



The
Rotary
Foundation



June 2023 Status Review

Rotary District 9830

June 2023

Status Review

- Global Highlights
- District's Foundation fundraising results YE 2022-23
- Comparisons with:
 - other Zones in SPPO region
 - other districts in the Zone
- YE 2022-23 vs YE in prev. years
- Graphically and as data tables.



Global TRF Contributions

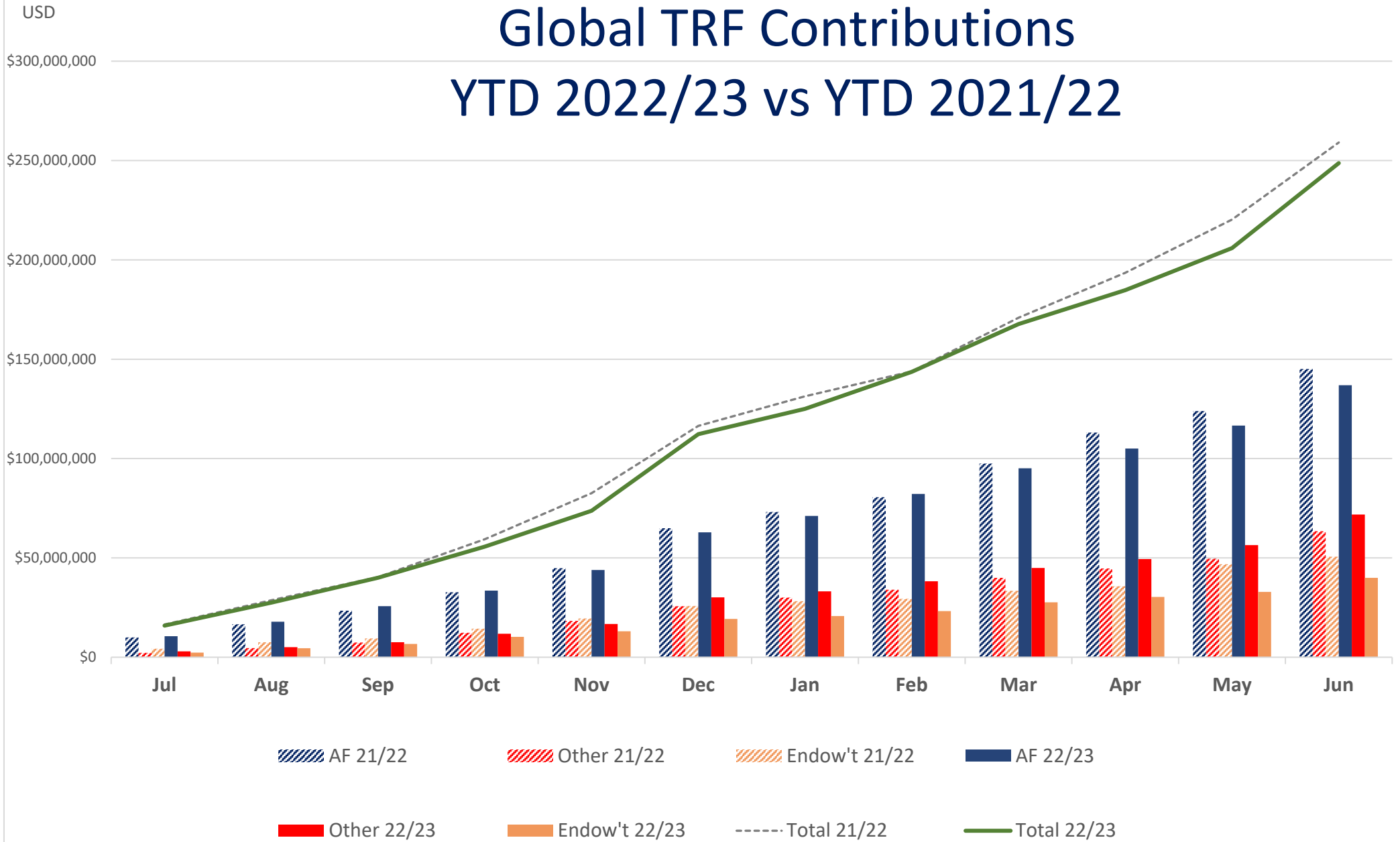
June 2023

	30-Jun-23	30-Jun-22	↑ ↓
Annual Fund	\$137.1 mil	\$145.5 mil	-5.8%
PolioPlus Fund	\$38.1 mil	\$32.7 mil	+16.4%
Endowment Fund	\$40.0 mil	\$50.8 mil	-21.2%
Other Funds	\$38.3 mil	\$39.6 mil	-3.4%
Total	\$253.4 mil	\$268.6 mil	-5.7%

Excludes pledges and Gates, includes DAF. Preliminary, unaudited results.

Global TRF Contributions

YTD 2022/23 vs YTD 2021/22



Figures are preliminary, unaudited results; excludes pledges

Local highlights

YE June 2023

FY 2022-23

Annual Fund Per District

	21-22	22-23	↑↓	
Philippines	\$350,536	\$407,742	+\$57,206	+16.3%
Australia	\$186,436	\$182,065	-\$4,370	-2.3%
NZ/Pacific	\$104,516	\$88,562	-\$15,954	-15.3%
AVERAGE	\$228,801	\$242,799	+\$13,998	+6.1%
District 9830	\$165,164	\$82,166	-\$82,999	-50.3%

FY 2022-23

Polio Plus Per District

	21-22	22-23		↑↓
Philippines	\$74,406	\$85,762	+\$11,356	+15.3%
Australia	\$53,991	\$52,526	-\$1,465	-2.7%
NZ/Pacific	\$32,992	\$24,275	-\$8,717	-26.4%
AVERAGE	\$57,867	\$59,602	+\$1,735	+3.0%
<u>District 9830</u>	\$30,556	\$29,293	-\$1,263	-4.1%

FY 2022-23

Endowment Fund Per District

	21-22	22-23		↑↓
Philippines	\$52,096	\$117,331	+\$65,235	+125.2%
Australia	\$12,619	\$27,043	+\$14,424	+114.3%
NZ/Pacific	\$8,333	\$55	-\$8,278	-99.3%
AVERAGE	\$24,800	\$52,686	+\$27,885	+112.4%
<u>District 9830</u>	\$0	\$6,993	+\$6,993	-

FY 2022-23

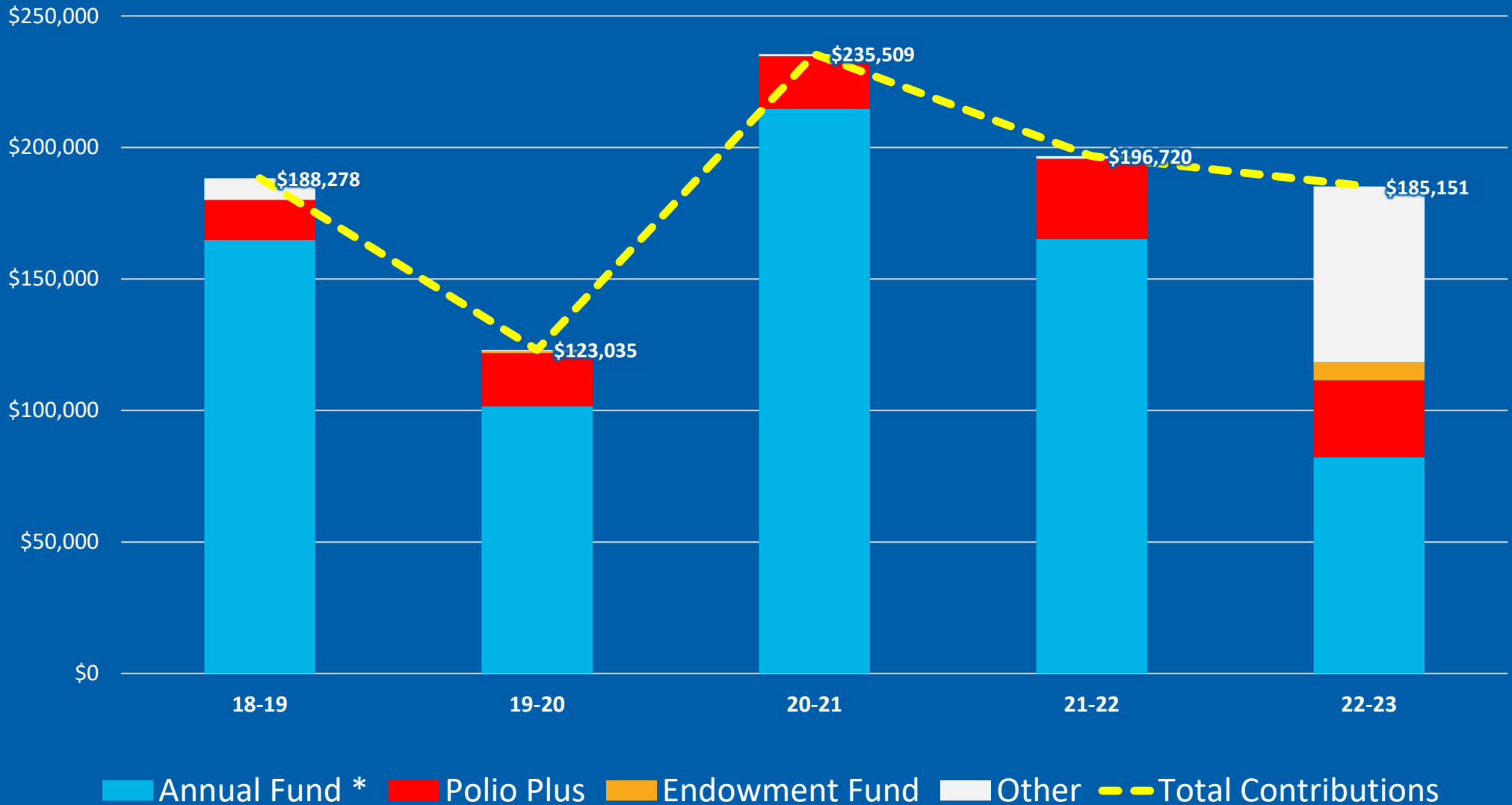
Other Funds Per District

	21-22	22-23		↑↓
Philippines	\$35,311	\$81,733	+\$46,422	+131.5%
Australia	\$28,467	\$40,119	+\$11,652	+40.9%
NZ/Pacific	\$5,969	\$29,488	+\$23,519	+394.1%
AVERAGE	\$27,772	\$52,171	+\$24,399	+87.9%
<u>District 9830</u>	\$1,000	\$66,699	+\$65,699	+6569.9%

'Other Funds' include directed gifts and contributions to approved grants.

Five-Year Contributions History

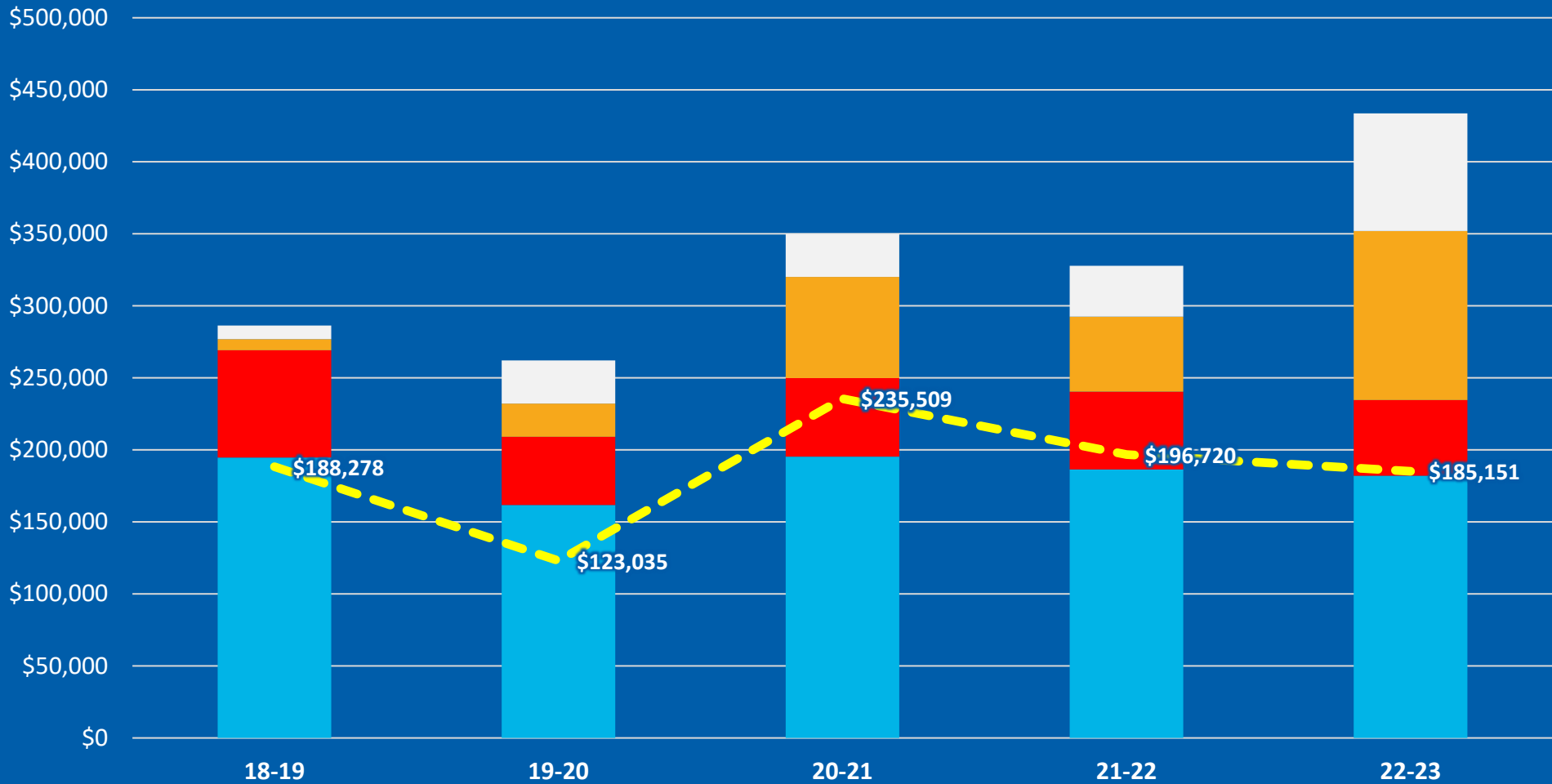
Contributions for twelve months to end of Jun
from Rotary District 9830



Giving history vs other districts in Australia

Avg Contrib's / District in Australia - Jun YTD

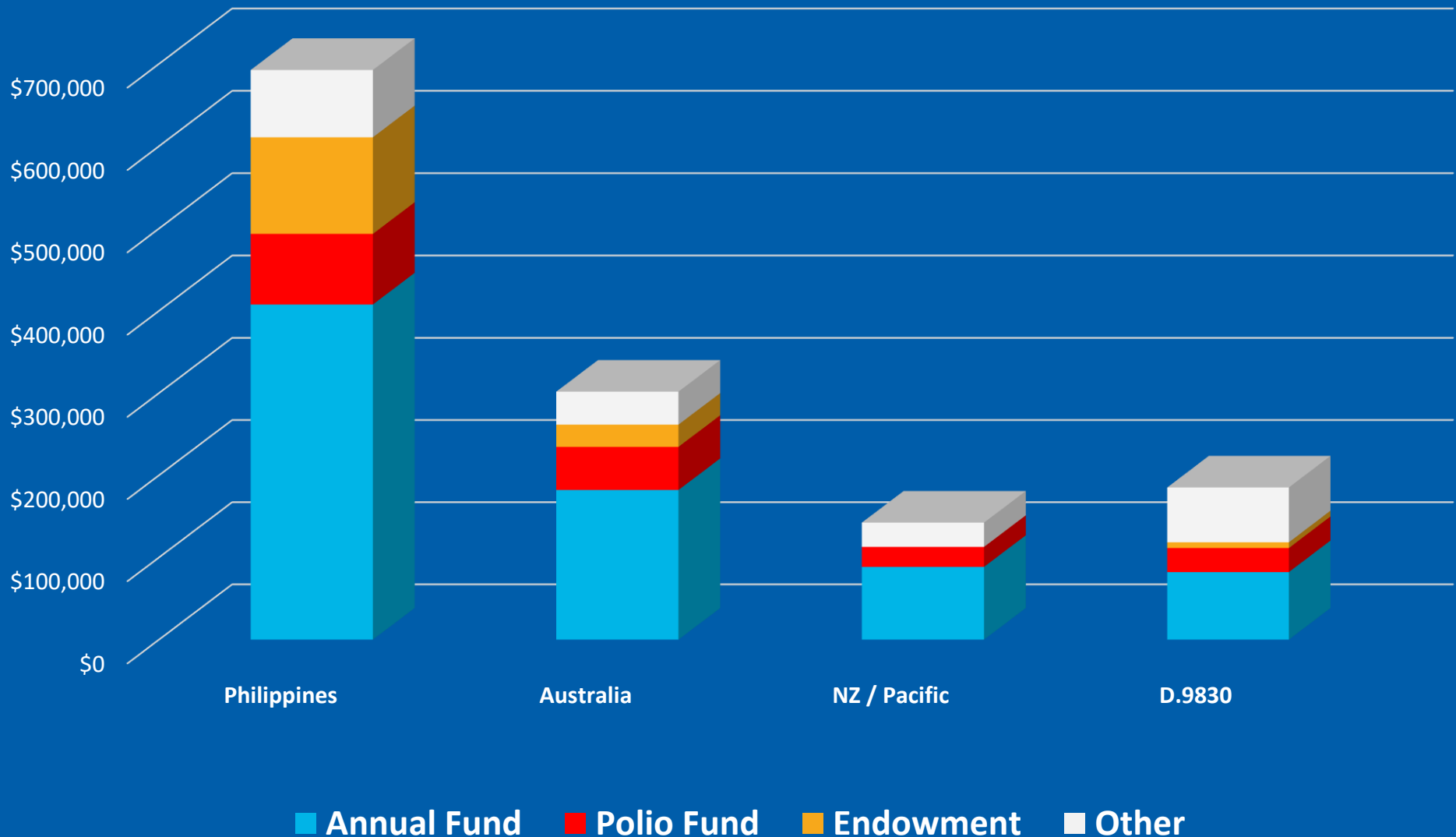
Line = D.9830 Total for FY || Bars = District Averages for FY



Annual Fund Polio Endowment Other District Total

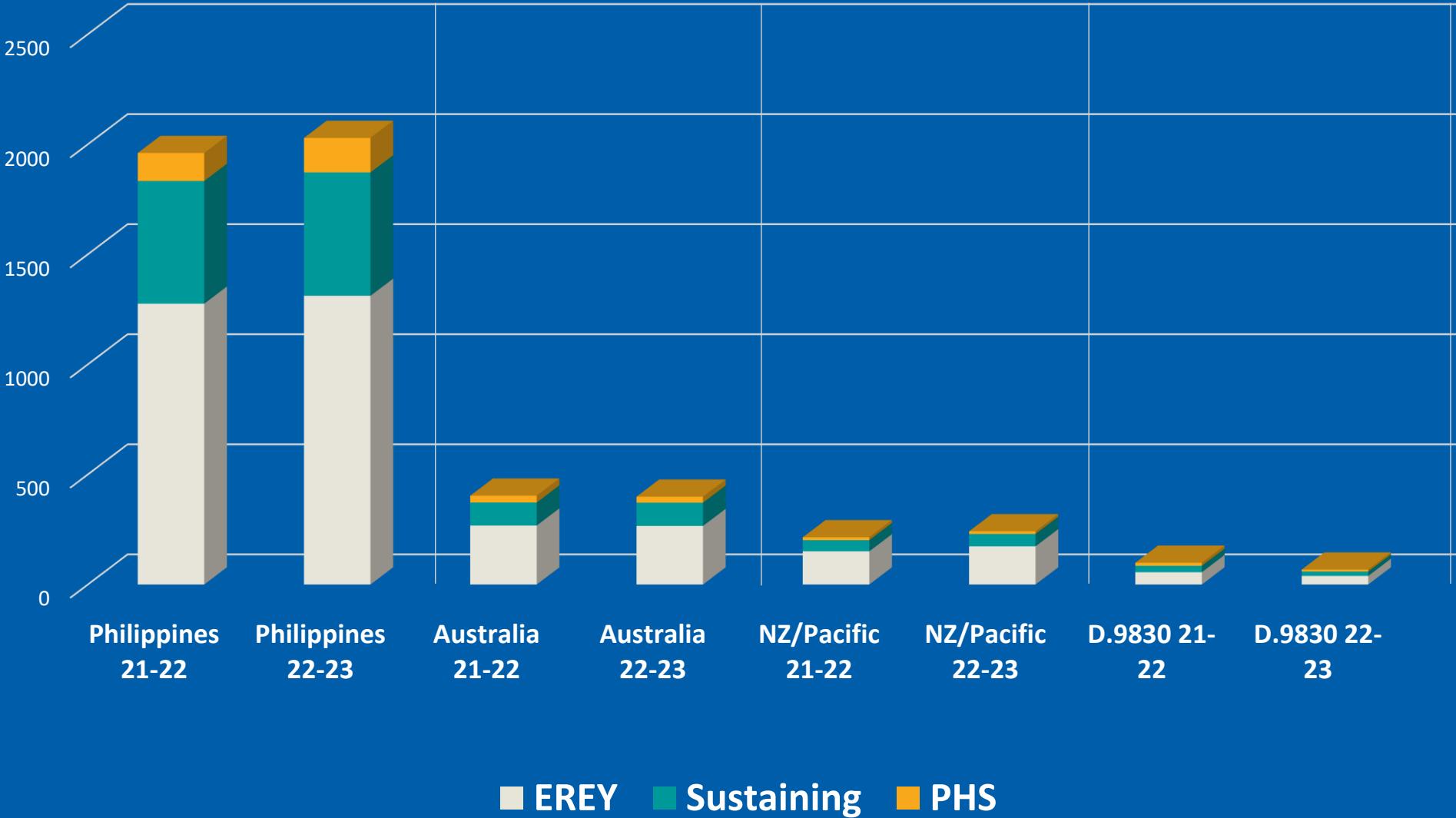
This year's giving vs other districts in *region*

Avg Contrib's / District, FY to end Jun 22 vs D.9830



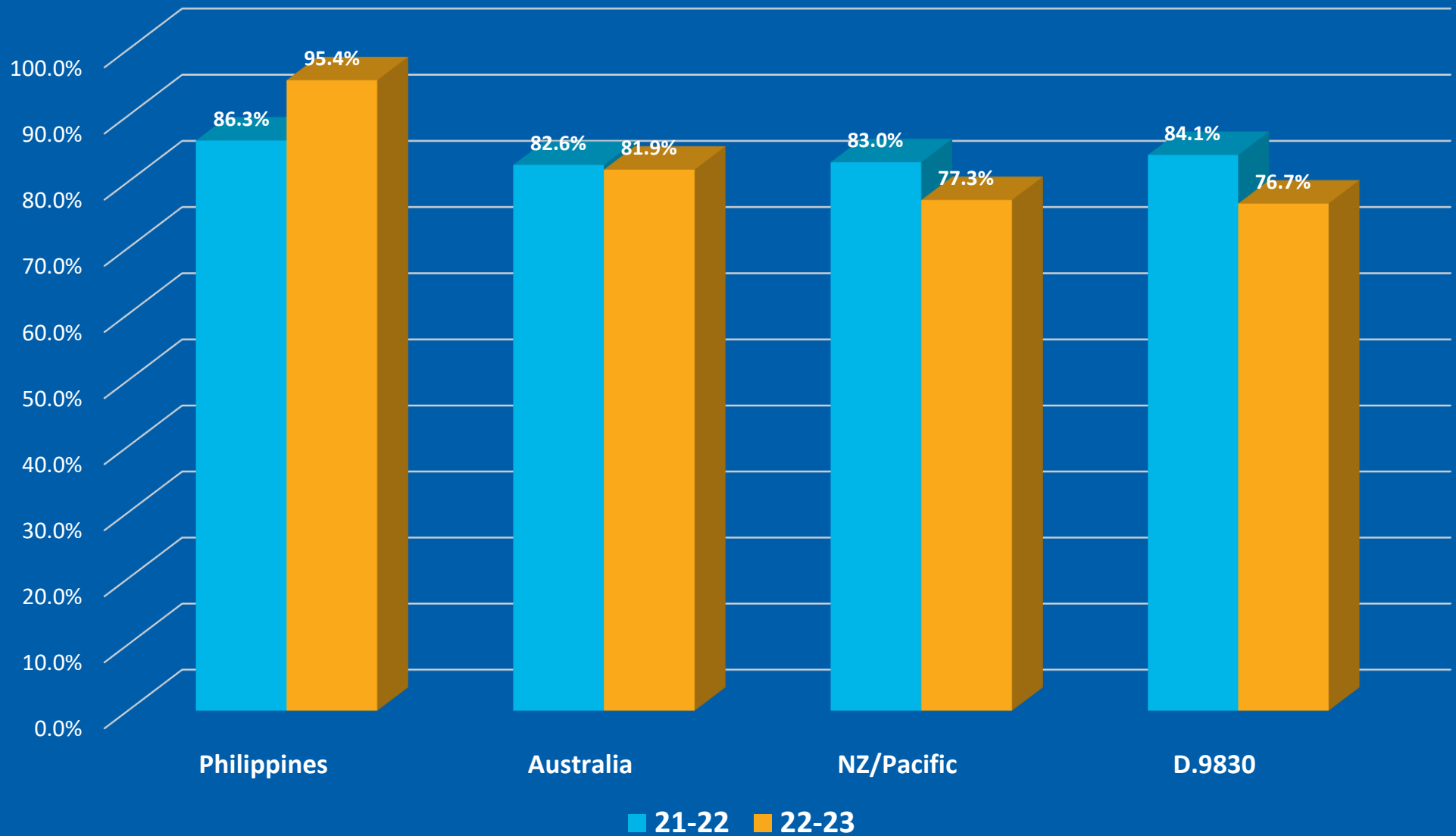
EREY, Sustaining Member & PHS participation vs region

Avg # of program donors per District vs D.9830 - FY 2022-23



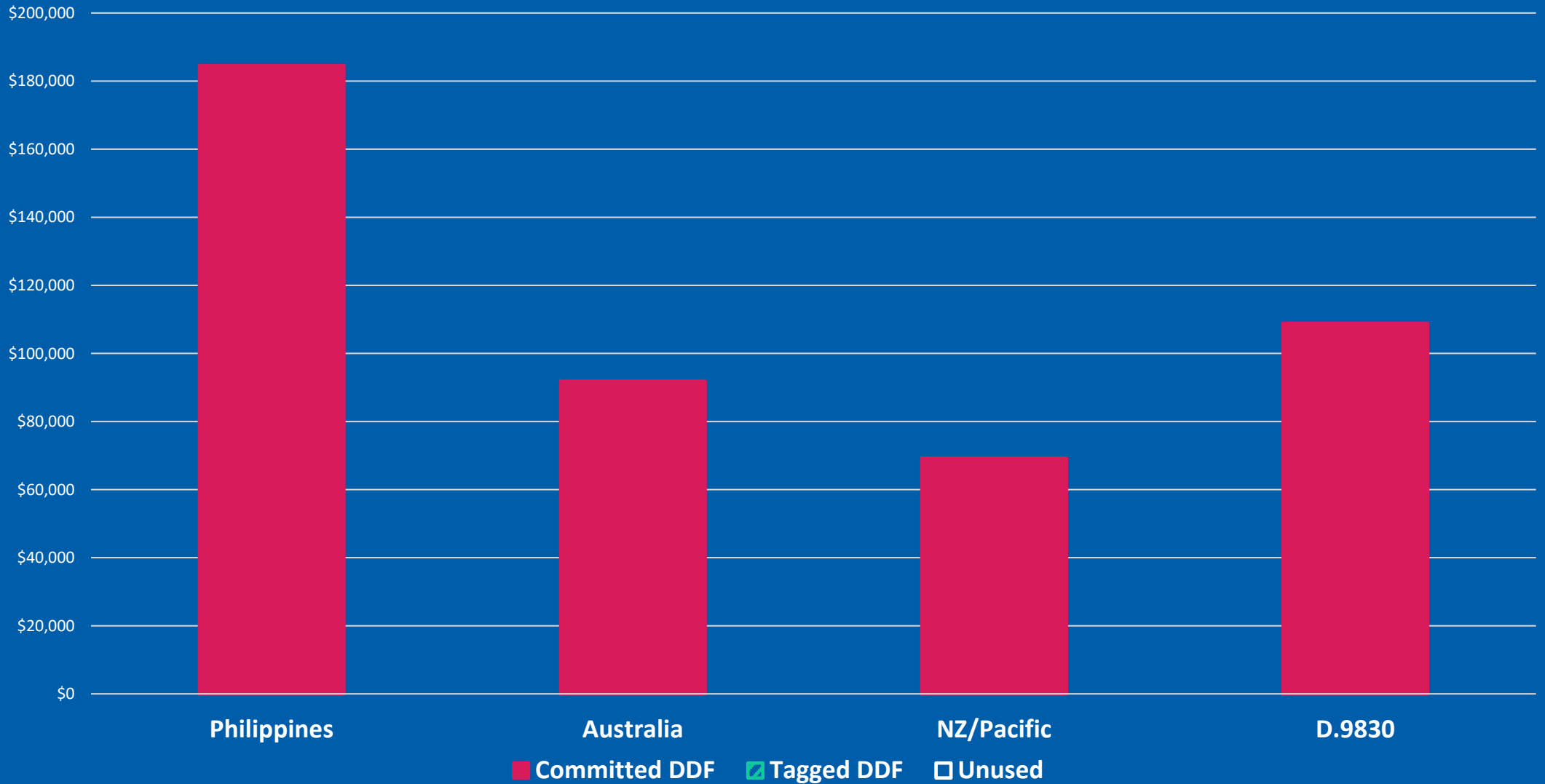
Club Support

Proportion of Clubs Giving to the Foundation - Financial Year



DDF Usage

DDF avg usage / District, by country at 17 Jul — vs D.9830



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Data

Numbers used in above charts

Contributions for twelve months to end of Jun from Rotary District 9830

	<u>18-19</u>	<u>19-20</u>	<u>20-21</u>	<u>21-22</u>	<u>22-23</u>
Annual Fund *	\$164,857	\$101,637	\$214,664	\$165,164	\$82,166
Polio Plus	\$15,229	\$20,199	\$20,032	\$30,556	\$29,293
Endowment Fund	\$0	\$699	\$0	\$0	\$6,993
Other	\$8,191	\$500	\$814	\$1,000	\$66,699
Total Contributions	\$188,278	\$123,035	\$235,509	\$196,720	\$185,151

Changes in YTD Contrib's:

Annual Fund * change	(38.3%)	111.2%	(23.1%)	(50.3%)
Polio Plus change	32.6%	(0.8%)	52.5%	(4.1%)
Endowment Fund change		(100.0%)		
Other change	(93.9%)	62.8%	22.9%	6569.9%
Total Contributions change	(34.7%)	91.4%	(16.5%)	(5.9%)

Avg Contrib's / District in Australia - Jun YTD

	<u>18-19</u>	<u>19-20</u>	<u>20-21</u>	<u>21-22</u>	<u>22-23</u>
Annual Fund *	\$194,712	\$161,761	\$195,323	\$186,436	\$182,065
Polio Plus	\$74,437	\$47,370	\$54,553	\$53,991	\$52,526
Endowment Fund	\$7,769	\$23,061	\$70,254	\$52,096	\$117,331
Other	\$9,450	\$29,886	\$29,813	\$35,311	\$81,733
	\$286,368	\$296,730	\$352,172	\$281,513	\$301,754
Annual Fund * change		(16.9%)	20.7%	(4.6%)	(2.3%)
Polio Plus change		(36.4%)	15.2%	(1.0%)	(2.7%)
Endowment Fund change		196.9%	204.6%	(25.8%)	125.2%
Other change		216.2%	(0.2%)	18.4%	131.5%

Avg Contrib's / District, FY to end Jun 22 vs D.9830

	Annual Fund	Polio Fund	Endowment	Other	Total
Philippines	\$407,742	\$85,762	\$117,331	\$81,733	\$692,568
Australia	\$182,065	\$52,526	\$27,043	\$40,119	\$301,754
NZ / Pacific	\$88,562	\$24,275	\$55	\$29,488	\$142,380
D.9830	\$82,166	\$29,293	\$6,993	\$66,699	\$185,151

Fund allocations:

Philippines	58.9%	12.4%	16.9%	11.8%	100.0%
Australia	60.3%	17.4%	9.0%	13.3%	100.0%
NZ / Pacific	62.2%	17.0%	0.0%	20.7%	100.0%
D.9830	44.4%	15.8%	3.8%	36.0%	100.0%

Avg # of program donors per District vs D.9830 - FY 2022-23

	EREY	Sustaining	PHS		EREY	Sustaining	PHS
Philippines 21-22	1276	558	127		49.9%	21.8%	5.0%
Philippines 22-23	1312	561	157		49.8%	21.3%	6.0%
Australia 21-22	268	105	31		18.4%	7.2%	2.1%
Australia 22-23	266	106	27		19.0%	7.5%	2.0%
NZ/Pacific 22-23	151	51	13		8.8%	2.9%	0.8%
NZ/Pacific 22-23	174	56	12		10.5%	3.4%	0.7%
D.9830 21-22	56	29	14		5.0%	2.6%	1.3%
D.9830 22-23	39	20	9		3.6%	1.9%	0.8%
D.9830 Change	-17	-9	-5		-1.4%	-0.7%	-0.4%

Proportion of Clubs Giving to the Foundation - Financial Year

	21-22	22-23
Philippines	86.3%	95.4%
Australia	82.6%	81.9%
NZ/Pacific	83.0%	77.3%
D.9830	84.1%	76.7%

Proportion of Clubs NOT Giving to the Foundation - Financial Year

	21-22	22-23
Philippines	13.7%	4.6%
Australia	17.4%	18.1%
NZ/Pacific	17.0%	22.7%
D.9830	15.9%	23.3%

DDF avg usage / District, by country at 17 Jul — vs D.9830

	Committed DDF	Tagged DDF	Unused	Committed %	Committed + Tagged %
Philippines	\$184,549	\$0	\$0	72.1%	72.1%
Australia	\$91,863	\$0	\$0	64.1%	64.1%
NZ/Pacific	\$69,248	\$0	\$0	55.8%	55.8%
D.9830	\$108,825	\$0	\$0	56.1%	56.1%

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Thank you!