

Instructions for Rotary Clubs Participating in the 1 Million Masks Nationwide Project

General

Rotary Clubs are as the primary means of acquiring donors (which can also be the clubs and their members), collecting and remitting the charitable donations and then receiving and distributing the masks to the beneficiaries (recipients) in their local area within NZ.

The Pacific Islands are a special case because of the logistics costs and difficulties. At this time, only masks for Fiji can be accommodated.

This is the first time Rotary has run a project like this so there are a number of new things to understand and processes involved.

Part of the process design is to ensure not only the orders are matched correctly to Donors and their clubs, but also that the project meets NZ tax law, particularly in regard to reliable, documented outcomes.

In this case, the outcome is the successful recorded delivery of masks to the intended beneficiaries.

So in this charitable programme, beneficiaries cannot be a Rotarian or a member of their immediate whanau, or a Rotary Club.

Lanaco as the partner in this programme has generously offered a special benefit to Clubs and Rotarians who participate in the programme, to purchase masks for themselves at the same price. This is completely separate and is set out in the related instruction document.

For each participating club, to run this project smoothly, you need to designate a Club Project Coordinator. This person will be the point of contact for any questions between club members, potential donors and the Project Team (Adrienne Murray, Venky Kannan, Andrew Mahoney).

Documents you need:

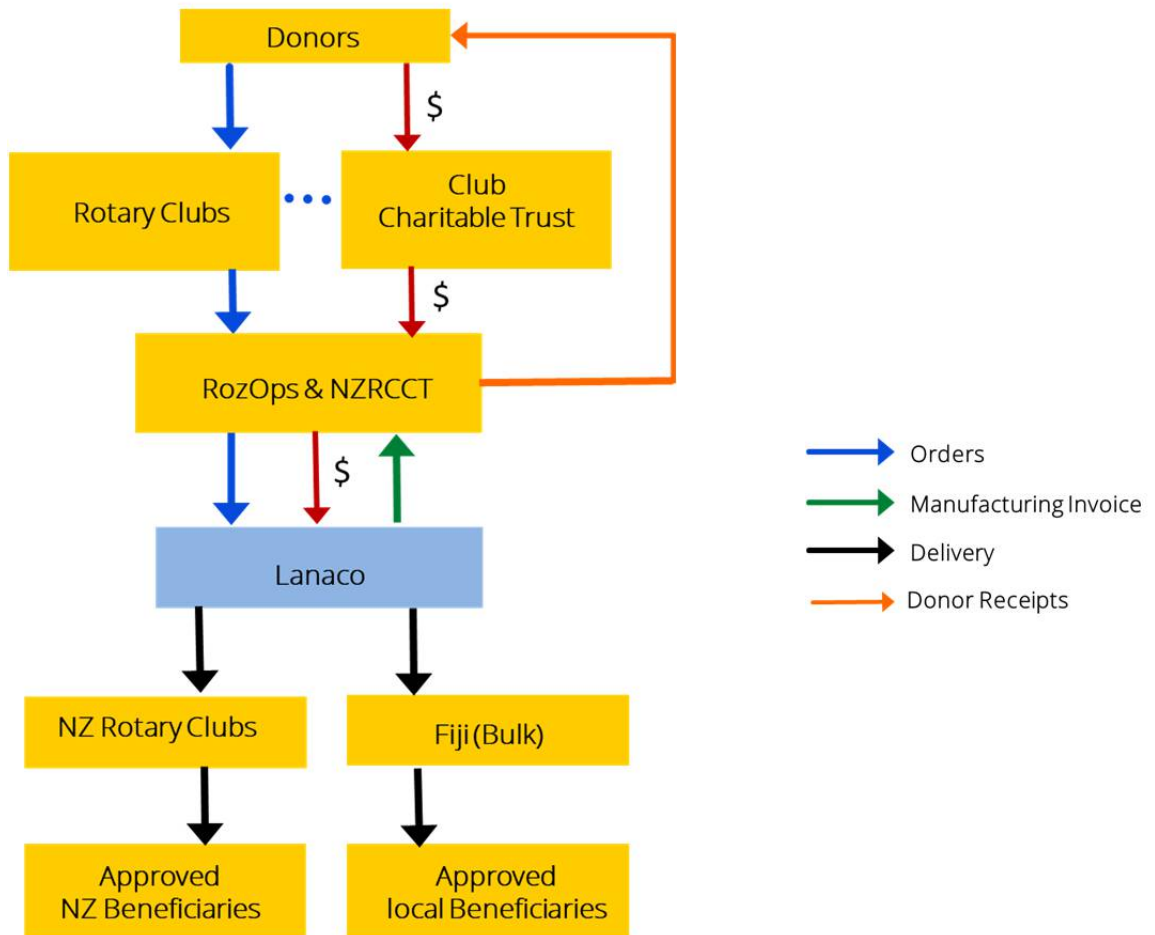
1. ***Instructions for Rotary Clubs participating in 1MM project.pdf***
This document you are reading
2. ***1MM – Public Document Nov 2021.pdf***
Donor sign-up - Each participating club customises this with its own details
3. ***Mask Pack Purchases.xlsx*** – Excel spreadsheet and “Receipt Acknowledgement”.
Used by every participating club to record donor, beneficiary organisation and other details for ordering.

4. **Acknowledgement form.**

Required to be signed by every beneficiary organisation receiving a donation of masks.

Download all the documents from here: rotary9940.org/

Overview – Donation Mechanism



Donation Mechanism

- **General Club Members’ Responsibilities:**
 - Find potential donors.
 - Collect donor’s money into the club’s charitable trust account and send donor’s details to the club project coordinator.
 - Propose beneficiaries
This is a bit complicated unfortunately BUT very important for legal purposes please follow the approval process in the appendix.
- **Club Project Coordinator’s Responsibilities:**
 - Assist the Project Team by managing all communications at a club’s level: between the club members, potential donors and the Project Team.

- Be the main point of contact so the Project Team can check in with the club as we progress through the project.
- Work with the Trust Treasurer to record donor's details and confirm that all money coming into the Trust is correctly allocated.
- Regularly check with the project team by email to get the OK for nominated beneficiaries so that they approved BEFORE you send the spreadsheet off each month.
- Keep track of orders and correctly submit them to RozOps on the spreadsheet at the required time.
- For donations of \$200+, If the donor wants their logo printed on the box, get the donor's logo graphic/information and email to Tony Moffat at Lanaco Tony.Moffat@lanaco.co.nz

Process to Follow:

- **Donors and donations collection and recording**

1. Fill in your club details in the document **"1MM – Public Document Nov 2021"**. This is a versatile document that brings together the "Why, What, How" of this project and can be printed or emailed to potential donors.
2. Follow through with the donations you are collecting. Make sure the money arrives in the Club Charitable Trust account.
3. Add them to your **"Mask Pack Purchases"** Excel spreadsheet to confirm that the money has been received. Each club needs to have their own Excel spreadsheet. Download the spreadsheet.

If the donation is \$200+ and if the donor wants their logo printed on the boxes, make sure to collect the donor organisation logo or name.

There are 2 steps here to ensure the correct order gets the correct logo

- a) On your order spreadsheet – mark the column "Company logo sent" with a YES
- b) Send this logo using the sample email shown in the Appendix to Tony Moffat at Lanaco: Tony.Moffat@lanaco.co.nz

- **Ordering and manufacture**

4. On or about the 20th of each month,
 - a) ensure all beneficiaries on your spreadsheet are approved BEFORE the next step
 - b) email the spreadsheet to RozOps at operations-manager@rotaryoceania.zone

c) at the same time send the collected donations to the NZRCCT account 06-0193-0905286-030 with the following details:

- Particulars: Club Name (short name – ignore “Rotary Club of”)
 - Code: Your District Number
 - Reference: Mask
5. RozOps will place a bulk manufacturing order on the 21st of each month to Lanaco based on the aggregate orders received from all clubs
 6. For orders for Fiji, Lanaco will accumulate packs of masks until they have 800 packs. This will then be shipped in one pallet to a nominated Fiji Rotary Club, and they will distribute it in their community.

- **Delivery and distribution to the beneficiaries**

7. For D9910 and D9920 orders, clubs can collect their orders directly from the Lanaco factory in Auckland.
8. The cost model that supports free delivery is based on bulk carton shipping of multiple orders from several clubs to a few (up to 3-4) pre-arranged distribution Rotary Clubs in each district.

The minimum shipping quantity to a rotary club distribution centre is 1 carton of 400 masks (40 boxes)

The project team will work with each District to arrange the receiving and distribution Rotary club. That receiving Rotary Club will act to break down the orders and arrange distribution to the relevant Rotary Clubs.

For District 9910, given the compact nature of D9910, we anticipate only 2 Rotary distribution club centres: One in Whangarei and one in North Auckland

For D9920, given its local nature and the ability for local pickup, we anticipate that most clubs can collect from Lanaco (Ellerslie).

9. Once the masks are delivered to your club, the Club Project Coordinator should inform the Project Team and confirm on their Excel spreadsheet that the correct number of packs for each beneficiary has been delivered.10. It is the Club’s responsibility to distribute the masks to the appropriate beneficiaries.

- **Acknowledgement**

10. For each delivery the club should ensure the beneficiary signs the acknowledgement form that you pre-prepare and take with you.

This is actually a legal step and provides proof the charitable purpose has been achieved, so it also protects the club as well.

When signed, it should be scanned and emailed to ROZops at: operations-manager@rotaryoceania.zone

The reason it has to go to ROZops is that ROZops issued the receipts and paid for the manufacturing. The acknowledgement form closes the loop providing the record that the purpose was achieved.

11. Process completed! Don't forget to take the opportunity, where appropriate, for PR for your club.

Appendix 1

Guidance choosing appropriate beneficiaries

This is important for legal reasons associated with being able to demonstrate the outcomes of the charitable activity and to avoid abuse of the programme objectives.

The word beneficiary is also important.

In this project, a successful outcome is the provision of a mask to a person (the beneficiary) who is deemed to need it, based on a charitable assessment.

In practical terms, an intermediate organisation is going to receive the bulk donated masks from Rotary and use their discretion to hand out masks to individuals.

So, from a Rotary Club point of view, a successful outcome is the delivery to the issuing organisation the required number of masks that were donated for it.

In your orders, we record the issuing or distribution organisation that will receive the bulk masks because that is far as we can go.

Examples of “appropriate” organisations are food banks, a church organisation, a Marae, a social services organisation or an intermediate or secondary school.

We do not recommend primary schools. The project is based on masks which are designed for adult face sizes. However, Lanaco has developed an equivalent smaller mask for children 8 years and older and this opens up the opportunity for intermediate schools.

By doing it this way, and getting approval, we demonstrate a considered validation process and avoid allegations of abuse of a charitable intention.

It also ensures that a donor – who may be a company – cannot ask that itself, or a “mate” be named as a beneficiary to hand out masks to their employees or “mates”.

This also explains why Rotarians and their immediate whanau and Rotary Clubs cannot be a beneficiary (in this process).

Validating proposed beneficiaries (ie distributing organisations)

The approval process gives you the opportunity to go back and talk to a donor if there is an issue BEFORE you send off the donations to ROZops.

Pacific Island beneficiaries

Donors can only select Fiji at this time due to logistical and freight cost issues. Please ensure donors understand this.

However; if the donor or your club is able to bear the cost of freight to another of the Pacific Islands we can support your order.

As you get donors coming in, if they nominate a beneficiary, then you should check with Adrienne immediately. If donors give no preference, then the club can either choose one from an already approved list, or choose one itself and if needed, get approval.

Email Adrienne Murray at: amconsultingnz@gmail.com or mob: 027 439 6418

Appendix 2

Sample email with donor logo

Notes for Rotary Club: This email ensures the company logo gets linked to the correct order and then shipped to the correct club for delivery.

Send to: Tony.Moffat@lanaco.co.nz

Subject: 1MM project - company logo for printing

Attached a company logo for the following donation

Ordering Rotary Club:

Rotary District:

Donor Name:

Order Qty (packs):