

# Our Foundation

I am "doing good" in my local community and around the world



## Session Goals

Understand the Basic Goals, Programs & Financing of our Rotary Foundation

Discuss the Importance & Value of our Rotary Foundation to your Club

## Materials

  Insert\_OF-1: Rotary News 1A, 1B, 1C, 1D, 1E

  Insert\_OF-2: Rotary Foundation Grants and Related Programs, from Rotary Foundation Reference Guide, 219-EN (1012), pages 8-12

  Insert\_OF-3: Foundation Facts- Giving 159-EN (1113), Graphics <https://www.rotary.org/en/document/12436>

  Rotary Foundation Reference Guide 219-EN (1012) <https://www.rotary.org/en/document/518>

  Connect for Good (formerly Rotary Basics) 595-EN (613) <https://www.rotary.org/en/document/576>

 Doing Good in the World DVD @ [shop.rotary.org](http://shop.rotary.org) or vignettes at <http://vimeo.com/album/1872866>

Key:  attached insert  online  article  ppt

This is a course in the Service Spiral going across the three days of RLI. Additional courses building on this session are Service Projects, Targeted Service, International Service, Rotary Opportunities, and Making a Difference. Leadership and Membership have separate spirals.

While this course and others within RLI discuss Rotary Foundation topics, you should consult your district for specific Rotary Foundation training.

## Session Topics

- 1) What is a foundation? What are some examples of foundations? What are some of the advantages of a foundation?
- 2) What do you know about our Rotary Foundation? What does it do? Who runs it? Why do we need it?

*... it seems eminently proper that we should accept endowments for the purpose of doing good in the world, in charitable, educational or other avenues of community progress...*

1916-17 RI Pres. Arch Klumph  
RI Convention, Atlanta GA  
June 18, 1917

- 3) What is the difference between Rotary International and our Rotary Foundation?
- 4) After review of the Rotary News Inserts (Inserts 1A-1E), discuss the following questions: Why this project? Why now? Why Rotary?
- 5) What current or past projects has your club done using the programs of our Rotary Foundation?
- 6) How can you and your club contribute to and raise funds for our Rotary Foundation? What incentives does our Foundation offer to enhance giving?
- 7) When you give money to our Rotary Foundation, can you designate where the funds go and for what purpose? What are the options and how do they work?
- 8) What is meant by “EREY”?

*The mission of  
The Rotary Foundation is  
to enable Rotarians to  
advance world  
understanding, goodwill  
and peace through the  
improvement of health,  
the support of education,  
and the alleviation of  
poverty.*

<b>TRF Giving &amp; Recognition</b>	<b>Annual Fund</b>	<b>Endowment Fund</b>
“Every Rotarian, Every Year” or “EREY” recognizes clubs in which all members contribute to the Annual Fund each year	“Annual Fund” is TRF’s “checking account”, to be spent on programs in the 3 <sup>rd</sup> year	“Endowment Fund” is TRF’s “savings account”, formerly the “Permanent Fund”
“100% Sustaining Club” is when all club members attain sustaining member status	“Sustaining Member” or “Sustainer” recognizes a cumulative US \$100 gift each year to the Annual Fund	“Benefactor” recognizes a cumulative US \$1,000 gift or pledge to the Endowment Fund
“100% Paul Harris Fellow Club” is when all club members attain PHF status	“Paul Harris Fellow” or “PHF” recognizes a cumulative US \$1,000 gift to the Annual Fund	“Bequest Society” recognizes a cumulative US \$10,000 gift or pledge to the Endowment Fund
“Triple Crown Club” is when all club members attain Sustaining, PHF, and Benefactor status	“Paul Harris Society” recognizes a cumulative US \$1,000 gift each year to the Annual Fund	“Major Donor” recognizes a cumulative US \$10,000 gift to TRF
No portion of your Rotary dues are required to go to TRF. All contributions are voluntary.	“Polio Plus” are funds given to TRF for the eradication of polio worldwide	“Arch Klumph Society” recognizes a cumulative US \$250,000 gift to TRF

## **Insert OF-1A: Rotary News:** **Rotary and Partners “this close” to Eradicating Polio Worldwide**

*Kabul, Afghanistan – January 1, 2014* – In 1985, after successfully eradicating polio in a project in the Philippines, Rotary launched its PolioPlus program to eradicate polio worldwide. Today, over a million Rotarians, joined by an impressive list of partners, are “this close” to eradicating polio in the world, seeing a 99% reduction in cases since the 1980s, fewer than 250 cases reported in 2012, and only 3 polio endemic countries left, conflict-ridden Afghanistan, Pakistan, and Nigeria. Over 2 billion children in 122 countries are now protected from polio. But, the risk of resurgence of the virus is real.

Poliomyelitis (polio) is a crippling and potentially fatal disease that still threatens children in parts of the world. The poliovirus invades the nervous system and can cause paralysis in a matter of hours. It can strike at any age but mainly affects children under five. Over 1,000 children per day were contracting polio in 1985. If polio is not completely eradicated from the earth, experts believe polio could rebound to 10 million cases in the next 40 years. The public health and global economic impact of these future polio cases is significant.

As for Rotarians, for more than a quarter century club members have donated their time and



*Polio survivors in Africa. Photo Credit: WHO/Rotary International*

personal resources to end polio. Every year, hundreds of Rotary members work side-by-side with health workers to vaccinate children in polio-affected countries. Rotarians work with partners like UNICEF to prepare and distribute mass communication tools to share the message with those isolated by conflict, geography, or poverty. Rotary members also recruit fellow volunteers, assist with transporting the vaccine, and provide other logistical support.

Rotary’s early successes brought on an impressive list of partners that are necessary to eliminate polio worldwide. The Global Polio Eradication Initiative, formed in 1988, is a public-private partnership including Rotary, the World Health Organization, the U.S. Centers for

Disease Control and Prevention, UNICEF, the Bill & Melinda Gates Foundation, and governments of the world. Rotary’s focus is advocacy, fundraising, volunteer recruitment and awareness-building. Fundraising led by Rotarians helps to provide much-needed operational support, medical personnel, laboratory equipment, and educational materials for health workers and parents. Rotary has contributed more than US\$1.2 billion and countless volunteer hours. In addition, Rotary’s advocacy efforts have played a role in decisions by donor governments and corporations to contribute over \$9 billion to the effort.

Rotarians vow not to quit the effort until all cases of polio are gone.

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

## Insert OF-1B: Rotary News: **Rotary Peace Fellow Helps Build New Countries and Old**

*Brasilia, Brazil– September 10, 2013.* Through her work for the UN Development Program Brazil, 2005-07 former Rotary Peace Fellow at Universidad del Salvador Izabela da Costa Pereira advises the Brazilian government on how best to support reconstruction and development projects in Haiti.

*“I learn how to deal with the unexpected and how to overcome obstacles. What motivates me is that I help my country to help another nation in need,”* she says. Previously, Pereira worked as a democratic governance officer with the UN Integrated Mission in Timor-Leste (UNMIT), monitoring the country’s institutions and helping them determine how to operate democratically to best serve their people.

Pereira’s experience as a Rotary Peace Fellow prepared her well for her career. During her fellowship, she served as an electoral observer with Organization of American States missions in Colombia and Nicaragua; explored conflict prevention strategies with the United Nations Development Fund for Women in Senegal; and served on a UN peace building mission for women in Côte d’Ivoire.

Each year, Rotary selects “Peace Fellows”, individuals from around the world to receive fully funded academic fellowships at one of the Rotary Peace Centers. These fellowships cover tuition and fees, room and board,



*Izabela da Costa Pereira with children outside a rural village in Timor-Leste where she is a Democratic governance officer with U.N. Integrated Mission in Timor-Leste.*

round-trip transportation, and all internship and field study expenses. The program offers master’s degree fellowships at premier universities around the world in fields related to peace and conflict resolution and prevention. Programs last 15–24 months and require a practical internship of 2–3 months during the academic break. Each year up to 50 master’s fellowships are awarded.

Pereira states: *“the Rotary Foundation has opened so many doors of opportunity. No doubt, all my experiences in Africa, South Asia, and Latin America are the results of the great experience I had as a Rotary Peace Fellow.”*

In a recent interview with the global affairs magazine, *Diplomatic Courier*, she described her proudest personal contribution to foreign policy as *“...having contributed to the nation building of one of the newest states of the 21st century... As a Democratic*

*Governance Officer at Timor-Leste UNMIT, I directly assisted on political issues related to democratic consolidation and institution strengthening... in strategic policies reforms, anti-corruption, gender, civil service, media, transparency, decentralization, elections, and sustainable socio-economic development. As a new sovereign nation-state, it is fundamental to guarantee its path towards a democratic governance culture that will assure peace, socio-economic development, and stability in a post-conflict scenario.*

*[B]esides my background in international relations, I could use on a daily basis my specialization on peace, conflict resolution, economy, and political affairs for an effective aid.”*

Pereira said *“the need for trained peace-makers has never been greater... more leaders are needed on the local, national and international arena, particularly young professionals”.*

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

## Insert OF-1C: Rotary News: **Rotary Targets First 24 Hours of Life in East Africa**

*Kampala, Uganda – November 1, 2013.*

The Rotary Foundation of Rotary International, a global humanitarian service organization, and Aga Khan University (AKU), a private, non-denominational university promoting human development through research, teaching and community service have formed a partnership to improve maternal and child health in East Africa. Under the partnership, the Rotary Foundation, the charitable arm of Rotary International, will provide grants to Rotary clubs to establish volunteer teams to support the professional development of nursing faculty at AKU's East Africa campuses in Kenya, Tanzania and Uganda.

According to the UN, developing countries account for 99% of the more than 350,000 women who die each year from complications during pregnancy or childbirth. In sub-Saharan Africa, 1 in 30 women is at risk, compared with 1 in 5,600 in developed countries. More than half of maternal deaths are caused by excessive bleeding (35%) and hypertension (18%). Developing countries also account for most of the 7.6 million children who die annually before age 5. Again, East Africa records the highest child mortality rates, with one in seven children dying before age five, and 141,000 annually in Uganda alone. A child's greatest risk of dying is during the first 28 days of life, accounting for 40% of all deaths among children under the age of 5.



Half of newborn deaths occur during the first 24 hours and 75% during the first week of life, with preterm birth, severe infections and asphyxia being the main causes.

In most East African countries there is little public health infrastructure and limited government funding. However, there are Rotary clubs in those countries. Many local Rotary club leaders have acknowledged the problem and want to help with funding, mentoring, personal advocacy and participation. Agha Khan University (AKU) has a campus and a hospital for women in Kampala, one of many it has in Africa and the Middle East. Their campus produces some doctors, but mostly nurses, midwives and health educators, many of whom already work in those roles but themselves are poor, long out of school, and have limited career and

life skills. AKU is poised to make an immediate difference in the public health landscape. Recently, AKU and the World Health Organization (WHO) published a study that makes recommendations on how to target scarce resources for maximum impact on the health of women and children and identifies 56 essential interventions, that when implemented in packages relative to local settings, are most likely to save lives. Some of the interventions include: managing maternal anemia with iron, preventing and managing post-partum hemorrhage, immediate thermal care for newborns, extra support for feeding small and preterm babies, and antibiotics for the treatment of pneumonia in children.

*Photo: Doctor in Uganda. Credit: Rotary*

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

## Insert OF-1D: Rotary News: **Medical Training on Sanitation Saves Lives in Guinea**

Conakry, Guinea - October 25, 2013. A team of health professionals is touring Donka hospital in Conakry, Guinea, in March when they spot more than a dozen large, greenish masses covering the ground. To the U.S. team members, they look like an art installation; in fact, they are hospital gowns and surgical drapes, laundered and spread out to dry. They are a vivid example of the group's objective: to lower deadly infection rates caused by unsterile procedures.

This Rotary Foundation vocational training team, made up of public health professionals, serves in partnership with the nonprofit organization Mercy Ships. Rotary District 7690 in North Carolina, USA, sponsored the team with a Rotary Foundation grant. The team's five members will train Guinean health professionals at the two national hospitals.

The *Africa Mercy*, a 500-foot oceangoing hospital ship, is docked in Conakry for a 10-month medical mission. The Mercy Ships staff and visiting experts, such as this team, will tackle a range of tasks, including setting up medical and dental clinics, conducting health screenings, performing surgeries on board, and conducting health care outreach throughout the country. The ship also will serve as a steel-hulled security blanket.



*"Mercy Ships looks for ways to continue helping local medical professionals after the ship leaves port,"* says Michelle Bullington, who helped advise the team. *"Improving sterilization techniques would have a sustainable impact."*

The team visits Donka hospital, where toilets are flushed with water from a pail, and power outages are common. *"The staff members touch patients without gloves, going patient to patient without washing hands. There are unbandaged wounds, flies and roaches, open sewage right outside a patient facility and no sterile barriers,"* says Sherrill Braswell, adding an observation that he later repeats so often it sounds like a campaign slogan: *"They are doing the best they can with what they have."* For a week, the team provides training in reducing infections, covering topics such as using surgical

gloves, masks, and gowns; controlling rats and mosquitoes; disinfecting with bleach; tracking infectious diseases; and hand-washing.

*"Fifty percent of hospital-associated infections could be prevented with hand-washing,"* Lyon says. Knowledge gaps soon become apparent. Donka's director says her hospital wants to reduce infection, *"but we lack the equipment and supplies. We are willing to do what you do, but as an undeveloped country, we lack the means."* After decoding the health system and enduring the non-gridded power, the team accomplishes its objectives, at least according to pre- and post-tests that show significant learning. Positive results also are evident in the participants, who voice a new commitment to educating family caregivers.

*Adapted from The Rotarian, Nov. 2013, photo credit: MercyShips.*

1. Why Engage this Project?

2. Why Now?

3. Why Rotary?

## **Insert OF-1E: Rotary News: Cambodia's Children "Waste-Pickers" Receive Vital Services**

*Phnom Penh, Cambodia – February 12, 2014.* Phnom Penh's city landfill is at capacity. As in many developing countries, "Waste-pickers" support themselves and their families by sorting garbage for sellable goods. Nearly half are children. They are highly visible as they push their handcarts around the city calling "Hychai".

A local non-profit organization, *Community Sanitation and Recycling Organization* or *CSARO* tries to address the needs of these waste-pickers. Through a variety of programs, *CSARO* helps adults improve their living and working conditions, while also providing educational outreach to the children.

*CSARO* is one of the many locally originating humanitarian projects worldwide that receive funding from *The Global Fund for Children (GFC)*.

*GFC* was the vision of a Rotary Foundation Ambassadorial Scholar traveling in India in 1990, Scholar Maya Ajmera witnessed a group of children sitting in a circle at a train station, listening and answering questions while a teacher led them in simple learning exercises. She learned that the children lived, played, and begged on the train platforms. Seeking a pathway out of poverty, two teachers offered the children free education, clothing, and food. The school



operated on only \$400 per year, serving 40 students who had no other opportunity to learn.

Inspired by this powerful model, Maya founded *GFC* in 1993 based on the belief that small amounts of money, when given to innovative, community-based organizations, could make a lasting impact on the lives of the world's most vulnerable children. By its 10th anniversary, *GFC* had launched additional services to help its grantees grow and thrive, including management support, technical assistance, and networking opportunities. *GFC* also attracts other funders to its grantees and increases grantees' visibility to help them garner international recognition for their work. The result: a global community of strong grassroots organizations that are tackling some of the world's biggest problems.

Now a university professor, Maya stepped down from her position as president of *GFC* in 2011, having grown her initial vision into a thriving global organization. To date, *GFC* has awarded more than \$25 million in grants to more than 500 organizations in 78 countries, touching the lives of over 7 million children worldwide.

Maya Ajmera received her Ambassadorial Scholarship from District 5240 in California, USA, to study at St. Xavier's College in India. From 1947 to 2013, nearly 38,000 men and women from about 100 nations studied abroad as Ambassadorial Scholars. The purpose of the program was to further international understanding, peace and good will among the peoples of the world.

Credits: CSARO/GFC

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2. Why Now?

3. Why Rotary?

## **Insert OF-2: Rotary Foundation Grants & Related Programs**

Rotary Foundation grants support Rotarians' efforts to change lives and serve communities. Rotary's grant model includes:

### **District grants**

District grants are block grants that enable clubs and districts to address immediate needs in their communities and abroad. Districts may request up to 50 percent of their District Designated Fund (DDF) for one grant annually (see "Annual Fund and SHARE" in this guide). Districts manage and disburse these funds to support district- and club-sponsored activities, including vocational training teams, scholarships, humanitarian service projects, and cultural exchanges, provided they are aligned with the Foundation's mission.

### **Global grants**

Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale international humanitarian projects, vocational training teams, and scholarships that have sustainable, measurable outcomes in one or more areas of focus. Activities may be carried out individually or in combination — for example, one grant may support a vocational training team and a related humanitarian project. Global grant projects must have a total budget of US\$30,000 or more. This includes the World Fund award, which is based on a 100 percent match of DDF allocations or a 50 percent match of cash contributions from the sponsors. All global grants must be sponsored by two clubs or districts: a host partner in the country where the activity takes place and an international partner outside that country. When planning a global grant project, sponsors should conduct a thorough needs assessment that explores the pressing concerns in the project location along with the club and community resources available to address them.

### **Packaged grants** *(being phased out in 2015 along with Strategic Partnerships, decision 4/2014)*

Packaged grants supported predesigned projects developed by the Foundation and its strategic partners, which were organizations that work in one or more of Rotary's areas of focus and could offer financial support, technical expertise, or advocacy. The Foundation and the strategic partner provided 100 percent of the funding; Rotarians implemented the grant project.

*Note: Effective 1 July 2013, District Simplified Grants and Matching Grants have been phased out and are no longer part of the grant model.*

### **Areas of focus**

All projects, scholars, and vocational training teams funded by global grants work toward specific goals in one or more of the following areas of focus:

#### **Peace and conflict prevention/resolution**

- Providing training for leaders, including young potential leaders, in prevention and mediation of conflict
- Supporting peace-building in communities and regions affected by conflict
- Supporting studies related to peace and conflict prevention/resolution by career-minded professionals

### Disease prevention and treatment

- Improving the capacity of local health care professionals
- Supporting disease prevention programs, with the goal of limiting the spread of communicable diseases and reducing the incidence of and complications from noncommunicable diseases
- Enhancing the health infrastructure of local communities
- Educating and mobilizing communities to prevent the spread of major diseases
- Preventing physical disability resulting from disease or injury
- Supporting studies related to disease prevention and treatment by career-minded professionals

### Water and sanitation

- Providing equitable access to safe water, improved sanitation, and hygiene
- Strengthening the ability of communities to develop, fund, and maintain sustainable water and sanitation systems
- Supporting programs that enhance communities' awareness of the benefits of safe water, sanitation, and hygiene
- Supporting studies related to water and sanitation by career-minded professionals

### Maternal and child health

- Reducing mortality and morbidity rates for children under the age of five
- Reducing maternal mortality and morbidity rates
- Improving mothers' and children's access to essential medical services, trained community health leaders, and health care providers
- Supporting studies related to maternal and child health by career-minded professionals

### Basic education and literacy

- Involving the community to support programs that strengthen the capacity of communities to provide basic education and literacy to all
- Increasing adult literacy
- Working to reduce gender disparity in education
- Supporting studies related to basic education and literacy by career-minded professionals

### Economic and community development

- Building the capacity of entrepreneurs, community leaders, local organizations, and community networks to support economic development in impoverished communities
- Developing opportunities for productive work
- Reducing poverty in underserved communities
- Supporting studies related to economic and community development by career-minded professionals

## Sustainability

Sustainability means different things to different organizations. For The Rotary Foundation, sustainability means providing solutions to community needs that ensure that the benefiting community can maintain the activities after grant funding ends. Global grant projects must be sustainable and display the following characteristics:

- ✓ Community needs — The host community and Rotary project sponsors develop projects based on the host community's assessment of its needs and strengths
- ✓ Appropriate technology — Project materials are appropriate for the community and, ideally, are purchased locally
- ✓ Sustainable funding — The community is able to sustain the project without ongoing financial support from The Rotary Foundation or other Rotary sources
- ✓ Knowledge transfer — The project includes teaching beneficiaries how to address their ongoing needs after the completion of the project
- ✓ Motivation — The community is able to assume ownership of the project upon its completion
- ✓ Monitoring and evaluation — The project includes a measurement plan to confirm significant improvement, ideally for at least three years

## Scholarships

Scholarships can be funded by both district grants and global grants. District grants have no restrictions on the educational level of the scholarship (e.g., undergraduate or graduate), duration of the program, or field of study. Districts may develop their own criteria for selecting scholars, determine the monetary amount of the awards, and support students attending local universities, as there is no international requirement. Global grants support international graduate-level study related to an area of focus for one to four years.

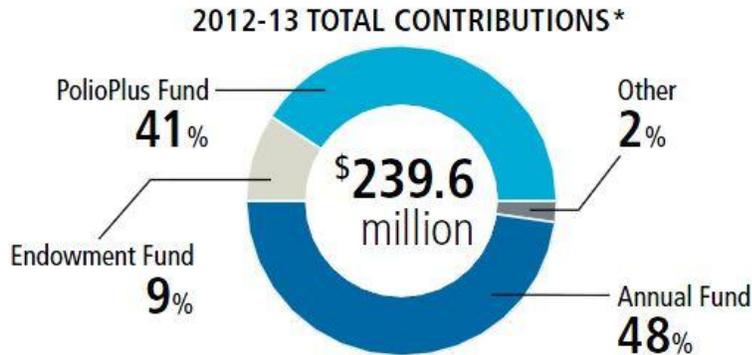
## Vocational training teams

Vocational training teams can be supported by both district grants and global grants. Teams sponsored by district grants have no restrictions on participant age or the duration or focus of the exchange. Global grants address humanitarian needs by supporting teams that travel abroad to provide or receive robust training in one or more areas of focus. At least one team leader, preferably a Rotarian, and two members are required per team. There is no maximum team size or age restriction, but all team participants should have relevant professional skills and experience. Global grant-sponsored teams may provide or receive training in various settings, including universities, hospitals, and companies, and may stay in a range of places, such as Rotarians' homes, university dormitories, and hotels. Training may last for any length of time, and more than one team may travel on a single grant. Training team costs must meet the US\$30,000 global grant minimum for total project cost including team member expenses and other grant activities.

*Excerpted (and updated 8/2014) from The Rotary Foundation Reference Guide, 219-EN (1012)*

## Insert OF-3: Foundation Facts - Giving

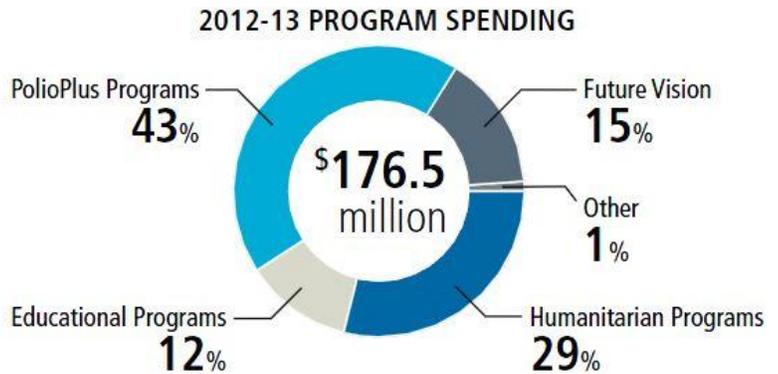
Most recent data available at time of publishing, from Rotary Pub. 159-EN (1113)



# Give

Beginning in 2008, contributions include grants for polio eradication from the Bill & Melinda Gates Foundation. 2012-13 contributions include US \$5.4 million received from Rotary International.

# Do



### SUMMARY STATISTICS

	2012-13	Cumulative
<b>Contributions</b>	<b>\$239.6 million</b>	<b>\$3.2 billion</b>
Annual Fund	\$115.1 million	\$2.0 billion
Endowment Fund	\$20.4 million	\$231.4 million
PolioPlus Fund	\$98.2 million	\$974.7 million
Other	\$5.9 million	\$51.4 million
<b>Program Spending</b>	<b>\$176.5 million</b>	<b>since 1947: \$3.0 billion</b>
Arch C. Klumph Society Members	66	453
Major Donors	1,985	18,359
Bequest Society Members	566	10,035
Benefactors	2,824	90,219
New Paul Harris Fellows	54,595	1.4 million