Fund
<b>Foundation's Parent Organization</b>	Rotary International Club Chairperson: John LeCave	Rotary Club of Windsor Directors: Ed Turner, Carl Wiuff	
<b>Mission in brief</b>	Advance world understanding, goodwill, and peace through improvement of health, education, disaster relief, disease prevention and alleviation of poverty.	Improve quality of life through service and education in Windsor community and service area	Build up a large fund over many years that will eventually produce earnings to fund humanitarian activities
<b>Name of main funds</b>	Annual Fund, Endowment Fund Polio Plus Fund Annual Reports: <a href="http://therotaryfoundation.org">therotaryfoundation.org</a>	Operating Fund	Long term growth fund
<b>Where is the money kept?</b>	Accounts held by The Rotary Foundation in Evanston, Ill. In 2018, Endowment Fund at \$805 million; 414.7 million in grants for 2017-18	Checking account approx. bal at 8/31/19 is \$15,717	Dodge & Cox Mutual Fund – approx. bal at 8/31/19 is \$360,676
<b>Goes to:</b>	TRF Humanitarian Programs including Polio Eradication, Peace Centers, Global Grants, District Grants and more	Community Service including legacy projects, scholarships and special projects	Fund is intended to grow to \$500K and have principal remain intact. Current objective is to re-invest earnings to achieve growth; when \$500K goal is reached, then a portion of earnings each year would be used to fund projects.
<b>Interest-earning endowment fund</b>	Endowment Fund	Checking account – does not earn interest	Endowment Fund – earns through donations, reinvested dividends, interest, and stock value appreciation
<b>Managed by</b>	Trustees of the Rotary Foundation (separate from R.I. Board of Directors)	Club Board of Directors = Board + Carl W	

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<b>Main Recognition Program</b>	<ul style="list-style-type: none"> <li>• <b>Paul Harris Fellow (PHF):</b> (\$1,000)</li> <li>• A <b>Sustaining Paul Harris Fellow</b> gives \$100 per year toward that goal</li> <li>• <b>Paul Harris Society:</b> Contributors of \$1000/year</li> <li>• <b>Major Donors:</b> Contributors of \$10,000 or more</li> </ul>	<b>John Lewis Fellow:</b> (\$1,000 total giving)	
<b>Associated jargon</b>	<ul style="list-style-type: none"> <li>• “I’ll give to my ‘Paul Harris’” – donate to TRF as a Sustaining Fellow (see above), gaining points for Paul Harris Fellow recognition</li> <li>• “Recognition points” – matching points to achieve PHF; may be transferred among donors</li> </ul>	“I’ll give money to WRCF Operating Fund to support current WRCF projects.” This means funds can be used now/this year/next year. Qualifies for John Lewis Fellow credit.	“I’ll give to my ‘John Lewis’ [Fellowship] – donate to Endowment Fund.” This means funds will be invested for the future. Qualifies for John Lewis credit.
<b>Who were Paul and John?</b>	Paul Harris: Founder of Rotary	John Lewis: Club Founder and Charter President (1987-88) Rotary Club of Windsor	
<b>Other Recognition Levels</b>	<ul style="list-style-type: none"> <li>• Major Donor: \$10,000</li> <li>• Paul Harris Society: \$1,000/ year</li> </ul> By gift or through estate: <ul style="list-style-type: none"> <li>• Benefactor: \$1,000 to Permanent Fund</li> <li>• Bequest Society: /\$10,000 to Permanent Fund</li> </ul>	As may be determined by the Board	As may be determined by the Board
<b>Funds raised by:</b>	Voluntary contributions from Rotarians and others Partnerships with other humanitarian donors, notably the Bill & Melissa Gates Foundation	<ul style="list-style-type: none"> <li>• Fundraising activities</li> <li>• Grants – District Matching &amp; others</li> <li>• Voluntary contributions from Rotarians and others</li> </ul>	<ul style="list-style-type: none"> <li>• Contributions from Rotarians and others specifically directed to the “Endowment”</li> <li>• Historically, some funds from major fundraiser have been allocated to this fund</li> </ul>
<b>Learn more:</b>	www.rotary.org “The Rotary Foundation”	www.windsorrotary.org	
<b>TAX ID:</b>	36-3245072	68-0185065	68-0185065

Comment [MM1]: