

The Rotary Foundation

# Quick Reference Guide

2007-08

The Rotary Foundation of Rotary International





# Contents

PolioPlus.....	1
PolioPlus Grants	1
PolioPlus Partners Grants	1
PolioPlus Resource Materials	2
Humanitarian Grants Program.....	2
Health, Hunger and Humanity (3-H) Grants	3
Matching Grants	4
District Simplified Grants	5
Volunteer Service Grants	6
Humanitarian Grants Program Resource Materials	8
Educational Programs .....	8
Ambassadorial Scholarships	8
Rotary Grants for University Teachers	9
Rotary Centers for International Studies	10
Rotary Peace and Conflict Studies	11
Group Study Exchange	12
Educational Programs Resource Materials	14
Rotary Foundation Alumni .....	15
Foundation Funding.....	15
Annual Programs Fund Contributions	15
Permanent Fund Gifts	16
Where do I send my contribution?	17
Contribution Recognition	18
Fund Development Resource Materials	18
<i>SHARE</i> System.....	19
The <i>SHARE</i> 3-Year Cycle	19
General Foundation Resources .....	20
New Contact Center	20
District Rotary Foundation Resources.....	20

## NOTES AND ABBREVIATIONS

Cost references are provided in U.S. dollars.

TRF (The Rotary Foundation)

DDF (District Designated Fund, also known as *SHARE* funds)

# PolioPlus

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## **POLIOPLUS GRANTS**

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PURPOSE	Support global polio eradication efforts in polio endemic, importation, and high-risk countries, which include conducting National Immunization Days, monitoring poliovirus transmission, and other activities.
Funding	PolioPlus grants are funded by the general PolioPlus Fund and District Designated Fund (DDF) allocations.
Application	Proposals are primarily submitted by a major partner agency, such as the World Health Organization or UNICEF or national PolioPlus committee chairs (listed in the <i>Official Directory</i> [007-EN]).
DECISION	Trustees approve PolioPlus grants at regularly scheduled meetings.

E-mail questions to [polioplus@rotary.org](mailto:polioplus@rotary.org) or call 847-866-3305.

## **POLIOPLUS PARTNERS GRANTS**

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PURPOSE	Support urgent social mobilization and surveillance projects submitted by fellow Rotarians in polio endemic, importation, and high-risk countries.
FUNDING	PolioPlus Partners projects are funded by cash contributions and DDF allocations. The Trustees of The Rotary Foundation will match \$0.50 for every \$1.00 of cash contributed to PolioPlus Partners.
APPLICATION	Grant applications are accepted only from national PolioPlus committee chairs in priority countries. Contact the PolioPlus Partners program staff for information on current priority countries and to obtain the Open Projects List.
DECISION	Grants are approved on a rolling basis.

E-mail questions to [polioplus@rotary.org](mailto:polioplus@rotary.org) or call 847-866-3255.

## **POLIOPLUS RESOURCE MATERIALS** .....

*PolioPlus: The Race to Reach the Last Child* (316-EN). A four-minute video highlights Rotary's involvement in the eradication of polio.

*PolioPlus: A Gift to the Children of the World* (317-MU). An eleven-minute DVD highlights Rotary's latest work in the march toward polio eradication.

*PolioPlus Brochure* (323-EN). Update on the polio eradication effort, the contributions of Rotary and its polio eradication partners, and the remaining challenges to a polio-free world.

*PolioPlus Poster* (327-EN). Color photograph of a child receiving oral polio vaccine. Features an inspirational quote about PolioPlus from UN Secretary-General Kofi Annan.

*Conquering Polio* (329-EN). Book written by International PolioPlus Committee Member and Past RI General Secretary Herbert A. Pigman that provides a brief history of PolioPlus, Rotary's role in a global program to eradicate the world's greatest crippling disease. Includes color photos.

*PolioPlus Partners Brochure* (344-EN). Information on the PolioPlus Partners program, which enables individuals, clubs, and districts to make a direct impact on polio eradication efforts by supporting projects listed by Rotarians in polio eradication priority countries.

## **Humanitarian Grants Program**

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Humanitarian Grants support clubs and districts as they undertake humanitarian service projects. All grants of The Rotary Foundation

- ▶ Involve the active participation of Rotarians
- ▶ Address humanitarian needs

Funds cannot be used for

- ▶ The purchase of land or buildings
- ▶ Construction or renovation
- ▶ Salaries, stipends, or honoraria for individuals working for a cooperating organization or beneficiary
- ▶ Postsecondary education activities, research, or personal or professional development

## HEALTH, HUNGER AND HUMANITY (3-H) GRANTS

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PURPOSE	Fund long-term (2-4 years) integrated international development projects to improve health, alleviate hunger, or enhance development through self-help activities
FUNDING	<ul style="list-style-type: none"><li>▶ TRF provides \$100,000-\$300,000.</li><li>▶ Sponsor must provide at least 10 percent of award.</li></ul>
APPLICATION	<ul style="list-style-type: none"><li>▶ <i>Step 1:</i> Submit preliminary proposal letter to TRF for review.</li><li>▶ <i>Step 2:</i> If the proposal is eligible, the sponsors will be invited to submit a 3-H Grant Application to TRF.</li></ul>
DEADLINES	<ul style="list-style-type: none"><li>▶ Preliminary proposal: 31 March</li><li>▶ 3-H Grant Application: 1 August</li></ul>
CRITERIA FOR SUCCESS	<p>Project must</p> <ul style="list-style-type: none"><li>▶ Be sponsored by clubs/districts that have successfully worked together as primary sponsors of a Matching Grant project within five years of submitting their proposal.</li><li>▶ Use an integrative approach</li><li>▶ Benefit a large number of people</li><li>▶ Be of a self-help nature</li><li>▶ Involve a significant number of Rotarians in at least two countries</li><li>▶ Be clearly identified as Rotary-supported</li><li>▶ Be initiated, controlled, and implemented by Rotarians</li><li>▶ Be self-sustaining after grant funding has ended</li></ul>
DECISION	Trustees review applications in April annually.
REPORTING	Both international and host partners must work together to prepare and submit progress and final reports. Progress reports are due every 12 months for the life of the project. A final report is due two months after project completion.

## MATCHING GRANTS

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PURPOSE	Assist in funding international humanitarian service projects in cooperation with Rotarians in another country
FUNDING	TRF provides a 1:1 match of DDF and a 0.5:1 match of sponsor cash contributions. TRF provides grants of \$5,000 to \$150,000
APPLICATION	Submit a <i>Matching Grant Application</i> (141-EN).
DEADLINES	Applications are accepted from 1 July to 31 March. Applications requesting more than \$25,000 are considered twice a year by the full Board of Trustees and should be submitted no later than 1 August for consideration at the October/November Trustee meeting and no later than 1 January for consideration at the March/April Trustee meeting.
CRITERIA FOR SUCCESS	<ul style="list-style-type: none"><li>▶ Projects must be new (not already in progress) and feature the active, personal participation of Rotarians in both the international and host countries.</li><li>▶ Grants must address a humanitarian condition that benefits a community in need.</li><li>▶ All grants must adhere to the grant policies that govern all grant programs. See <a href="http://www.rotary.org/foundation/programs.html">www.rotary.org/foundation/programs.html</a> or request a copy from Humanitarian Grants Program staff.</li></ul> <p>For <i>Matching Grants</i> \$5,000-\$25,000, partner Rotary clubs and districts are required to</p> <ul style="list-style-type: none"><li>▶ Maintain communication and dialogue for the life of the project</li><li>▶ Establish a committee of at least three Rotarians</li><li>▶ Jointly assess community needs, plan the project, and provide a paragraph outlining participation</li><li>▶ Visit the project site on an as-needed basis. The international partner may participate by sharing information via correspondence or by visiting the project site.</li></ul> <p>For <i>Competitive Matching Grants</i> \$25,001-\$150,000, partner Rotary clubs and districts are required to</p> <ul style="list-style-type: none"><li>▶ Meet the requirements of Matching Grants \$5,000-\$25,000</li><li>▶ Conduct a community needs assessment</li></ul>

- ▶ Provide information indicating how the project is viable and will be maintained
- ▶ Provide evidence of community involvement and ownership

Host partners are limited to five open Matching Grant projects at any given time.

DECISION Applications will be approved from 1 August through 15 May.

REPORTING Both international and host partners must work together to prepare and submit progress and final reports. Progress reports are due every 12 months for the life of the project. A final report is due two months after project completion.

## **DISTRICT SIMPLIFIED GRANTS (DSG)**

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PURPOSE Support the service activities or humanitarian endeavors of districts

FUNDING DDF: Maximum of 20 percent of DDF which is based on 50 percent of giving from three years prior

APPLICATION Districts may submit one *District Simplified Grant Request* (153-EN) per year.

DEADLINE Requests will be accepted 1 July to 31 March. Requests should be submitted in the Rotary year prior to the year in which funds are available.

CRITERIA FOR SUCCESS ▶ Adhere to the grant policies that govern all grant programs. See [www.rotary.org/foundation/programs.html](http://www.rotary.org/foundation/programs.html) or request a copy from Humanitarian Grants Program staff.

▶ Respect the wishes of the receiving community and understand and appreciate its tradition and culture.

District activities should include:

▶ Assessment of community needs and development of a project plan

▶ Establishment of a committee of at least three Rotarians to oversee the expenditure of funds

▶ Oversight of grant funds

▶ Involvement in project implementation

	<ul style="list-style-type: none"> <li>▶ Provision of evidence of community involvement and ownership</li> <li>▶ Organization of meetings with local service providers, local officials, and/or recipients</li> <li>▶ Promotion of projects in the local media</li> </ul>
DECISION	Complete requests will be approved from 1 August through 15 May.
REPORTING	The district must prepare and submit progress and final reports. Progress reports are due every 12 months for the life of the project. A final report is due two months after project completion. A district may not have more than two paid open grants at a given time. A district must expend and report on at least 50 percent of one DSG before payment will be made on another DSG.

## **VOLUNTEER SERVICE GRANTS**

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PURPOSE	Subsidize travel of qualified Rotarians and their spouses to plan a project or provide direct service in Rotary countries
FUNDING	TRF provides a flat grant award: \$3,000 for an individual traveler and \$6,000 for groups up to five people.
APPLICATION	Submit a <i>Volunteer Service Grant Application</i> (136-EN).
DEADLINE	Applications are accepted on a rolling basis throughout the year. Applications must be submitted to TRF at least three months prior to departure and approved at least two months prior to departure.
CRITERIA FOR SUCCESS	<p>Recipients of Volunteer Service Grants must comply with TRF policies regarding travel insurance.</p> <p>Qualification of travelers is based on the following:</p> <ol style="list-style-type: none"> <li>1. There is a defined need within the community for the project, as identified by the host partner.</li> <li>2. The need can be met by the skills and experiences of the traveler(s).</li> <li>3. The skills and experiences to meet the community need are not available locally.</li> </ol>

Members of the host partner club or district are expected to:

1. Organize meeting(s) with local service providers and/or local officials for visiting Rotarians
2. Offer accommodations in the homes of local Rotarians. If this is not possible, arrange hotel accommodations for visiting Rotarians.
3. Assist with local transportation
4. Visit the project site and/or volunteer at the project site
5. Invite visiting Rotarian(s) to speak to local Rotary clubs

Members of the international partner club or district are expected to:

1. Establish communication with members of the host partner club or district
2. Publicize the volunteer service/planning mission in the media
3. Organize presentations about the grant

Volunteers must be on-site a minimum of 5 days and a maximum of 60 days (not including travel days). If the volunteer wishes to stay at the project site for more than 60 days, all expenses incurred become the responsibility of the volunteer.

Travel arrangements through Rotary International Travel Service (RITS) must be made immediately after notification of approval and no less than 45 days before departure. If this is not adhered to, the travel dates will need to be changed or the grant may be subject to cancellation.

Applications are approved on a rolling basis.

Both international and host partners must work together to prepare and submit reports. The host partner must submit a Post-Service Evaluation and the international partner must submit a final report with two months of the project's completion.

DECISION  
REPORTING

## HUMANITARIAN GRANTS PROGRAM RESOURCE MATERIALS .....

*The Guide to Matching Grants* (144-EN). Handbook offering comprehensive guidelines on applying for Matching Grants and carrying out these projects.

*Best Practices for Managing Your District Simplified Grant* (156-EN). Handbook offering best practices and tips for managing a District Simplified Grant.

*The Guide to Volunteer Service Grants* (157-EN). Handbook offering comprehensive guidelines on applying for Volunteer Service Grants and carrying out these projects.

*The Guide to Health, Hunger and Humanity (3-H) Grants* (158-EN). Handbook offering comprehensive guidelines on applying for 3-H Grants and carrying out these projects.

## Educational Programs

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### AMBASSADORIAL SCHOLARSHIPS

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PURPOSE	Provide scholarships to students who serve abroad as ambassadors of good will to improve international understanding
FUNDING	<p>SHARE/DDF option costs:</p> <ul style="list-style-type: none"><li>▶ <i>Academic-Year Scholarships</i> for one academic year of studies abroad. Starting in 2008-09: flat grant of \$23,000 to defray costs associated with transportation, fees, room and board, and other miscellaneous expenses.</li><li>▶ <i>Multi-Year Scholarships</i> for two years of degree-oriented studies abroad. Starting in 2008-09: \$11,500-a-year flat grant.</li><li>▶ <i>Cultural Scholarships</i> for either three or six months of intensive language training and cultural immersion abroad while living with a home-stay family. Starting in 2008-09: flat grant of \$10,000 for 3 months and of \$19,000 for 6 months of intensive language training, cultural immersion, living with a host family, and transportation.</li></ul>

- ▶ *Scholarships Fund Pool for Low-Income Countries:* Offers Ambassadorial Scholarships to individuals from low-income countries on a world-competitive basis. Each low-income district and low-income country within a district may submit one candidate to the competition for the up-to-32 scholarships awarded annually.

APPLICATION	Districts submit <i>Ambassadorial Scholarships Application</i> (139-EN).
DEADLINES	Applications from districts due at TRF 1 October. Check with district scholarships subcommittee chair for district deadline.
CRITERIA FOR SUCCESS	Applicants must have completed two years of college or university course work, or must have a secondary school education and have been employed in a recognized vocation for at least two years, and must wish to serve as an ambassador of goodwill. See RI Web site for complete criteria.
DECISION	Trustee-approved applicants receive confirmation by 15 December.
CANNOT BE USED FOR	Rotarians; honorary Rotarians; employees of a club, district, or other Rotary entity, including Rotary International; spouses, lineal descendants (child or grandchild by blood, legal adoption, or marriage without adoption), or ancestors (parent or grandparent by blood) of any living person in the foregoing categories; spouses of lineal descendants

E-mail questions to [contact.center@rotary.org](mailto:contact.center@rotary.org) or call 866-9ROTARY.

## **ROTARY GRANTS FOR UNIVERSITY TEACHERS**

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PURPOSE	Provide grants to higher education faculty to teach at colleges/universities in low-income countries. Builds understanding and development while strengthening higher education in low-income countries.
FUNDING	DDF: \$12,500 for 3-5 months or \$22,500 for 6-10 months of service
APPLICATION	Districts submit <i>Rotary Grants for University Teachers Application</i> (193-EN).

DEADLINES	Applications from districts due at TRF 1 October. Check with district scholarships subcommittee chair for district deadline.
CRITERIA FOR SUCCESS	Applicant's home and prospective host countries must have at least one Rotary club. Also, applicant must <ul style="list-style-type: none"> <li>▶ Hold (or have held, if retired) a college or university teaching appointment for three or more years (no specific rank)</li> <li>▶ Teach an academic field of practical use to the host country and demonstrate proficiency in the language of the host country. See Web site for complete criteria.</li> <li>▶ Applicants may be Rotarians or non-Rotarians.</li> </ul>
DECISION	15 December for teaching assignments beginning the next Rotary year

E-mail questions to [contact.center@rotary.org](mailto:contact.center@rotary.org) or call 866-9ROTARY.

## **ROTARY CENTERS FOR INTERNATIONAL STUDIES IN PEACE AND CONFLICT RESOLUTION**

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PURPOSE	Provide Rotary World Peace Fellowships to individuals pursuing a one- to two-year master's degree or certificate program in international relations, peace, conflict resolution, and related subjects at one of the seven Rotary Centers for International Studies in peace and conflict resolution
FUNDING	Transportation, tuition, fees, room and board, and other limited expenses for the length of the fellowship
APPLICATION	Districts submit <i>Rotary World Peace Fellowship Application</i> (083-EN).
DEADLINES	Districts submit one application to TRF by 1 July for world-competitive selection. Check with district Rotary World Peace Fellowships chair for district deadline.
CRITERIA FOR SUCCESS	Candidates should have <ul style="list-style-type: none"> <li>▶ Appropriate undergraduate degree to gain entrance to the proposed Rotary Centers master's degree or certificate program</li> <li>▶ Work or service experience in relevant fields</li> <li>▶ A demonstrated commitment to peace and international understanding</li> </ul> <p>See Web site for complete criteria.</p>

DECISION Up to 60 fellows selected annually on world-competitive basis. Trustee-approved applicants receive confirmation by 15 December.

E-mail questions to [contact.center@rotary.org](mailto:contact.center@rotary.org) or call 866-9ROTARY.

## **ROTARY PEACE AND CONFLICT STUDIES**

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PURPOSE	Equip professionals from various industries and fields with the conflict resolution tools they need to foster peace and peaceful conflict resolution in those fields through study in a short-term certificate course conducted at the Rotary Center for Peace and Conflict Studies at Chulalongkorn University, Bangkok, Thailand. Limited funding is available.
FUNDING	Transportation to and from Bangkok if participant is not a current resident of Bangkok. Other funding varies per participant. Participant costs for this program are funded through a cooperative effort involving TRF and the participant's employer.
APPLICATION	Districts submit <i>Rotary Peace and Conflict Studies Program Application</i> (091-EN).
DEADLINES	Districts submit an unlimited number of applications to TRF twice yearly for world-competitive selection. Application deadlines fall around 1 December (for July session) and 1 July (for January session) each year. Check with district Rotary World Peace Fellowships chair for district deadline.
CRITERIA FOR SUCCESS	Candidates should have <ul style="list-style-type: none"><li>▶ Established careers in relevant fields</li><li>▶ Minimum 5 years relevant work experience</li><li>▶ A demonstrated commitment to peace and international understanding</li></ul> See Web site for complete criteria.
DECISION	Up to 30 participants selected on a world-competitive basis for each session with two sessions held annually. Trustee-approved applicants receive confirmation in February (July session) and September (January session).

CANNOT BE USED FOR Rotarians; honorary Rotarians; employees of a club, district, or other Rotary entity, including Rotary International; spouses, lineal descendants (child or grandchild by blood, legal adoption, or marriage without adoption), or ancestors (parent or grandparent by blood) of any living person in the foregoing categories; spouses of lineal descendants

E-mail questions to [contact.center@rotary.org](mailto:contact.center@rotary.org) or call 866-9ROTARY.

## GROUP STUDY EXCHANGE

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**PURPOSE** Enable an exchange of teams of outstanding young non-Rotarian business and professional people between districts in different countries. Group Study Exchange (GSE) teams may have special focuses, such as a single vocation, humanitarian concerns, or neighboring country issues.

**FUNDING** World Fund covers the cost of least expensive round-trip transportation for four team members and one Rotarian team leader for four to six weeks. One World Fund Award is available each year to districts in good standing regardless of their contributions to The Rotary Foundation.

Districts may also allocate a portion of the District Designated Fund (DDF) to send a GSE team in any program year. The *SHARE* cost for one district to send a GSE team using DDF is \$11,000 (or \$6,000 for a Neighboring Country GSE).

Districts may also donate DDF to a partner district to cover the cost of sending a GSE team.

Districts may send a maximum of two GSE teams per program year (one funded through World Fund, the other through DDF or a DDF donation).

Additional funding for GSE teams:

- ▶ Up to \$1,000 per team for language training (Districts may apply additional DDF for this purpose.)
- ▶ Up to \$500 to defray the cost of a visiting GSE team's attendance at the host district conference

Districts may also allocate DDF for the following enhancements:

- ▶ \$2,000 each for up to two additional non-Rotarian team members (\$1,000 each for a Neighboring Country GSE)
- ▶ \$500 for additional team orientation costs

For districts in low-income countries only:

- ▶ Up to \$600 to defray the cost of transport within the district for the visiting GSE team
- ▶ Multicountry low-income districts are eligible for an additional \$2,500 subsidy for transport of a visiting GSE team within the district.

#### APPLICATIONS

Districts submit the following applications:

- ▶ *Group Study Exchange District Application* (167-EN)
- ▶ *Group Study Exchange Team Leader Application* (260-EN)
- ▶ *Group Study Exchange Team Member Application* (161-EN) for each team member

#### DEADLINES

District applications due at TRF 1 October. GSE team leader and GSE team member applications due two months before departure date or TRF may cancel or postpone the GSE. Check with district GSE subcommittee chair for district deadline.

#### CRITERIA FOR SUCCESS

Non-Rotarian team members

- ▶ Must be between the ages of 25 and 40
- ▶ Must be currently employed in any recognized business or profession on a full-time basis and have two years experience in their chosen profession
- ▶ Must be citizens of the sponsor district/country
- ▶ Must live or work in the sponsor district
- ▶ *Must not* be spouses or lineal descendants of Rotarians

Rotarian team leader cannot be the district governor, immediate past governor, or governor-elect at the time the team travels. Past district governors may serve as team leaders only if there has been an open selection process within the district. Spouses cannot accompany team leaders or team members under any circumstances. See RI Web site for complete criteria.

DECISION

Pairing confirmation to districts by 31 January or before the International Assembly

E-mail questions to [contact.center@rotary.org](mailto:contact.center@rotary.org) or call 866-9ROTARY.

## **EDUCATIONAL PROGRAMS RESOURCE MATERIALS .....**

*Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers* (012-EN). Publication in CD-ROM format designed to help clubs and districts successfully sponsor and host Ambassadorial Scholars and University Teachers.

*Ambassadorial Scholarships Program — Investing in World Peace* (432-EN). Ten-minute video commemorating the 50th anniversary of The Rotary Foundation's first educational program. Video can be used to promote the Ambassadorial Scholarships program at Rotary and Rotaract club meetings and on informational visits to secondary and postsecondary institutions.

*Ambassadorial Scholarships/Rotary Grants for University Teachers Brochure* (132-EN). Four-color leaflet suitable for display by clubs or districts. Describes the program and application procedures for potential applicants.

*Rotary Centers for International Studies Program Guide for Rotarians* (085-EN). Information that clubs and districts need to successfully select and sponsor Rotary World Peace Fellows.

*Rotary Centers for International Studies in peace and conflict resolution* (089-EN). Eight-minute video explains the Rotary Centers for International Studies and the Rotary World Peace Fellowships program as well as their history, vision, and objectives.

*Rotary Peace and Conflict Studies Program Guide for Rotarians* (104-EN). Information that clubs and districts need to successfully select and sponsor Rotary Peace and Conflict Studies participants.

*Rotary Peace and Conflict Studies Program Brochure* (105-EN). Four-color leaflet suitable for display by clubs and districts. Describes the program, application procedures, and funding information for potential applicants and their employers.

*Group Study Exchange Brochure* (160-EN). Four-color leaflet suitable for display by clubs or districts. Describes the GSE program and application procedures for potential team members, their employers, and Rotarians.

*Group Study Exchange Program Guide for Rotarians* (165-EN). Publication designed to help districts successfully sponsor and host GSE teams. Available in CD-ROM format.

# Rotary Foundation Alumni

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Rotary Foundation alumni are the more than 100,000 people who have received program awards from the Foundation since 1947. Foundation alumni include Ambassadorial Scholars, Rotary World Peace Fellows, Group Study Exchange team leaders and members, Rotary Peace and Conflict Studies Program participants, and recipients of Rotary Grants for University Teachers and Volunteer Service Grants.

Talented, committed individuals, Foundation alumni know Rotary well and share its vision of furthering world understanding and peace. They are available to speak at Rotary functions or participate in Rotary programs. Alumni are powerful advocates for the Foundation because they provide the human face of Rotary programs and a sense of commitment to the world community. They serve as volunteers for community and international service projects and are potential Rotary club members and donors to The Rotary Foundation.

Contact your district alumni subcommittee chair to identify Foundation alumni available for speaking engagements or to invite them to participate in club activities.

E-mail questions to [alumni@rotary.org](mailto:alumni@rotary.org).

## Foundation Funding

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### **ANNUAL PROGRAMS FUND CONTRIBUTIONS**

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PURPOSE	Provide the necessary funding for operation of Rotary Foundation programs. Visit <a href="http://www.rotary.org">www.rotary.org</a> for additional information, including ways to give.
HOW FUND WORKS	Contributions made by individuals, clubs, and districts are invested for three years. After three years <ul style="list-style-type: none"><li>▶ 50 percent of the original contribution is returned to the district through the DDF.</li><li>▶ 50 percent of the original contribution is provided to the World Fund to support humanitarian programs and provide one Group Study Exchange per district every year.</li></ul>

- ▶ Investment earnings support administrative costs and may be used to benefit the Foundation’s humanitarian and educational programs.

RECOGNITION      Gifts to the Annual Programs Fund count toward Rotary Foundation Sustaining Member Recognition, Paul Harris Fellow Recognition, Multiple Paul Harris Fellow Recognition, and Major Donor Recognition.

## PERMANENT FUND GIFTS

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Purpose      Ensure the long-term viability of TRF and its programs. Spendable earnings from the Permanent Fund, an endowed fund, enable TRF to expand existing programs and underwrite new humanitarian, educational, and cultural programs. Visit [www.rotary.org](http://www.rotary.org) for additional information, including ways to give.

How Fund Works      Contributions are invested in perpetuity. A percentage of the total value of the fund is spent annually to benefit TRF programs.

- TYPES
- ▶ Outright gifts of property, cash, or investments
  - ▶ Life income gifts (e.g., charitable remainder trusts, charitable gift annuities, pooled income fund)
  - ▶ Testamentary gifts through a will or estate plan

RECOGNITION      Those who notify TRF they have made a provision in their will or estate plan or who make an outright gift of at least \$1,000 are recognized as Benefactors. Those who inform the Foundation they have made a major gift commitment (\$10,000 or more) in their final estate plan will receive Rotary Foundation Bequest Society Recognition. Those whose cumulative outright contributions are \$10,000 or more are recognized as Major Donors.

## **WHERE DO I SEND MY CONTRIBUTION?**

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### **United States**

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

### **Canada**

The Rotary Foundation (Canada)  
Box B9322  
P.O. Box 9100, Postal Station F  
Toronto, ON M4Y 3A5  
Canada

### **Brazil**

Rotary International  
Rua Tagipuru 209  
01156-000 São Paulo, SP  
Brazil

### **Southern South America**

Rotary International  
Florida 1, P.2,  
1005 Buenos Aires, CF  
Argentina

### **Europe and Africa**

Rotary International  
Witikonstrasse 15  
CH-8032 Zurich  
Switzerland

### **Great Britain & Ireland**

RI in Great Britain & Ireland  
Kinwarton Road  
Alcester  
Warwickshire B49 6PB  
England

### **South Asia**

Rotary International  
Thapar House  
2nd Floor, Central Wing  
124 Janpath  
New Delhi 110 001  
India

### **South Pacific & Philippines**

Rotary International  
McNamara Centre, Level 2  
100 George Street  
Paramatta, NSW 2150  
Australia

### **Japan**

Rotary International  
NS3 Bldg. 1F  
2-51-3 Akabane, Kita-ku  
Tokyo 115-0045  
Japan

### **Korea**

Rotary International  
Room 705, Miwon Bldg.  
43 Yoido-dong, Yongdungpo-gu  
Seoul 150-733  
Korea

*In countries with currency restrictions,  
please contact your district Rotary  
Foundation chair for the address to  
send contributions.*

## CONTRIBUTION RECOGNITION

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PURPOSE	Acknowledges the financial support generously provided by individuals. Visit <a href="http://www.rotary.org">www.rotary.org</a> for additional information.
TYPES	Rotary Foundation Sustaining Member (\$100) Paul Harris Fellow (\$1,000) Multiple Paul Harris Fellow (\$2,000-\$9,999) Benefactor (\$1,000 contribution to the Permanent Fund or provision for the Permanent Fund in estate plan) Bequest Society (at least \$10,000 commitment in estate plan) Major Donor (at least \$10,000 in outright giving) Arch C. Klumph Society (at least \$250,000 in outright giving)

E-mail questions to [funddevelopment@rotary.org](mailto:funddevelopment@rotary.org) or call 866-976-8279.

## FUND DEVELOPMENT RESOURCE MATERIALS .....

*Every Rotarian, Every Year Brochure* (957-EN). For presentation to every club member. Informational brochure about the need for Rotarians to participate in and contribute to Rotary Foundation programs.

*Every Rotarian, Every Year Club Success Kit* (958-EN). Informational packet to help club and district leaders work toward achieving their Annual Programs Fund goals.

*A Guide to Annual Giving* (142-EN). A comprehensive overview of the Annual Programs Fund for club and district leaders that provides information on how contributions are used, why people give, goal setting, and strategies for achieving Annual Programs Fund goals.

*Two Needs, Two Ways of Giving* (173-EN). Brochure that explains the Foundation's Annual Programs Fund and Permanent Fund, why gifts are needed to both funds, and how each is essential to the health of Rotary's international service.

*Donor Recognition Booklet* (189-MU). This multilanguage, four-color illustrated booklet explains all forms of donor recognition available from The Rotary Foundation, including Paul Harris Fellows, Benefactors, and Major Donors.

*Annual Programs* (122-EN). A five-minute video providing a visual montage of projects funded by TRF that gives a firsthand look at what the Foundation is able to accomplish, thanks to the generosity of Rotarians.

*Paul Harris Fellows: Doing Good in the World* (120-EN). An 11-minute video that provides an inspirational overview of Rotary Foundation programs and testimonials by Rotarians, designed to help increase the number of Paul Harris Fellows in Rotary clubs.

*You Make the Difference* (067-EN). A 10-minute video providing an inspirational overview of The Rotary Foundation.

*You — The Rotary Foundation* (170-MU). A four-minute inspirational video with images and music only that shows people around the globe helped by the Foundation.

*Securing the Future — Your Bequest to The Rotary Foundation* (183-EN). Information on how to support the Permanent Fund. Provides suggested wording for will bequests and codicils. Benefactor Gift Commitment Card attached.

## SHARE SYSTEM

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The *SHARE* system is the mechanism through which Rotary Foundation program awards are distributed worldwide. In the *SHARE* system, Annual Programs Fund contributions to the Foundation are transformed into Ambassadorial Scholarships, Matching Grants, Group Study Exchanges, and more.

At the end of every contribution year, each Rotary district's contributions to the Annual Programs Fund are divided into two funds: 50 percent to the World Fund and 50 percent to the District Designated Fund (DDF).

The 50 percent to the World Fund pays for worldwide programs available to all Rotary districts and clubs, regardless of specific contributions. The remaining 50 percent is used by the district to fund the Foundation programs it chooses to participate in, such as Ambassadorial Scholarships, credit toward the sponsor portion of a Matching Grant, or an additional Group Study Exchange, and is called "DDF." Clubs can access these funds through the district Rotary Foundation committee.

## THE SHARE 3-YEAR CYCLE

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An additional facet of the *SHARE* system is its unique funding cycle wherein Annual Programs Fund contributions are invested for three years and used for programs three years after they are received. The three-year cycle gives districts time for program planning and participant selection and allows the Foundation to pay for administration and fund development costs from the earnings from those investments.

E-mail questions to [share.mailbox@rotary.org](mailto:share.mailbox@rotary.org) or call 847-866-3362.

## **GENERAL FOUNDATION RESOURCES .....**

*Rotary Foundation Facts* (159-EN). A brief statistical overview of the organization, scope, and programs of the Foundation.

*District Rotary Foundation Committee Manual* (300-EN). A resource manual designed for the district Rotary Foundation committee.

*The Rotary Foundation Annual Report* (187B-EN). Audited financial statements for the Foundation for the most recently completed fiscal year, showing all revenues and expenditures, as well as program information and profiles (available December each year).

*The Rotary Foundation: The International Vision of Rotary* (065-EN). A 15-minute documentary with footage from around the world that provides an inspirational overview of the Foundation's humanitarian and educational programs.

*The Rotary Foundation: Be a Part of It* (131-EN). An eight-minute video that features brief anecdotes about Group Study Exchange, Matching Grants, PolioPlus, and Rotary Foundation Scholarship programs.

## **DIRECT FOUNDATION QUESTIONS TO NEW CONTACT CENTER**

English-speaking Rotarians in the USA and Canada can now direct inquiries about Foundation programs to a central location called the Contact Center.

North American Rotarians can call or e-mail to check on donations and recognition points, deadlines for grants and applications, whom to contact regarding applications, and any other questions about the Foundation.

Call 866-9ROTARY (866-976-8279) or e-mail the Contact Center at [contact.center@rotary.org](mailto:contact.center@rotary.org).

## **DISTRICT ROTARY FOUNDATION RESOURCES .....**

To provide continuity of leadership, the district Rotary Foundation committee chair (DRFCC) shall be appointed for a three-year term, subject to removal for cause. Removal for cause must have the Trustee chair's prior approval. The district governor (if selected) scheduled for each of the years of the three-year term for the DRFCC will participate in the selection of the DRFCC. This selection should take place and be reported to TRF no later than 1 March before taking office on 1 July of the same calendar year.

The DRFCC may be reappointed but it must be for another three-year term and the governors under whom the DRFCC will serve will participate in the selection. Although not mandatory, it is recommended that this post be filled, if possible, by a past district governor. The current district governor cannot serve as

the DRFCC. Districts will not have access to their District Designated Fund until the DRFCC is appointed. The DRFCC serves under the direct leadership of the district governor and the decisions for the use of DDF are to reflect the decisions of the district Rotary Foundation committee composed of the subcommittee chairs. The district Rotary Foundation subcommittee chairs are appointed annually by the district governor whom they will serve.

Rotary Foundation  
Committee Chair \_\_\_\_\_

Alumni  
Subcommittee Chair \_\_\_\_\_

Annual Giving  
Subcommittee Chair \_\_\_\_\_

Grants  
Subcommittee Chair \_\_\_\_\_

Group Study Exchange  
Subcommittee Chair \_\_\_\_\_

Permanent Fund  
Subcommittee Chair \_\_\_\_\_

PolioPlus  
Subcommittee Chair \_\_\_\_\_

Rotary World Peace  
Fellowships Chair \_\_\_\_\_

Scholarships  
Subcommittee Chair \_\_\_\_\_







**The Rotary Foundation of Rotary International**

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