
7 The Rotary Foundation

The mission of The Rotary Foundation is to support the efforts of Rotary International in the fulfillment of the Object of Rotary, Rotary's mission, and the achievement of world understanding and peace through local, national, and international humanitarian, educational, and cultural programs.

The Rotary Foundation provides your club the opportunity to participate in and contribute to programs that make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and retain members. When Rotarians directly experience Foundation programs, they can be inspired to contribute to The Rotary Foundation. Foundation programs are supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world.

Responsibilities

As president-elect, you have the following Rotary Foundation responsibilities:

- Reviewing your club's current involvement with Foundation programs, using the *Planning Guide for Effective Rotary Clubs* (appendix 39)
- Reviewing your club's financial contributions to The Rotary Foundation, using Member Access at www.rotary.org
- Setting your club's financial contribution and program participation goals for your year, using the *Planning Guide for Effective Rotary Clubs* and The Rotary Foundation Fund Development Club Goal Report Form (distributed at PETS)
- Appointing and meeting with your club's Rotary Foundation committee to develop an action plan to carry out your club's Foundation goals
- Understanding the connection between program participation and financial support of The Rotary Foundation
- Knowing the resources available to help your club support The Rotary Foundation

As club president, your leadership will be particularly important to ensuring that steady progress is made toward Foundation goals. Use the following strategies to encourage club members to support club goals:

Plan weekly meetings and activities in observance of Rotary Foundation Month (November), World Understanding Month (February), and Literacy Month (March).

- Conduct inspirational Rotary Foundation-focused weekly club programs four times a year, or at least twice a year.
- Contact your district Rotary Foundation committee chair to find alumni or volunteers to relate their experiences with The Rotary Foundation.
- Encourage club members to get involved in Rotary Foundation programs through the Humanitarian Grants Program and Educational Programs.
- Ask club members to contribute to the Foundation, giving extra attention to members who have never given.
- Acknowledge contributions and involvement in Foundation programs.
- Work with your Foundation committee to ensure proper stewardship of Foundation grant funds.

Rotary Foundation Committee

The club-level committee structure for The Rotary Foundation should be determined by the Foundation goals your club sets. For example, if your plans include applying for a humanitarian grant, your club may want to have a grants subcommittee.

When appointing your Rotary Foundation committee, choose Rotarians with excellent communication skills, international experience, and community or international volunteer experience. Former program participants are also good candidates.

The Rotary Foundation committee should develop and carry out plans to support The Rotary Foundation through financial contributions and club participation in Foundation programs. Include the Foundation committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

Rotary Foundation Committee Responsibilities

Your Rotary Foundation committee has the following responsibilities:

- Assessing the current state of the club's Foundation efforts with the president-elect
- Setting club goals that support district goals for Foundation fundraising and program participation
- Assisting the president in developing a Foundation action plan
- Identifying Rotary Foundation resources available to support club goals
- Educating Rotarians about The Rotary Foundation
- Ensuring proper stewardship of Foundation grant funds

District Support for The Rotary Foundation

Members of the district Rotary Foundation committee can provide guidance about The Rotary Foundation. It can also put your club in contact with other Rotary clubs working on similar projects. Contact your district Rotary Foundation chair with questions about The Rotary Foundation.

You'll find more information on The Rotary Foundation committee in the *Club Committee Manual*.

Club presidents and secretaries can review their club's Foundation contributions in Member Access at www.rotary.org.

Information about the variety of ways your club can participate in the programs of The Rotary Foundation can be found in *The Rotary Foundation Quick Reference Guide*.

District Rotary Foundation Seminar

The purpose of the district Rotary Foundation seminar is to reach every Rotarian with The Rotary Foundation's message of achieving world understanding and peace. Club presidents, club Foundation committee members, and other interested Rotarians are encouraged to attend to learn more about the Foundation.

Rotary Foundation Programs

The Rotary Foundation has three main program areas:

- Educational Programs
- Humanitarian Grants Program
- PolioPlus

Educational Programs

Through its Educational Programs, The Rotary Foundation furthers international understanding by providing opportunities for students, educators, and business and professional people to experience another culture and develop long-lasting friendships. Through Educational Programs, participants learn about the needs of their local and world communities and the opportunities available through Rotary to help address them. The following educational programs are offered:

- Ambassadorial Scholarships
- Rotary Grants for University Teachers
- Group Study Exchange (GSE)
- Rotary Centers for International Studies in peace and conflict resolution
- Rotary Peace and Conflict Studies (Chulalongkorn University)

For a description of these programs, see appendix 29.

Rotarians are involved in the selection, orientation, and hosting of Educational Programs participants. Your club can get involved with Educational Programs in a variety of ways, including:

- Inviting scholars, Rotary World Peace Fellows, and GSE team members to share their experiences with your club
- Nominating Ambassadorial Scholars, Rotary World Peace Fellows, Peace and Conflict Studies Fellows, Rotary Grants for University Teachers recipients, or GSE team members
- Publicizing the exchange opportunity

Humanitarian Grants Program

The Humanitarian Grants Program of The Rotary Foundation provides grants to Rotary clubs and districts to implement humanitarian projects. Several grant types are available to address different service needs and funding options:

- Matching Grants
- District Simplified Grants

- Health, Hunger and Humanity (3-H) Grants
- Volunteer Service Grants

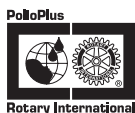
For a description of the Humanitarian Grants Program, see appendix 29.

The Trustees of The Rotary Foundation have established the following standards to guide the Humanitarian Grants Program:

- Grants should address humanitarian needs that Rotarians have identified in their communities with the aim of providing sustainable development.
- All Rotary Foundation grants require the active participation of Rotarians.
- Grants should assist in the development of stronger Rotary networks.
- All grants must display a commitment to stewardship of funds, which reflects The Four-Way Test and responsible fiscal oversight. Stewardship includes detailed and committed project planning, submission of complete and accurate applications with documentation, direct Rotarian involvement in the implementation of the project, transparency in all financial transactions, and efficient and effective reporting. Improper stewardship of funds will be promptly investigated by the Trustees and may result in your club and district not receiving future Foundation funding.

Specific eligibility criteria and application forms for each humanitarian grant and educational program are available through the *RI Catalog*, at www.rotary.org, or from your district Rotary Foundation committee.

PolioPlus



Rotary's most recognized program is the effort to eradicate polio. PolioPlus is the corporate program of Rotary International; activities related to it, such as fundraising and immunization projects, are carried out through The Rotary Foundation. More than one million Rotarians worldwide have contributed over US\$600 million to PolioPlus. In addition, Rotary members around the world serve as a powerful volunteer network at the local level, providing support at clinics and mobilizing their communities for immunization or other polio-eradication activities. The PolioPlus Partners program allows Rotary clubs, districts, and individual Rotarians to voluntarily assist in reaching Rotary's goal of a polio-free world.

Your club can help ensure that the goal of global polio eradication is achieved by conducting the following activities:

- Working with local health officials to decrease the risk of polio in your community by maintaining high rates of immunization
- Contributing to PolioPlus to support critical global eradication needs in polio-endemic countries
- Participating in PolioPlus Partners to help provide supplemental support to Rotarians who are working to eradicate polio in their countries
- Devoting a weekly club program to the topic of polio eradication
- Ensuring club members remain informed and involved until the world is certified polio-free
- Contacting national PolioPlus committee chairs to assist with surveillance activities

Foundation Alumni

Rotary Foundation alumni are the more than 90,000 people who have received program awards from the Foundation since 1947. Your club should maintain contact with former Foundation program participants in your area, who are advocates for The Rotary Foundation. Your club should use Foundation alumni to show the value of Foundation programs. Encourage alumni to become Rotarians and potential donors to The Rotary Foundation. Contact the Rotary Foundation alumni coordinator for your region to find out how you can integrate Foundation alumni into club activities.

Contributions

Financial contributions to The Rotary Foundation fund its educational and humanitarian programs. When Rotarians can see extraordinary results and play active roles in making the world a better place through educational and cultural exchanges and humanitarian projects, they understand how financial support of The Rotary Foundation makes those opportunities possible. Contributions sent to the Foundation can be directed to the Annual Programs Fund or the Permanent Fund.

As president-elect, you will submit The Rotary Foundation Fund Development Club Goal Report Form, which you'll receive at PETS.

Annual Programs Fund — For Support Today



The Annual Programs Fund is the primary source of support for Rotary Foundation programs. The money in the Annual Programs Fund is spent every year on Foundation programs, such as Group Study Exchange, Ambassadorial Scholars, District Simplified Grants, and Matching Grants. As club president-elect, you will lead your club in establishing a goal for the Annual Programs Fund, encouraging every Rotarian to give US\$100 or more every year.

It's essential that you explain to club members the fundamental connection between program participation and financial support. To support the Every Rotarian, Every Year effort:

- Lead by example. Make your gift to the Foundation early in the Rotary year.
- Encourage and ask every club member to make a gift every year.
- Inform members of how their contributions to the Annual Programs Fund support Foundation programs that achieve good in the world.
- Recognize Rotarians who support The Rotary Foundation.

Permanent Fund — To Secure Tomorrow



The Permanent Fund secures Rotary Foundation programs for the future through endowments. The spending portion of the fund's earnings is allocated to benefit Foundation programs every year, providing additional funds to meet the demand for Foundation annual programs such as Matching Grants and Group Study Exchange teams. The recent growth of the Permanent Fund has increased the Foundation's ability to support its annual programs. Donations to the Permanent Fund often take the form of outright gifts, usually Major Gifts or endowed funds, bequests,

or life-income agreements. Because donations to the Permanent Fund can be complex, contact your district Rotary Foundation committee for additional information.

***SHARE* and the District Designated Fund**

The *SHARE* system distributes Rotary Foundation funds worldwide and allows Rotary districts to participate in the process of deciding how funds are spent. Through the *SHARE* system, contributions to The Rotary Foundation are transformed into Ambassadorial Scholarships, Matching Grants, Group Study Exchanges, and other Foundation programs.

At the end of every Rotary year, the contributions to the Annual Programs Fund from all of the Rotary clubs in a district are divided into two funds:

- 50 percent credited to the World Fund
- 50 percent credited to the District Designated Fund (DDF)

The World Fund portion is used by the Foundation to pay for the worldwide programs available to all Rotary districts. The DDF portion is used by your district to fund the Foundation programs of its choice.

The Rotary Foundation has a unique funding cycle that uses contributions 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 invest the contributions. The earnings from those investments pay for general administration and fund development.

Your district Rotary Foundation committee is responsible for deciding how to use the available District Designated Fund, often in consultation with the clubs in your district.

Contribution Recognition

The Rotary Foundation presents recognition to donors in appreciation of financial contributions or commitments for future contributions. Contribution recognition is critical to the ongoing financial support of The Rotary Foundation. The sincere acknowledgement of a donor's gift is the first step toward additional financial support.

The Rotary Foundation provides the following types of contribution recognition to individuals and clubs:

Individuals

- Rotary Foundation Sustaining Member
- Paul Harris Fellow Recognition
- Multiple Paul Harris Fellow
- Memorial Paul Harris Fellow
- Memorial Paul Harris Certificate

For details on Rotary Foundation recognition, see the *Donor Recognition Booklet*.

- Major Donor
- Benefactor
- Annual Programs Fund Recognition banner
- The Rotary Foundation Bequest Society
- Certificate of Appreciation (also available to corporations)

Clubs

- 100% Rotary Foundation Sustaining Member club banner (awarded annually)
- Every Rotarian, Every Year banner (awarded annually)
- Top Three Annual Programs Fund Per Capita Club banner (per district; awarded annually)
- 100% Paul Harris Fellow Club banner (upon request)

Resources

The following resources are available to help your club achieve its Foundation goals:

Informational Resources

- *Donor Recognition Booklet* (189-MU) — Multilanguage booklet detailing all available forms of Foundation donor recognition.
- *Every Rotarian, Every Year Club Success Kit* (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote contributions to the Annual Programs Fund.
- *Official Directory* (007-EN)
- *Planning Guide for Effective Rotary Clubs* (appendix 39)
- *PolioPlus Brochure* (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, and a description of the contributions of Rotary and its major partners and the challenges remaining to achieve a polio-free world.
- *RI Catalog* (019-EN)
- *Rotary Foundation Facts* (159-EN) — Brochure of the most recent Foundation statistics.
- *The Rotary Foundation Quick Reference Guide* (219-EN)

www.rotary.org

Click on:

- Member Access (www.rotary.org)
- The Rotary Foundation (www.rotary.org/foundation) — A comprehensive, current source of detailed information on all aspects of Rotary Foundation programs; Every Rotarian, Every Year fundraising strategies; recognition opportunities; and many free downloads.

Keyword searches:

- Gift Acceptance Policy Manual — Overview of the types of gifts accepted by The Rotary Foundation, including gifts to the Permanent Fund.
- PolioPlus Partners Open Projects List — A list of projects in polio-endemic and high-risk countries in need of support.
- WCS Projects Exchange Database

Financial Resources

- Funds from individual donors or local businesses
- Rotary Foundation grants

Human Resources

- Annual Programs Fund strategic adviser — Rotarian appointed to work with the regional Rotary Foundation coordinator to serve as the primary Annual Programs Fund resource for your specific region.
- District Rotary Foundation committee — Responsible for overseeing all Rotary Foundation activity in your district.
- Major Gift adviser — Rotarian appointed to work with the regional Rotary Foundation coordinator to serve as the primary Permanent Fund and major gift resource for your specific region.
- National PolioPlus committees — Responsible for supporting PolioPlus at the national level and submitting project requests to the PolioPlus Partners program.
- Regional Rotary Foundation coordinator (RRFC) — Rotarian appointed to serve as the primary Rotary Foundation resource for your specific region.
- Rotary Foundation alumni coordinator (RFAC) — Rotarian appointed to work with the regional Rotary Foundation coordinator to encourage Rotary clubs and districts to involve Foundation alumni in Rotary activities.
- Rotary Foundation Development Services staff — Staff members at RI World Headquarters who can answer questions about recognition contributions to The Rotary Foundation.
- Rotary Foundation staff

For contact information, see the *Official Directory* or go to www.rotary.org. Publications can be ordered from the *RI Catalog* or downloaded at www.rotary.org.