

The Rotary Foundation

Quick Reference Guide

2009-10

The Rotary Foundation of Rotary International



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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

ROTARY'S US\$100 MILLION CHALLENGE

The Bill & Melinda Gates Foundation awarded The Rotary Foundation a \$100 million grant for polio eradication which Rotary will match dollar-for-dollar over a three-year period. It represents a tremendous validation of the dedication of Rotarians and success of the PolioPlus program.

E-mail questions to [rotary's\\$100millionchallenge@rotary.org](mailto:rotary's$100millionchallenge@rotary.org) or call 847-424-5244.

POLIOPLUS GRANTS

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 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 or call 847-866-3305.

POLIOPLUS PARTNERS GRANTS

PURPOSE	Support urgent social mobilization and surveillance projects submitted by fellow Rotarians in polio-endemic, importation, and high-risk countries.
FUNDING	PolioPlus Partners grants are funded by the general PolioPlus Fund and DDF allocations.

APPLICATION	Grant applications are accepted only from national PolioPlus committee chairs in priority countries.
DECISION	Grants are approved on a rolling basis.

E-mail questions to polioplus@rotary.org or call 847-866-3255.

RESOURCE MATERIALS

PolioPlus: A Gift to the Children of the World (317-MU). An 11-minute DVD highlights Rotary’s latest work in the march toward polio eradication.

Rotary’s US\$100 Million Challenge DVD (985-EN). Provides an overview of Rotary’s efforts to eradicate polio and the three-year fundraising initiative to match the Gates Foundation grant.

Rotary’s US\$100 Million Challenge Brochure (986-EN). Describes Rotary’s commitment to eradicating polio and encourages support for the challenge.

Rotary’s US\$100 Million Challenge Poster (987-EN) Encourages participation in Rotary’s challenge. Suitable for display at Rotary meetings, fundraisers, and other events.

End Polio Now pins (988-MU). Lapel pin with the End Polio Now logo.

End Polio Now note cards (983-MU) Send Rotary note cards (set of 12) and share Rotary’s accomplishments with friends and family around the world. Each card features a stunning photograph representing polio eradication.

End Polio Now cardboard pop-up boxes. Can be used as giveaways or centerpieces at fundraisers.

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

Humanitarian Grants Program

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

- ▶ Involve the active participation of Rotarians
- ▶ Assist in the development of Rotary networks
- ▶ Adhere to strict stewardship guidelines
- ▶ Address humanitarian needs with the aim of providing sustainable development

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

PURPOSE	Fund long-term (two- to four-year) integrated sustainable development projects to improve health, alleviate hunger, or enhance development through self-help activities
FUNDING	<ul style="list-style-type: none">▶ TRF provides \$100,000-\$300,000.▶ Sponsor must provide at least 10 percent of award.
APPLICATION	<ul style="list-style-type: none">▶ <i>Step 1:</i> Submit preliminary proposal letter to TRF for review.▶ <i>Step 2:</i> If the proposal is eligible, the Foundation will invite the sponsors to submit a 3-H Grant Application.
DEADLINES	<ul style="list-style-type: none">▶ Preliminary proposal: 31 March▶ 3-H grant application: 1 August
CRITERIA FOR SUCCESS	<p>The project must</p> <ul style="list-style-type: none">▶ 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▶ Use an integrated approach

	<ul style="list-style-type: none"> ▶ Benefit a large number of people ▶ Be of a self-help nature ▶ Involve a significant number of Rotarians in at least two countries ▶ Be clearly identified as Rotary-supported ▶ Be initiated, controlled, and implemented by Rotarians ▶ Be self-sustaining after grant funding has ended
DECISION	Trustees review applications each year in April.
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

PURPOSE	Assist in funding 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> (Web only).
DEADLINES	Applications are accepted from 1 July to 31 March. Trustees consider applications requesting more than \$25,000 twice a year. Such applications should be submitted no later than 1 August for consideration at the October/November Trustee meeting and no later than 15 December for consideration at the March/April Trustee meeting.
CRITERIA FOR SUCCESS	<ul style="list-style-type: none"> ▶ Grants must address a humanitarian condition that benefits a community in need. ▶ Projects must be new (not already in progress) and feature the active, personal participation of Rotarians in both the international and host countries. ▶ All grants must adhere to the grant policies that govern all grant programs. See www.rotary.org or request a copy from Humanitarian Grants Program staff.

For *Matching Grants \$5,000-\$25,000*, partner Rotary clubs and districts are required to

- ▶ Maintain communication and dialogue for the life of the project
- ▶ Establish a committee of at least three Rotarians
- ▶ Jointly assess community needs and plan the project.
- ▶ Visit the project site on an as-needed basis. The international partner may participate by sharing information through correspondence or by visiting the project site.

For *Competitive Matching Grants \$25,001-\$150,000*, partner Rotary clubs and districts are required to

- ▶ Meet the requirements of Matching Grants \$5,000-\$25,000
- ▶ Conduct a formal community needs assessment
- ▶ 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)

PURPOSE

Support the service activities or humanitarian endeavors of districts

FUNDING

A 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* (Web only) per year.

DEADLINE

Requests are 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	<ul style="list-style-type: none"> ▶ Adhere to the grant policies that govern all grant programs. See www.rotary.org or request a copy from staff (grants@rotary.org). ▶ Respect the wishes of the receiving community and understand and appreciate its tradition and culture. <p>District activities should include:</p> <ul style="list-style-type: none"> ▶ 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 ▶ Involvement in project implementation ▶ Provision of evidence of community involvement and ownership ▶ Organization of meetings with local service providers, local officials, and/or recipients ▶ Promotion of projects in the local media
DECISION	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 at least 50 percent of one DSG before payment will be made on another.

VOLUNTEER SERVICE GRANTS

PURPOSE	Support 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> (Web only).
DEADLINE	Applications are accepted on a rolling basis throughout the year. Applications must be submitted to TRF at least three months before departure with approval obtained at least two months before departure.

CRITERIA FOR SUCCESS

Qualification of travelers is based on the following:

1. There is a defined need within the community for the project, as identified by the host partner.
2. The skills and experiences of the traveler(s) can meet the identified need.
3. The skills and experiences to meet the community need are not available locally.

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.

Recipients of Volunteer Service Grants must comply with TRF policies regarding travel insurance.

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

Applications are approved on a rolling basis.

DECISION

REPORTING

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 within two months of the project's completion.

RESOURCE MATERIALS

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

The Guide to Health, Hunger and Humanity (3-H) Grants (158-EN). Handbook offering comprehensive guidelines on planning and applying for 3-H grants.

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

Volunteer Service Grants Brochure (150-EN). Program description and instructions on applying for a Volunteer Service Grant.

Educational Programs

AMBASSADORIAL SCHOLARSHIPS

PURPOSE

Provide scholarships to students who serve abroad as ambassadors of goodwill to improve international understanding

FUNDING

SHARE/DDF option costs:

- ▶ *Academic-Year Scholarships* for one academic year of studies abroad. Starting in 2010-11: flat grant of \$25,000 to defray costs associated with transportation, fees, room and board, and other miscellaneous expenses.
- ▶ *Multi-Year Scholarships* for two years of degree-oriented studies abroad. Starting in 2010-11: \$12,500-a-year for a flat grant total of \$25,000.
- ▶ *Cultural Scholarships* for either three or six months of intensive language training and cultural immersion abroad while living with a home-stay family. Starting in 2010-11: a flat grant of \$12,000 for three months

and of \$17,000 for six months of intensive language training, cultural immersion, living with a host family, and transportation.

- ▶ *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 one of the possible 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. Applicants must also demonstrate proficiency in the language of the host country (advanced proficiency for Academic-Year and Multi-Year Scholars and basic to intermediate proficiency for Cultural Scholars). 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 or call 847-866-3000. In the United States and Canada, call 866-9ROTARY.

ROTARY GRANTS FOR UNIVERSITY TEACHERS

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: as of 2010-11, \$14,000 for 3 to 5 months or \$25,000 for 6 to 10 months of service
APPLICATION	Districts submit <i>Rotary Grants for University Teachers Application</i> (Web only).
DEADLINES	Applications from districts due at TRF 1 October. Check with district scholarships subcommittee chair for each district's 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">▶ Hold (or have held, if retired) a college or university teaching appointment for three or more years (no specific rank)▶ 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.▶ Applicants may be Rotarians or non-Rotarians.
DECISION	15 December for teaching assignments beginning the next Rotary year

E-mail questions to contact.center@rotary.org or call 847-866-3000. In the United States and Canada, call 866-9ROTARY.

ROTARY CENTERS FOR INTERNATIONAL STUDIES IN PEACE AND CONFLICT RESOLUTION

PURPOSE	Provide Rotary World Peace Fellowships to individuals pursuing a master's degree program in international relations, peace, conflict resolution, and related subjects or professional development certificate in peace and conflict studies 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 an unlimited number of qualified applications to TRF by 1 July for world-competitive selection. Check with the district Rotary World Peace Fellowships chair for each district's deadline.
CRITERIA FOR SUCCESS	<p>Candidates should have</p> <ul style="list-style-type: none"> ▶ Appropriate undergraduate degree to gain entrance to the proposed Rotary Centers master's degree or certificate program ▶ Work or service experience in relevant fields ▶ A demonstrated commitment to peace and international understanding <p>See www.rotary.org for complete criteria.</p>
DECISION	Up to 60 master's degree and 50 professional development certificate fellows selected annually on world-competitive basis. 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 or call 847-866-3000. In the United States and Canada, call 866-9ROTARY.

GROUP STUDY EXCHANGE

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 focus, 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 DDF to send a GSE team in any program year. The *SHARE* cost for one district to send a GSE team using DDF in 2009-10 is \$11,000 (or \$6,000 for a Neighboring Country GSE). In 2010-11, these costs will change to \$13,000 (or \$7,000 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 available from World Fund:

- ▶ 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, additional World Fund assistance includes

- ▶ Up to \$600 to defray the cost of transport within the district for the visiting GSE team
- ▶ An additional \$2,500 subsidy to multicountry low-income districts for transport of a visiting GSE team between countries within the district

APPLICATIONS

Districts submit the following applications:

- ▶ *Group Study Exchange District Application* (Web only)
- ▶ *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 45 days before departure date or TRF may cancel or postpone the GSE. Check with the district GSE subcommittee chair for each district's 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, lineal descendants, or stepchildren (whether legally adopted or not) of Rotarians

The Rotarian team leader cannot be the district governor, immediate past governor, or governor-elect, nor the spouse, lineal descendant or stepchild (whether legally adopted or not) of any of the aforementioned officers, 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 www.rotary.org for complete criteria.

DECISION

Districts receive pairing confirmation by 31 January or before the International Assembly

E-mail questions to contact.center@rotary.org or call 847-866-3000. In the United States and Canada, call 866-9ROTARY.

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 and 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.

Reconnections (128-EN). Semiannual bulletin for Rotary Foundation alumni highlights outstanding achievements and news of former program participants.

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 Alumni (092-EN). Highlights employment of Rotary Centers alumni with international organizations and governments. Alumni are featured by region.

Peace Is Possible (829-DVD). Six-minute video explains the Rotary Centers for International Studies and the Rotary World Peace Fellowships program as well as their history, vision, and objectives.

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

Rotary Foundation alumni are the more than 105,000 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.

Rotary Foundation alumni associations are the chapters of the Rotary Foundation Alumni Network. A Rotary Foundation alumni association is a group of Rotary Foundation alumni bound by a given geographic area or common tie who unite to pursue service and fellowship. There are 68 active alumni associations worldwide, and the number is growing every day.

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.

Foundation Funding

ANNUAL PROGRAMS FUND

PURPOSE	Provides the necessary funding for operation of Foundation programs. Visit www.rotary.org 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">▶ 50 percent of the original contribution is returned to the district through the DDF.▶ 50 percent of the original contribution is provided to the World Fund to support Foundation programs and includes one Group Study Exchange per district every year.▶ Investment earnings support administrative costs and may be used to benefit the Foundation's programs.
RECOGNITION	Contributions to the Annual Programs Fund count toward Rotary Foundation Sustaining Member Recognition, Paul Harris Fellow Recognition, Multiple Paul Harris Fellow Recognition, Paul Harris Society, and Major Donor Recognition.

PERMANENT FUND

PURPOSE	Ensures the long-term viability of TRF and its programs. Spendable earnings from this endowed fund enable TRF to expand existing programs and underwrite new programs. Visit 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	<ul style="list-style-type: none">▶ 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 commitment of \$10,000 or more in their final estate plan are eligible to receive Bequest Society recognition. Outright contributions to the Permanent Fund count toward Major Donor recognition.

WHERE DO I SEND MY CONTRIBUTION?

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
Witikonerstrasse 15
CH-8032 Zurich
Switzerland

Great Britain and Ireland

RI in Great Britain and 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 and Philippines

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

Japan

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

Korea

Rotary International
Room 705, Miwon Building.
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

PURPOSE	Acknowledges the financial support generously provided by individuals. Visit www.rotary.org for additional information.
TYPES	Rotary Foundation Sustaining Member (\$100) Paul Harris Fellow (\$1,000) Multiple Paul Harris Fellow (\$2,000-\$9,999) Paul Harris Society (\$1,000 annually — district-administered) 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 contact.center@rotary.org or call 847-866-3000. In the United States and Canada, call 866-9ROTARY.

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.

Every Rotarian, Every Year Newsletter. Free subscription at www.rotary.org/newsletters

Every Rotarian, Every Year DVD (978-MU). Inspirational nine-minute overview of Foundation programs and grants supported by the Annual Programs Fund.

Paul Harris Society Brochure (099-EN). Promotes the district-administered Paul Harris Society program which recognizes donors who make a commitment to contribute \$1,000 or more annually to the Annual Programs Fund, PolioPlus, or Humanitarian Grant programs.

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

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

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 their specific contributions. The district uses the remaining 50 percent of DDF 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. Clubs can access these funds through the district Rotary Foundation committee.

THE SHARE 3-YEAR CYCLE

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 or call 847-866-3362.

Future Vision Plan for The Rotary Foundation

The Rotary Foundation is currently engaged in a strategic planning process to transform its grant-making activities. The plan calls for a new grants structure, with two kinds of grants:

1. District Grants, which will be similar to District Simplified Grants, will provide simplicity, flexibility, and opportunities for innovation. Clubs and their district work together to fund smaller educational or humanitarian activities and projects. Projects and activities should support the mission of The Rotary Foundation, which allows a broad range of choices for clubs and districts. District grants are intended to make it easier for clubs and districts to readily access funds and complete the projects and activities they are interested in. District grants will require simplified reporting to the Foundation.

2. Global Grants will support larger projects and activities and will offer opportunities to participate in more strategically focused, sustainable activities. Global grants will be awarded in six areas of focus:

Peace and conflict prevention and resolution

Disease prevention and treatment

Water and sanitation

Maternal and child health

Basic education and literacy

Economic and community development

Within global grants, there will be two options:

Club- and district-developed projects similar to larger Matching Grants and 3-H grant projects, GSEs, and Ambassadorial Scholarships. Both humanitarian and educational activities must meet a minimum award amount of \$15,000, and the grant activity must relate to one of the six areas of focus. The Foundation will match contributions submitted by clubs and districts. In order to fully fund the activity, cash contributions are matched at 50 percent and DDF contributions are matched at 100 percent.

Packaged grants that can be coordinated with a strategic partner. The Foundation will work to provide projects and activities that have a standardized approach to creating, implementing, monitoring, and reporting. It is anticipated that packaged grants will be funded entirely by the World Fund or in coordination with the strategic partner.

Approximately 100 districts will participate in a three-year pilot to test the new grants structure beginning in 2010. All clubs and districts will begin using the new structure starting in 2013-14.

Learn more about the Future Vision Plan and get the latest information at www.rotary.org/futurevision.

E-mail questions to newgrantspilot@rotary.org.

GENERAL 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: 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 CONTACT CENTER

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

ZONE RESOURCES

The Regional Rotary Foundation Coordinators (RRFCs) are responsible for the overall promotion of programs and fundraising for the Foundation in their zone or area. RRFCs train their zone team and the district leadership in setting and achieving fundraising and program goals in their assigned districts.

The members of the RRFC team are the Assistant RRFCs, a Rotary Foundation Alumni Coordinator (RFAC), and a Polio Zone Challenge Coordinator (ZCC). Each team member is a great resource for TRF information for Rotary club and district leaders.

Assistant RRFs are appointed to help the RRFs with all aspects of The Rotary Foundation, ranging from helping districts to achieve their annual giving goals through Every Rotarian, Every Year, to helping solicit major gifts of US\$10,000 or more, to assisting districts with educational programs and humanitarian grants.

The Rotary Foundation Alumni Coordinator encourages Rotary clubs and districts to involve Foundation alumni in Rotary activities, consider alumni as potential members of Rotary and potential contributors to the Foundation, and use alumni as effective advocates for Foundation programs.

Zone team members are great speakers and trainers at regional, district, and club Foundation events.

DISTRICT 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 must 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 chair. 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. These subcommittee chairs are appointed annually by the district governor whom they will serve. Please direct any questions regarding the DRFC chair three-year term policy to TRF.administration@rotary.org.

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 Subcommittee
Chair _____

Scholarships
Subcommittee Chair _____



The Rotary Foundation of Rotary International

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