

## ROTARY INTERNATIONAL

October 2010

### 2011-12 ROTARY FOUNDATION GRANT PARTICIPATION THROUGH *SHARE* FOR FUTURE VISION PILOT DISTRICTS



Dear 2011-12 District Governor:

*SHARE* allows districts to choose how they wish to participate in the grantmaking programs of The Rotary Foundation using their District Designated Funds (DDF). This *SHARE* kit is to assist pilot districts in planning how funds will be spent during the 2011-12 Rotary year.

In accordance with *The Rotary Foundation Code of Policy*, the District Rotary Foundation Committee (DRFC)--comprised of the district governor, the DRFC chair and the PolioPlus, fundraising, and grants subcommittee chairs--is responsible for *SHARE* planning at the district level. To assist in your district's planning, the following are enclosed:

1. ***SHARE* System Report** – showing 50% of APF contributions from 2008-09
2. **Endowed Fund Update** – only for districts with endowed funds restricted to *SHARE*
3. ***SHARE* kit instructions** – guidelines for using the enclosed materials
4. ***SHARE* kit receipt form** – please sign and return by 1 December 2010
5. **Rotary Foundation Fund Pools donation form** – applies to all districts
6. ***SHARE* DDF options list** – exclusively for pilot districts

Your Future Vision district and global grants coordinators are helpful resources to assist you in your *SHARE* planning for this second year of the pilot. Both coordinators, as well as your Regional Rotary Foundation Coordinator, are copied on these materials. We encourage you to work with them to take full advantage of the grantmaking opportunities available.

Sincerely,

Steve Lyons  
*SHARE* System Senior Coordinator  
Phone: 847-866-3362, Fax: 847-556-2129 or 847-424-5381  
E-mail: [steve.lyons@rotary.org](mailto:steve.lyons@rotary.org)

cc: 2010-11 District Governor  
District Rotary Foundation Committee Chair  
Regional Rotary Foundation Coordinator  
District Grants Senior Coordinator, The Rotary Foundation of Rotary International  
Global Grants Senior Coordinator, The Rotary Foundation of Rotary International

One Rotary Center  
1560 Sherman Avenue  
Evanston, Illinois  
60201-3698 USA  
tel 847.866.3000  
fax 847.328.8554  
[www.rotary.org](http://www.rotary.org)

## 2011-12 *SHARE* Kit

### Instructions

#### **HOW to use the *SHARE* Kit...**

This kit is a tool to help districts plan their DDF spending. At the heart of the kit are the *SHARE* System Report\*, which shows how much DDF will be available for projects taking place during 2011-12, and the *SHARE* DDF Options List, which lists the Trustee-approved options for spending DDF. Information about applying for your 2011-12 District Grant is mailed separately from Future Vision Pilot Operations.

#### **WHAT to return to the Foundation...**

There are two items to return to the Foundation: the receipt form (required) and the donation form (optional)^. DDF expenditures are recorded when grant applications are approved. Districts are expected to track the use of their DDF and can check their current “account balance” by contacting the *SHARE* coordinator for a *SHARE* Transaction Detail Report.

#### **WHEN to check your calendar...**

October 2010	<input type="checkbox"/> Districts receive 2011-12 <i>SHARE</i> kit.
December 2010	<input type="checkbox"/> Districts return the <i>SHARE</i> kit receipt form, signed by the 2011-12 District Governor.
August 2011	<input type="checkbox"/> Districts receive updated <i>SHARE</i> System Report with 2010-11 carry forward amount.
June 2012	<input type="checkbox"/> Deadline for submitting DDF donation form.

**Questions or concerns about the *SHARE* System Report or any of the contents of the *SHARE* kit may be directed to:**

Steve Lyons  
*SHARE* System Senior Coordinator  
Phone: 847-866-3362, Fax: 847-556-2129 or 847-424-5381  
E-mail: [steve.lyons@rotary.org](mailto:steve.lyons@rotary.org)

**\* We will assume that you are in agreement with the 2011-12 DDF balance on the *SHARE* System Report unless you notify us immediately of any discrepancy.**

**^ Districts may not withdraw DDF donations.**

**FUTURE VISION PILOT DISTRICT \_\_\_\_\_**

**2011-12 *SHARE* KIT**

**RECEIPT FORM**

I, the undersigned, attest that I have received a copy of the 2010-11 *SHARE* kit.

**Please Print:**

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**2011-12 District Governor**

**Please Sign:**

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**2011-12 District Governor**

**Date**

**Please sign and return this form, via fax or mail, by 1 December 2010 to:**

**Steve Lyons, *SHARE* System Senior Coordinator  
Fax: (847) 556-2129 or (847) 424-5381  
The Rotary Foundation of Rotary International  
1560 Sherman Avenue  
Evanston, IL 60201**

Please note that if secretariat administrative reclasses of a material nature are made to your district's 2008-09 APF-Share contribution amounts, the DDF balance in the *SHARE* System will be affected accordingly.

## Rotary Foundation Fund Pools Donation Form for Rotary Year 2011-12

District \_\_\_\_\_

OPTION	Amount
<p><b>PolioPlus Fund - Rotary's US\$200 Million Challenge</b>                      The Fund supports the most essential components of polio eradication activities such as National Immunization Days, including house-to-house vaccination campaigns in priority countries, and disease surveillance. For more information, contact Clare Monroe, 847-424-5244; Fax: 847-328-5260; email: clare.monroe@rotary.org  <i><b>The Rotary Foundation received a US\$355 million grant from the Bill and Melinda Gates Foundation. During 2008-09, 2009-10, 2010-11 and 2011-12 Rotary years, we are challenged to raise US\$200 million to match the Gates Foundation's gift. Your district's 2011-12 DDF donation to PolioPlus will be counted towards matching the Gates Foundation Challenge Grant, and every US\$1.00 of DDF donated will be matched with US\$.50 from the World Fund (up to US\$6 million DDF as authorized by the Trustees).</b></i></p>	US\$
<p><b>Rotary Peace Centers - Rotary Peace Fellowships</b>                      DDF supports the pool of funds that provides up to 50 Rotary World Peace Fellowships for master's degree study and up to 50 Rotary World Peace Fellowships for professional development certificate study, offered annually on a world-competitive basis for study at the six Rotary Centers. Rotary World Peace Fellows obtain a master's degree in international relations, peace studies, conflict resolution, and related areas or a professional development certificate in peace and conflict studies. For additional program details, contact Brad Lauman, 847-866-3323; Fax: 847-556-2141; email: brad.lauman@rotary.org  <i><b>Is this donation intended as part of a Rotary Centers Peacebuilder Commitment? (\$25,000 donation per year or \$50,000 donation every other year)</b></i>  <input type="checkbox"/> Yes    <input type="checkbox"/> No</p>	US\$
<p><b>Rotary Peace Centers - Permanent Fund</b>                      If this donation is intended to be placed within the Permanent Fund, please indicate the name of the fund or the gift ID.                      Name of Fund _____ Tracked Gift ID _____</p>	US\$
<b>FOR DONATION OPTIONS NOT LISTED ABOVE, CONTACT THE SHARE COORDINATOR.</b>	

**Authorizing Signatures:**

\_\_\_\_\_

2011-12 District Governor Date District

\_\_\_\_\_

Please Print Name

\_\_\_\_\_

District Rotary Foundation Committee Chair Date District

\_\_\_\_\_

Please Print Name

Return by fax, email, or mail to:

Steve Lyons, *SHARE* System Sr. Coordinator  
 The Rotary Foundation of Rotary International  
 1560 Sherman Avenue, Evanston, IL 60201  
 Fax: (847) 556-2129 or (847) 424-5381  
 steve.lyons@rotary.org

# Future Vision Pilot

## **SHARE DDF Options for 2011-12\*\***

- **Rotary Foundation Global Grants** (variable DDF amounts, eligible for Foundation match): Rotary Foundation Global Grants support large activities that relate to one or more of the six areas of focus and have a long-term impact. Clubs and districts can either create their own global grant-funded activities or sponsor packaged global grants that are developed by The Rotary Foundation in cooperation with its strategic partners.
  - Global grants may fund scholarships, vocational training or humanitarian activities, or a combination of these activities.
  - Club- and district-developed global grants may be carried out only between two pilot districts and must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.
  - Club- and district-developed global grants may be funded through a combination of DDF and cash and will receive a Foundation match.
    - DDF contributions will be matched 100%
    - Cash contributions will be matched 50%
    - The Foundation will match funding with a minimum award amount of US\$15,000 and a maximum amount of US\$200,000
  - Both grant sponsors are encouraged to contribute toward the financing of a grant in which they are collaborating
  - Any unused DDF from the previous Rotary year will be rolled over to the following year's DDF account. Rollover may be applied to Rotary Foundation Global Grants, as well a donation to any of the options outlined below.
- **Rotary Foundation District Grants** (variable DDF amounts, fully district funded): Rotary Foundation District Grants are intended to be utilized for activities that support the Foundation's mission and are relatively short-term in nature. They may be either local or international and are not required to support the selected areas of focus.
  - District grants may fund a variety of initiatives, including, but not limited to, scholarships, vocational training, or humanitarian activities
  - District grants may be used within pilot or nonpilot districts and must adhere to the eligibility requirements set forth in the terms and conditions for Rotary Foundation grants.
  - Each district may request up to 50% of its DDF, generated from a district's Annual Programs Fund giving from three years prior, including Permanent Fund SHARE earnings, in an annual block grant.
  - Districts are responsible for administering the activities undertaken with these funds which are dispersed at their discretion.
  - Districts must be qualified by the Foundation to receive district grant funds. Clubs do not need to be qualified by the district to receive district grant funds.

## Donations

- **PolioPlus Fund:** An opportunity to donate DDF to PolioPlus, Rotary's priority program, to support the most essential components of polio eradication activities such as National Immunization Days, including house-to-house vaccination campaigns in priority countries, and disease surveillance. The Rotary Foundation received a US\$355 million grant from the Bill and Melinda Gates Foundation. During the 2008-09, 2009-10, 2010-11 and 2011-12 Rotary years, we are challenged to raise US\$200 million to match the Gates Foundation's gift. A district's 2011-12 DDF donation to PolioPlus will be counted towards matching the Gates Foundation Challenge Grant. The Trustees have agreed to match the first US\$6 million DDF donated with US\$0.50 from the World Fund for each US\$1.00 of DDF.
- **District-to-District:** A contribution of DDF is made to a Rotary pilot or nonpilot district of your choice. The receiving district may use the donated DDF to fund any *SHARE* option in which it is eligible to participate.
- **World Fund:** The World Fund is vital to the continuation of the Foundation's grants and programs. The Trustees use the World Fund to provide the Foundation's matching portion to Rotary Foundation Global Grants to pilot districts, as well as offer programs such as Group Study Exchange, the Foundation's matching portion of Matching Grants to nonpilot districts.
- **Permanent Fund:** The Permanent Fund ensures The Rotary Foundation's ability to meet the urgent needs of the future through an endowment. Spending of investment earnings from DDF contributions to the Permanent Fund will be used for the World Fund.
- **Rotary Centers for International Studies in peace and conflict resolution program:** Donations support the pool of funds that provides up to 50 Rotary World Peace Fellowships for master's degree study and up to 50 Rotary World Peace Fellowships for professional development certificate study, offered annually on a world-competitive basis for study at the seven Rotary Centers. Rotary World Peace Fellows obtain a master's degree in international relations, peace studies, conflict resolution, and related areas or a professional development certificate in peace and conflict studies.

**\*\* This list of Trustee-approved *SHARE* DDF spending options pertains only to pilot districts that are part of the Future Vision Plan.**

**For further information regarding the Rotary Foundation District and Global Grants, please consult the Rotary Web site at:  
<http://www.rotary.org/en/fvdistrict>**

**or contact your Future Vision Coordinators, using the following contact list:  
[http://www.rotary.org/RIdocuments/en\\_pdf/fv\\_staff\\_contacts\\_en.pdf](http://www.rotary.org/RIdocuments/en_pdf/fv_staff_contacts_en.pdf).**