



Part I: Our Foundation



Prior to the Session

1. Familiarize yourself with the terms associated with The Rotary Foundation.
2. Collect materials needed for session including Post It notes (3 assorted colors, newsprint, colored copy paper).
3. Distribute Post It notes so that all participants have access to all three colors.
4. Prepare index cards and newsprint for first activity (Open Discussion).
5. Access the Object of Rotary for reference.
6. Review Rotary News Inserts OF-1A, OF-1B and OF-1C.
7. Print of graphic illustration of the Seven Areas of Focus.
8. Draw the pot, flames and logs needed for Graphic Listing Exercise on newsprint.
9. Prepare fun, unique ways to create partners and groups.

Session Goals

Understand the basic goals, programs and financing of The Rotary Foundation

Discuss the importance and value of The Rotary Foundation to your club

Materials

Insert OF-1: "Good to Know" Information for Our Foundation

Insert OF-1A-C: Rotary News

Insert OF-2: Rotary Foundation Grants and Related Programs

Insert OF-3: Foundation Facts - Giving

Begin the Session

- Introduce yourself and session.
- Orient to the materials.
- Review Session Goals, where this course fits into the Service curriculum of RLI.
- Point out referenced materials and where they can be found and disclaimer "consult your district for specific Rotary foundation training and information."

Warm-up – Telephone Game

- Distribute Post Its to each participant.
- Announce that the first contribution to The Rotary Foundation was \$26.50.
- Have each participant "guess" at the value of \$26.50 in today's dollars and put their best guess on the Post Its notes.
- Go around the room in Round Robin style and record the participants "guesses" on newsprint.
- Announce that \$26.50 in 1908 is equivalent to \$915.03 in 2025.



Brief Discussion – Where it all began (limit discussion to 5 minutes)

- Conduct a brief discussion about the beginning of The Rotary Foundation including the following points.
 - Charitable arm of Rotary.
 - Arch Klumph established in 1917.
 - Grown to over \$5.5 billion.
 - Mission is “To Do Good in the World”.

Open Discussion

Put the following words or phrases on index cards; one on each card. (RI – Board of Directors; Non-profit 501c4; Membership Pays Dues; Club dues supports RI, District, Club Activities and Service; Motto – Service Above Self; TRF – Board of Trustees; Charitable 501c3; Funded through Donations; Annual fund Donations funds Grants; Areas of Focus prioritize World Needs; Mission – Doing Good in the World). Distribute the cards at random to participants.

Prepare two newsprints – one titled ROTARY INTERNATIONAL and the other titled ROTARY FOUNDATION.

- Have participants put their cards under the appropriate heading.
 - Go through each card and move it to the ‘right’ heading if necessary.
 - Use as kick off for discussion about The Rotary Foundation.
- All foundations have a specific mission – The mission of **The Rotary Foundation** is to Do Good in the World.
 - The mission of **The Rotary Foundation** is the same as the mission of **Rotary International** which is the **Object of Rotary**.
 - Refer to the **Object of Rotary** (ROR-3): to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education and the alleviation of poverty.
 - Introduce the **Seven Areas of Focus**. All projects funded through The Rotary Foundation must focus on one or more of the **seven** areas of focus.
 - That includes direct funding, collaborations, district grants, and district designated funds.



- Rotary International and The Rotary Foundation are separate entities. Why?
 - Legally, for tax purposes, the two groups must have different supervision and management structures.
 - The Rotary Foundation is a 501c3 charitable organization; Rotary International is a 501c4. Legally the different designations have different guidelines under which the organizations must operate.
 - Contributions to The Rotary Foundation are tax-exempt. Dues to Rotary International are not.

Case Studies – Rotary News Inserts

- Divide participants into three (3) small groups.
- Show group where the cases are in the participant manual. (OF-1A-C)
- Assign each group one of the cases.
- Have the groups read the case study and discuss amongst each other the three questions at the end of each case.
 - Why ENGAGE this project?
 - Why now?
 - Why Rotary?

NOTE: If the number of participants in this session is small, consider dividing the group in half with each group taking one case study, or choose one case and have the whole group work together on it.

Another alternative would be to cover two cases with the entire group in open discussion.

Prompt 1 – There are so many problems and unmet needs in communities around the world. Let's review a few of these situations and how Rotary is helping. After your review, discuss the three questions posed and be prepared to share what you discussed in the context of your case study. You have about 10 minutes to discuss.

- Allow 10 minutes for group discussion.



Prompt 2 – Take a few minutes to refine your thoughts on each of the three questions into one concise sentence each. We'll hear your ideas in about two (2) minutes.

- Debrief case studies using a 3-column chart with the questions heading the columns and each case study heading the rows A-C.
- Facilitator will note key words from debrief in the chart.

	This Project?	Why Now?	Why Rotary?
A			
B			
C			

- Highlight common themes or other insights from the debrief, including but not limited to:
 - Rotarians, through their worldwide network of clubs are uniquely able to generate financial, people, and partnership resources to meet needs.
 - Rotarians, each club being local, is best situated to know community needs, get community involved, and “put boots on the ground” to engage a problem.
 - Rotarians, by creating a “Foundation for Doing Good in the World,” have built a structure to meet needs that would be difficult for clubs or individuals to do on their own.
 - Rotarians have prioritized needs using the **seven** “Areas of Focus.”
 - “If not us, who? If not now, when?” – Jewish Scholar Hillel the Elder, First Century BCE, often quoted by John F. Kennedy.
- Discuss WHY GIVE? to The Rotary Foundation. (Without a reason to give, everything else is unimportant.)
 - Multiplier effect – individual contributions combine to realize impacts that no one individual could have.
 - Rotarians’ pledge to “Do Good in the World” increased by impact The Foundation can have.
 - Encourage participants to peruse the Rotary Foundation website - <https://www.rotary.org/en/about-rotary/rotary-foundation> to discover how TRF lives up to its promise.



Graphic Listing Exercise

- Draw a simple pot on top of burning from logs on newsprint or whiteboard.



Prompt 3 – On separate Post It notes write down three current or past projects your club has done. Bring your club projects up to the board and post them.

- Ask questions as needed about each project to determine if it has a Rotary Foundation connection.
- Move those related to the Rotary Foundation into the pot or spilling out of the top. Non-Rotary Foundation supported projects can remain on the side.

Debrief

- What is the fuel that fires The Rotary Foundation?
 - Logs = Funding.
 - All funding of Rotary Foundation projects comes from the gifts of Rotarians.
 - Funding will be addressed more in Part II: Targeted Service session.
- What is the spark that these Rotary Foundation projects need to cook?
 - Fire = YOU = Rotarians.
 - Supporting projects with the funding and more importantly, participation from Rotarians.
- Looking at the other projects on the board, could some of them be Rotary Foundation supported? How?
 - Primarily with District Grants.
 - Involvement of Foundation Alumni.



Reflection

- Summarize and relate back to goals.
- End with following Prompt.

**Prompt 4 – How does The Rotary Foundation help you “Do Good in the World”?
How do you help The Rotary Foundation “Do Good in the World”?**

Part II: Targeted Service will explore the Grant Model and funding of our Foundation – we will see you there!



ROTARY'S AREAS OF FOCUS



Foundation Giving and Recognition Terms	Annual Fund	Endowment Fund
"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 rd year	"Rotary's Endowment" 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 Rotary's Endowment
"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 Rotary's Endowment
"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-1: “Good to Know” Information for Our Foundation

- “TRF” - The Rotary Foundation, the foundation associated with Rotary that "does good in the world". Governed by a nominated Board of 15 Trustees, all volunteers.
- The idea for the Rotary Foundation was planted in 1917 at the Atlanta, Georgia RI Convention where RI President Arch Klumph proposed a "foundation for doing good in the world". It was funded by a \$26.50 donation from the Rotary Club of Kansas City, Mo USA. TRF was formally named in 1928.
- Significant financial support of TRF did not occur until memorial gifts were made after Rotary's founder, Paul P. Harris' death in 1947. The "Paul Harris Fellow" was established in 1957.
- No portion of your RI dues go to TRF. All donations by Rotarians to TRF are voluntary. Many Rotarians support our Foundation by club giving or direct giving online through “TRF Direct.”
- TRF can be financially supported in many ways by Rotarians, and different recognitions are available for that support. See Rotary’s Areas of Focus chart for the details.
- TRF has an "Annual Fund" (like a checking account) and "Rotary’s Endowment” (formerly “Permanent Fund” (like a savings account).
- TRF Programs include numerous Grant programs, Scholarship programs, Peace Fellows, Vocational Training Teams (VTTs), and its Polio Eradication Campaign.
- Rotary "Areas of Focus" to build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever are: (1) Promoting peace, (2) Fighting disease, (3) Providing clean water, sanitation and hygiene, (4) Saving mothers and children, (5) Supporting education, (6) Growing local economies, and (7) Protecting the Environment.
- Rotary launched its PolioPlus Program targeting worldwide polio eradication in 1985 after a successful grant project eliminated polio in the Philippines.
- Rotary co-founded the Global Polio Eradication Initiative (GPEI) in 1988 with WHO, CDC, UNICEF, The Bill & Melinda Gates Foundation, and world governments.
- Rotary has raised over \$2.1 Billion Dollars, to immunize over 3.0 billion children in 122 countries and is a leader in polio advocacy efforts.
- At printing, polio cases have been reduced by 99.9% and are endemic in only two countries.
- We are "this close" to eradicating polio worldwide.

Insert OF-1A: Rotary News:

Rotary and Partners “this close” to Eradicating Polio Worldwide

Kabul, Afghanistan – January 1

– 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 99.9% reduction in cases since the 1980s, fewer than 17 cases reported in 2018, and only 2 polio endemic countries left, conflict-ridden Afghanistan, and Pakistan. Over 3.0 billion children in over 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



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

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 30 years club members have donated their time and 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 \$2.1 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 \$16 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.*

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.



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.

“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, 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 an 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]besides 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 peacemakers 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:

Cambodia's Children "Waste-Pickers" Receive Vital Services

Phnom Penh, Cambodia – February 12. 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. Over time, 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 President of the Society for Science & the Public and publisher of Science News, Maya stepped down from her position as



president of GFC to teach at Duke University and Johns Hopkins, having grown her initial vision into a thriving global organization. GFC has awarded more than \$43 million to more than 700 organizations in over 80 countries, touching the lives of over 10 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 goodwill among the peoples of the world. Credits: CSARO/GFC

1. Why Engage this Project? 2. Why Now?

3. Why Rotary?



Insert OF-2: Rotary Foundation Grants and Related Programs

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

District grants

District grants are funded by The Rotary Foundation solely with allocations from the District Designated Fund (DDF). A district may apply for a single grant each Rotary year to support one or more projects using up to 47.5 percent of its SHARE allocation, which represents 50 percent of its annual giving from the previous three years plus any Endowment SHARE earnings. These grants are used to support district and club sponsored activities, including vocational training teams, scholarships, humanitarian service projects and cultural exchanges that align 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 grants have a minimum budget of \$30,000 and maximum World Fund award of \$400,000. Grant sponsors can use a combination of District Designated Funds (DDF), cash, and/or directed gifts and endowment earnings to fund a global grant. The Foundation will provide an 80 percent World Fund match for all DDF contributions. There is no minimum World Fund match. Sponsors also have the option of financing global grants without a World Fund match using any combination of cash, DDF and/or directed gifts and endowment earnings to reach a minimum budget of \$30,000.

Grant sponsors may contribute cash toward a global grant, but it will not be matched by the Foundation. Non-Rotarian contributions may also be added to a grant, as long as they don't come from a cooperating organization, a project supplier or vendor, or someone who benefits from the grant. Non-Rotarian contributions will not be matched by The Rotary Foundation.

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. Work with your district international service committee chair and other district leaders to improve the global grant planning process and development of project partnerships to improve the quality, impact, and sustainability of your global grants. Connect with local Rotarian and Rotary alumni experts who can offer valuable guidance early in the planning process.



Editor's Note: Each District is different. Districts have resources available to help with Grant planning, qualification, applications, execution, and reporting. Contact your District Rotary Foundation Chair for more information and appropriate referrals.

Reprinted from Terms and Conditions for District and Global Grants found at <https://my-cms.rotary.org/en/document/terms-and-conditions-rotary-foundation-global-grants>.



Insert OF-3: Foundation Facts - Giving

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

PROGRAMS

(All figures are as of 30 June 2022 and in U.S. dollars.)

PolioPlus

Since 1988, Rotary and our partners have immunized nearly 3 billion children against polio. As of June 2022, Rotary had committed more than \$2.3 billion to global polio eradication. We're still working to eliminate the wild poliovirus in the last two countries where it remains endemic and to ensure that it does not return elsewhere. **In 2021-22, program awards, including PolioPlus Partners grants, totaled \$150.5 million.**

Rotary Peace Centers

Each year, the Foundation supports the training of peace fellows at Rotary Peace Centers, where they earn master's degrees or professional development certificates. Since 2002-03, 1,600 fellows from more than 140 countries have participated. **In 2021-22, 130 fellows from 57 countries began their studies at the Rotary Peace Centers, and program awards for the fellows and centers totaled \$3.9 million.**

District grants

District grants support small-scale, short-term projects related to the Foundation's mission. **In 2021-22, the Foundation approved 478 district grants, and program awards totaled \$27.2 million.**

Global grants

Global grants fund large-scale international activities with sustainable, measurable results that support Rotary's areas of focus. Activities include humanitarian projects, scholarships, and vocational training teams. **In 2021-22, the Foundation approved 1,199 global grants, and program awards totaled \$72.7 million.**

Disaster response grants

Rotary's disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months. **In 2021-22, the Foundation approved 207 disaster response grants, and program awards totaled \$7.8 million.**

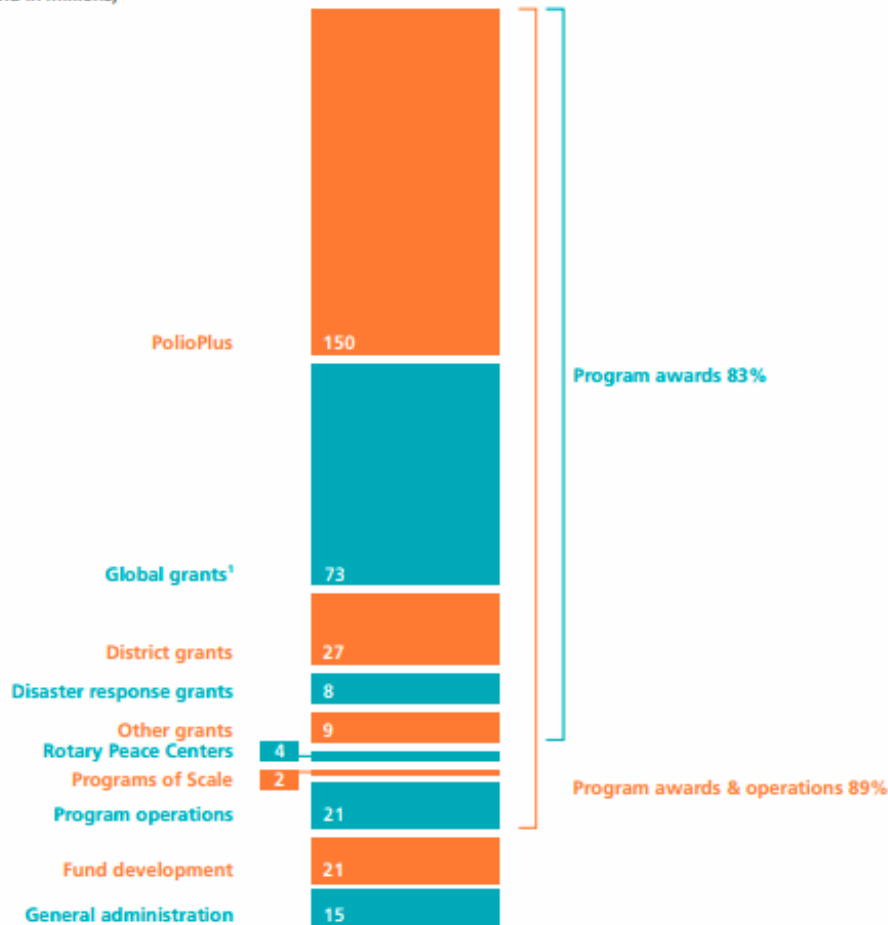
Programs of Scale grants

Programs of Scale grants empower Rotary members to work with experienced partners to implement large-scale, high-impact projects over three to five years to benefit a large number of people. **Based on a model that has succeeded in reducing the maternal and neo-natal mortality rate in Nigeria, the member-led Together for Healthy Families in Nigeria program was awarded the 2021-22 grant of \$2 million, which was matched by \$4 million in funding from our partners.**



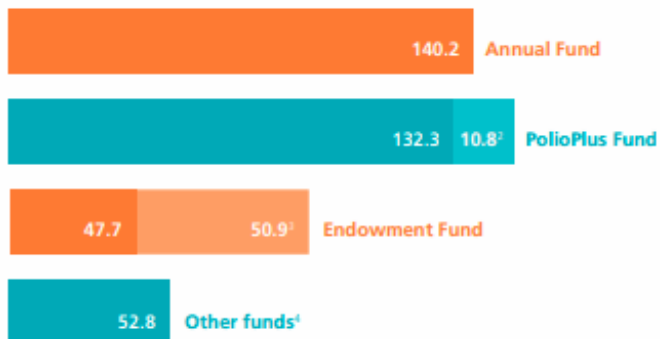
2021-22 TOTAL EXPENDITURES: US\$330.4 million

(rounded and in millions)



2021-22 TOTAL CONTRIBUTIONS: US\$434.7 million

(rounded and in millions)



¹ Net of returned funds and other adjustments
² Polio transfers
³ Total new commitments to the Endowment Fund
⁴ Includes cash contributions to global grants, the Disaster Response and donor advised funds, and directed gifts



SUMMARY STATISTICS

Contribution summary	2021-22	All-time contributions
Annual Fund	\$140.2 million	\$3.2 billion
Endowment Fund	\$47.7 million	\$494.6 million
PolioPlus Fund	\$132.3 million	\$2.0 billion
Other*	\$52.8 million	\$380.5 million
Total outright contributions	\$373.0 million	\$6.1 billion
Total new commitments to the Endowment Fund	\$50.9 million	\$924.0 million
Polio transfers**	\$10.8 million	-
Grand total	\$434.7 million	-
Program awards & operations	\$294.1 million	Since 1947: \$5.55 billion

Totals are rounded and in U.S. dollars.

* Cash contributions to global grants, directed gifts, and contributions to the donor advised fund

** District Designated Fund transfers and the resulting World Fund match to PolioPlus, affinity card royalties, and donor advised fund transfers to PolioPlus

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