

THE ROTARY FOUNDATION  
**REFERENCE  
GUIDE**



# CONTENTS

<b>PolioPlus</b>	<b>1</b>	<b>Foundation Funding</b>	<b>9</b>
PolioPlus grants	1	Annual Fund-SHARE	9
PolioPlus Partners grants	1	Disaster Response Fund	10
Resources	2	Endowment	10
<b>Rotary Peace Fellowships</b>	<b>3</b>	Ways to give	11
Resources	3	Resources	14
<b>Grants</b>	<b>4</b>	<b>Foundation Recognition</b>	<b>16</b>
District grants	4	Individual recognition	16
Global grants	4	Club recognition	20
Disaster response grants	5	Foundation recognition	
Areas of focus	6	points	22
Qualification and		Resources	23
stewardship	6	<b>General Resources</b>	<b>24</b>
Grant application process	6	My Rotary	24
Reporting	7	Where to direct questions	27
Resources	7	District and zone	
<b>Rotary Alumni</b>	<b>8</b>	resources	27
Resources	8	Contributions by mail	28

All figures are in U.S. dollars.

# THE ROTARY FOUNDATION

The mission of The Rotary Foundation is to enable Rotary members to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. The Foundation is a not-for-profit organization supported solely by voluntary contributions from Rotary members and friends of the Foundation who share its vision of a better world. This support is essential to make possible projects, funded with Foundation grants, that bring sustainable improvement to communities in need.



# POLIOPLUS

Polio eradication is Rotary's top philanthropic priority. Rotary launched the PolioPlus program in 1985. In 1988, when Rotary began working with its partners in the Global Polio Eradication Initiative, there were more than 350,000 polio cases in over 125 countries. Since then, nearly 3 billion children have been immunized against polio, and the incidence of polio has decreased 99.9%.

As of 2020, Rotary's contributions to the global polio eradication effort, including matching funds from the Bill & Melinda Gates Foundation, exceeded \$2 billion.

## POLIOPLUS GRANTS

PolioPlus grants fund global polio eradication efforts in countries where polio is endemic and those at risk for the disease. Grants support immunization campaigns and monitoring of poliovirus transmission.

PolioPlus grants are funded from the general PolioPlus Fund and District Designated Fund contributions.

Grant proposals are submitted primarily by major implementing partner agencies, such as the World Health Organization and UNICEF. Foundation Trustees consider PolioPlus grant requests at regularly scheduled meetings.

## POLIOPLUS PARTNERS GRANTS

PolioPlus Partners grants support urgent social mobilization and surveillance projects, which are submitted by the national PolioPlus committee chairs in high-priority countries. The grant applications are considered on a rolling basis and are funded from the general PolioPlus Fund.

## POLIOPLUS RESOURCES

- **End Polio Now newsletter:** Updates and news about polio eradication efforts, published every other month
- **End Polio Now poster:** Features the End Polio Now logo and graphics
- **End Polio Now pins:** Lapel pins with the End Polio Now logo
- **Top 5 Reasons to Eradicate Polio flyer:** Features the top reasons to achieve a polio-free world

For more information and resources, visit [endpolio.org](https://endpolio.org).

# ROTARY PEACE FELLOWSHIPS

Rotary Peace Fellowships enable individuals to pursue either a graduate degree in peace-related fields such as international development, peace studies, or conflict resolution, or a professional development certificate in peace and conflict studies, at one of the seven Rotary Peace Centers.

Fellowships cover tuition and fees, room and board, round-trip transportation, and all internship and field-study expenses. Fellowships are supported by a pool of funds contributed by districts from their District Designated Fund, through term gifts, Rotary's Endowment Fund, and the World Fund.

Districts can endorse an unlimited number of qualified candidates at no cost by 1 July for world-competitive selection. Candidates must submit their applications to their district by 31 May, which gives the district time to review the application, interview the candidate, and submit the online endorsement to The Rotary Foundation. Up to 50 master's degree and 80 professional development certificate fellows are selected annually. Trustee-approved candidates are notified by 15 November.

## ROTARY PEACE FELLOWSHIPS RESOURCES

- **Peace in Action:** Newsletter with updates and news about Rotary Peace Fellowships, published every other month
- **Certificate postcard:** Information about certificate programs and centers
- **Master's postcard:** Information about master's programs and centers
- **Rotary Peace Fellowships presentation:** Overview of Rotary Peace Centers programs
- **Rotary Peace Centers: Making Peace a Reality brochure:** Overview of the Rotary Peace Centers and naming opportunities
- **Become a Peacebuilder District:** How districts can support peace fellowships

For more information and resources, visit [rotary.org/peace-fellowships](https://rotary.org/peace-fellowships).

# GRANTS

The Rotary Foundation offers grants that support a wide variety of projects, scholarships, and training undertaken by Rotary members around the world.

## DISTRICT GRANTS

District grants are block grants that enable clubs and districts to address needs in their communities and abroad. Districts may request up to 50% of their District Designated Fund for one grant annually (see Annual Fund-SHARE on page 9) to support district- and club-sponsored activities, including vocational training teams, scholarships, humanitarian service projects, and youth programs 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 graduate and postgraduate scholarships that have sustainable, measurable outcomes in one or more of Rotary's areas of focus (see page 6).

Sustainability means different things to different organizations. For The Rotary Foundation, sustainability means providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends.

Global grant projects have a minimum budget of \$30,000. Grant sponsors can use a combination of District Designated Funds (DDF), cash, and directed gifts and endowment earnings to fund a global grant.



The Foundation will provide a 100% World Fund match for all DDF contributions. The maximum World Fund match is \$400,000; there is no minimum.

Cash contributions are no longer matched by the World Fund, but they can still help finance global grants. Global grant sponsors need to add 5% to their global grant cash contributions to pay the expenses associated with processing those donations. All global grants must be sponsored by two clubs or districts: a host sponsor in the country where the activity takes place and an international sponsor outside that country.

When planning a global grant project to support a humanitarian project or a vocational training team, sponsors must conduct a thorough [community assessment](#) that explores the pressing concerns in the project location as well as community resources available to address them. The assessment [results](#) should inform the project design and need to be included in the grant application. Local Rotarian and Rotary alumni experts can offer valuable guidance early in the planning process.

## DISASTER RESPONSE GRANTS

Rotary disaster response grants support relief and recovery efforts in areas affected by natural disasters within the past six months. Qualified districts in affected areas may apply for grants of up to \$25,000, based on the availability of funds. Districts may apply for additional grants after they report on any previous disaster response grants. Grant funds can be used to provide basic items such as water, food, medicine, and clothing. Districts that request help are responsible for determining the needs in communities affected by disaster. They should work closely with local officials and community groups to ensure that the funding meets those needs.

## AREAS OF FOCUS

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

- Peacebuilding and conflict prevention
- Disease prevention and treatment
- Water, sanitation, and hygiene
- Maternal and child health
- Basic education and literacy
- Community economic development

Read about the specific goals of the areas of focus in the [Areas of Focus Policy Statements](#).

## QUALIFICATION AND STEWARDSHIP

### What districts must do

To participate in grants, districts must complete an online qualification process in which they agree to follow and implement the financial and stewardship guidelines in the [district memorandum of understanding](#). Each district must also conduct a [grant management seminar](#) as part of the qualification process for clubs.

### What clubs must do

Clubs must complete an annual qualification process to be eligible for global grants. To qualify, clubs must send one or more members to the district's grant management seminar, sign and adhere to the [club memorandum of understanding](#), and fulfill any additional qualification requirements set by the district.

## GRANT APPLICATION PROCESS

Once they are qualified, clubs and districts may submit district and global grant applications through the [Grant Center](#). Applications for global grant scholars who will begin studies in August, September, or October must be submitted to the Foundation by 30 June. Applications involving travel need to be submitted 90 days before the travel dates.

To apply for disaster response grants, the district governor and district Rotary Foundation chair complete the [Rotary Disaster Response Grant Application](#) and send it to [grants@rotary.org](mailto:grants@rotary.org).

## REPORTING

Final reports that document the disbursement of district grant funds must be submitted to the Foundation within 12 months of when sponsors receive the payment, or within two months of the last grant money being disbursed. Global and disaster response grant sponsors need to send in a first progress report within 12 months of receiving the first grant payment. After that, progress reports are due within 12 months of the acceptance date of the previous report. Final reports need to be submitted within two months of completing the project. District and global grant reports are submitted through the [Grant Center](#). Disaster response grant [reports](#) are sent to [grants@rotary.org](mailto:grants@rotary.org).

## GRANTS RESOURCES

- [Giving & Grants](#): Quarterly newsletter with information about fundraising and grants
- [A Guide to Global Grants](#): Resource for clubs and districts on managing global grants
- [Grant Management Seminar Learning Plan](#): Series of nine online courses in Rotary's Learning Center that equip clubs and districts to apply for and manage global grants
- [Community Assessment Tools](#): Tips and resources for clubs as they conduct their community assessments
- [Project Enhancement Frequently Asked Questions](#): Resource on leveraging local expertise and accessing resources to improve global grant projects
- [Project Lifecycle Resources](#): Tools to assist with global grant projects every step of the way
- [Terms and Conditions for Rotary Foundation District Grants and Global Grants](#)
- [Areas of Focus Policy Statements](#)

# ROTARY ALUMNI

The Rotary Foundation has a proud history of providing funding for more than 130,000 participants in its various scholarships and vocational exchanges. Rotary considers former participants in Rotaract, Interact, Rotary Youth Exchange, Rotary Youth Leadership Awards (RYLA), and other local and regional scholarships and programs to be alumni, too.

As talented, committed individuals, alumni know Rotary well and share its vision of furthering world understanding and peace. They're powerful advocates for Rotary because they put a human face on Rotary activities and demonstrate a commitment to the world community. They serve as volunteers for local and international service projects and are potential Rotary members and Foundation donors. They are also available to speak at Rotary functions. Contact your district alumni chair to find alumni available to engage in club activities.

## ALUMNI RESOURCES

- [Rotary Alumni Association of the Year nomination form](#)
- [Rotary Alumni Association of the Year recipients brochure:](#)  
Describes past winners of this award
- [Rotary Alumni Global Service Award nomination form](#)
- [Rotary Alumni Global Service Award recipients brochure:](#)  
Describes past winners of this award
- [Alumni Association Frequently Asked Questions:](#) Covers basic information about Rotary alumni associations
- [Alumni toolkit:](#) Provides information for all Rotarians who work with alumni

For more information and resources, visit [rotary.org/alumni](https://rotary.org/alumni) or email [alumni@rotary.org](mailto:alumni@rotary.org).

# FOUNDATION FUNDING

The Rotary Foundation transforms your gifts into projects that change lives both close to home and around the world. As the charitable arm of Rotary, we tap into a global network of Rotarians who invest their time, money, and expertise in Foundation [priorities](#), such as [eradicating polio](#) and [promoting peace](#).

## ANNUAL FUND-SHARE

Annual Fund-SHARE is the primary source of funding for a broad range of local and international Rotary Foundation activities.

Every Rotarian, Every Year (EREY) is the fundraising initiative designed to encourage support for the Foundation's Annual Fund. EREY asks every Rotary member to:

- Contribute to the Annual Fund every year
- Participate in a Foundation grant or program every year

Through Annual Fund-SHARE, contributions are transformed into grants that change lives.

Contributions to Annual Fund-SHARE are divided as follows:

- Fifty percent is credited to the World Fund.
- Fifty percent is credited to the District Designated Fund.

The Foundation uses the World Fund portion to pay for the worldwide grant and program opportunities available to all Rotary districts. Your district uses the District Designated Fund (DDF) portion to fund the Foundation grants and programs of its choice.

The Rotary Foundation's funding cycle makes district contributions available for use three years after they are received. The three-year cycle gives districts time to plan projects and activities and allows the Foundation to invest the contributions. For instance, 50% of the contributions received during 2020-21 are available for spending in 2023-24.

Your district Rotary Foundation committee decides how to use the DDF in consultation with the clubs in the district. Districts may use up to 50% of their fund (which might also include spendable earnings from

gifts to Endowment Fund-SHARE) for a district block grant. Districts may use any amount of their DDF for global grants or donations. Donation options include PolioPlus, peacebuilding programs, pooled endowed funds, the World Fund, Disaster Response Fund, or another district.

DDF empowers your district to undertake the projects that are most important to Rotarians in your area. Contributions to Annual Fund-SHARE provide DDF for the future. Therefore, clubs and districts should set and review fundraising goals in Rotary Club Central to track and increase the financial resources available to you for Rotary Foundation grants and activities.

In addition to SHARE, donors may direct their Annual Fund contributions to the World Fund or to any of the Foundation's areas of focus. Annual Fund contributions directed to the World Fund or an area of focus are credited toward a club's annual giving goal and per capita giving, but they do not generate DDF. All Annual Fund contributions count toward Every Rotarian, Every Year; Rotary Foundation Sustaining Member; Paul Harris Fellow; Paul Harris Society; Major Donor; and Arch Klumph Society recognition. They also count toward club recognition opportunities.

Annual Fund-SHARE contributions are the primary source of funding for Foundation grants and are strongly encouraged.

## **DISASTER RESPONSE FUND**

The Rotary Disaster Response Fund can accept cash donations from individuals and clubs, as well as DDF contributions. It is a general disaster-related reserve, and contributions cannot be designated for specific events. Although it is separate from the Annual Fund, contributions to the Disaster Response Fund count toward Every Rotarian, Every Year; Rotary Foundation Sustaining Member; Paul Harris Fellow; Paul Harris Society; Major Donor; and Arch Klumph Society recognition. They also count toward club recognition opportunities.

## **ENDOWMENT**

The Rotary Foundation Endowment ensures that future Rotarians have the resources needed to design and implement sustainable projects year after year. The principal of gifts to the Endowment is never spent, but the spendable earnings generated on the principal are directed annually to Foundation grants and programs.

The following types of contributions can be made to the Endowment:

- Outright gifts of cash, investments, or other property
- Life income gifts (for example, charitable remainder trusts, charitable gift annuities, pooled-income funds)
- Testamentary gifts through wills or estate plans
- Beneficiary of life insurance, retirement plan accounts, or other financial accounts

## WAYS TO GIVE

### Making a contribution

Contributions to The Rotary Foundation may be made by credit card at [rotary.org/donate](https://rotary.org/donate). You can also give by check or wire transfer, or through your Rotary club, using [The Rotary Foundation Contribution Form](#) available at My Rotary. Club officers who sign in to My Rotary can make online gifts for their club or its members. See page 28 for your regional office mailing address.

Information concerning gifts of stocks, bonds, and mutual funds is available at [rotary.org/securities](https://rotary.org/securities).

With all gifts, be sure to include your member ID to ensure proper credit and recognition.

### Recurring giving (Rotary Direct)

Support Rotary's Foundation year-round by making a recurring gift with Rotary Direct. You choose how much and how often to give. It is a simple and secure way to make a big impact. [Online credit card contributions](#) can be made monthly, quarterly, or annually. Donors can also enroll using The Rotary Foundation Contribution Form, or by calling the Rotary Support Center: +1-866-9ROTARY (+1-866-976-8279) or email [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

Donors can change or cancel their recurring giving online at any time through My Rotary. After you sign in, go to Account Settings by following the link in the upper right. Then choose the Donor Self-Service tab.

### Submitting contributions for club members

Every Rotarian, Every Year encourages Rotary members to support The Rotary Foundation by making personal contributions. To simplify giving for members, many club leaders use the [Rotary Foundation Multiple Donor Form](#) to send the contributions of many individuals

together while having each person credited separately. Submitting contributions this way also generates individual tax receipts where applicable. The person who completes the multiple donor form affirms that the donors did not receive anything in exchange for their contributions and that they are eligible to receive a charitable tax benefit where applicable.

Here are some other suggestions for submitting contributions:

- Double-check the donor names and amounts.
- Acknowledge the donation and include the amount donated when you do so. Make sure that donors know what they have contributed and that they will be receiving a tax receipt (where applicable).
- Provide donor identification numbers so donors are properly credited for their gifts. For help obtaining this information, contact [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).
- A charitable contribution is a personal decision with tax implications, and the decision cannot be made without a donor's knowledge or involvement. Please do not use the multiple donor form if you are making a gift to surprise, thank, or honor someone. Instead, please refer to the memorial and tributes gifts section below.
- In some countries, such as the United States, tax codes do not permit charitable deductions for donors if they receive a benefit related to their contribution. U.S. donors should consult the latest IRS Pub 526 for information.
- Proceeds from raffles or games of chance are best submitted to The Rotary Foundation as club contributions, without assigning credit to individual members. Assigning credit to the club or district minimizes the chance that tax receipts will be issued to individuals in error.

### **Memorial and tribute gifts**

If you wish to honor or memorialize someone with a contribution to The Rotary Foundation, please go to [rotary.org/donate](https://rotary.org/donate). Select Donate, choose what you would like to support, and then select "I would like to make this donation in honor or in memory of someone." Donors will receive gift credit and a tax receipt (where applicable). The person they honor, or the family in the case of a memorial, will be notified of the gift. The process is simple, and honorees and family members can be notified by email or by a print-at-home notification.



For tax reasons, do not send funds to the Foundation in the name of anyone who did not actually provide the funds. People identified as donors could receive tax receipts without having made a contribution, which may put them and The Rotary Foundation at legal risk. Please see the Paul Harris Fellow and Foundation Recognition Points sections to learn more about extending Foundation recognition to others.

For more information, contact [memorials@rotary.org](mailto:memorials@rotary.org).

### **Employee matching gifts**

Double the impact of your gift by asking your employer to match your contribution to The Rotary Foundation. More than 15,000 companies match gifts to the Foundation, including many international corporations. Find out if your employer does at [rotary.org/matchinggifts](http://rotary.org/matchinggifts). Contact your human resources department to learn whether your company is eligible for the program.

You can send your company's matching gift form directly to us at:

The Rotary Foundation of Rotary International

Attn: Corporate Matching Gifts

1560 Sherman Avenue

Evanston, IL 60201-3698

USA

Email: [annualfund@rotary.org](mailto:annualfund@rotary.org)

Fax: +1-847-328-5260

Your employer will receive gift credit and a tax receipt (where applicable) if it chooses to contribute. Learn more about [Rotary's employee matching gift program](#).

### **Rotary credit card**

Support Rotary's efforts with the [Rotary International credit card](#). Simply by using your card, you'll be helping The Rotary Foundation do good in the world. Each new card issued and a portion of every purchase you make with the card will result in contributions toward Rotary's polio eradication initiative, at no additional cost to you. The Rotary Foundation has received more than \$8.6 million from the program since it was launched in 2000, including \$4.6 million to support polio eradication.

### **Fundraising for The Rotary Foundation on Raise for Rotary**

[Raise for Rotary](#) is a platform that allows individuals and teams to create online fundraisers that benefit The Rotary Foundation. They are a great way to celebrate personal events and special occasions.

Organizers can share their fundraisers through social media, email, and text, so family, friends, colleagues, and supporters can donate online. Raise for Rotary is available in English and U.S. currency only, but it will be released in additional languages and currencies beginning in 2021.

### **Fundraising for The Rotary Foundation on Facebook**

You can raise funds for The Rotary Foundation using Facebook. Simply select either Rotary International or End Polio Now as your nonprofit, and share it with your friends. Funds received through the Rotary International page will support the World Fund, which pays for the Foundation's most urgent needs. Those received through End Polio Now will support polio eradication.

Donations made through Facebook, as with other non-Rotary platforms, are combined and can't be credited individually by The Rotary Foundation. If you prefer to have your contributions recorded, [donate directly to The Rotary Foundation](#).

## **FOUNDATION FUNDING RESOURCES**

- **Rotary Foundation Basics:** Online course with shareable presentations that explain how Rotary's Foundation works
- **Giving & Grants:** Quarterly newsletter with information about fundraising and grants
- **Every Rotarian, Every Year brochure:** For distribution to every club member, outlining the need for Rotarians to participate in and contribute to Rotary Foundation grants and activities
- **Rotary Peace Centers: Making Peace a Reality brochure:** Overview of the Rotary Peace Centers and naming opportunities
- **Your Rotary Legacy commitment notification card:** Overview of the Endowment, legacy recognition, and naming opportunities; includes a response card that is required for recognition
- **Your Legacy, Rotary's Promise brochure:** Detailed information about the Endowment and building a legacy at the \$25,000 level or higher; features donor profiles and includes a response card to initiate recognition (limited print)

- **Rotary's Endowment:** Introduction to the Endowment and structuring a legacy and recognition opportunities; features a link to notify us of your commitment and a toolkit for district leaders
- **Planned Giving:** Resources and information to plan a gift to Rotary through your estate or financial plans
- **Rotary Club Central:** Online tool to help clubs set goals and track progress toward them throughout the Rotary year; allows club officers to select the goals that are most relevant to their clubs, focusing on six major areas: membership, giving, service projects, young leaders, public image, and the Rotary Citation
- **Rotary Foundation Multiple Donor Form:** Makes it easier for club officers to submit one large sum and list amounts contributed by each member individually
- **DDF Best Practices brochure:** Overview of the steps a district should consider when planning and implementing how to maximize its DDF use

# FOUNDATION RECOGNITION

The Rotary Foundation offers numerous opportunities for individuals who support our grants and programs to receive recognition and appreciation.

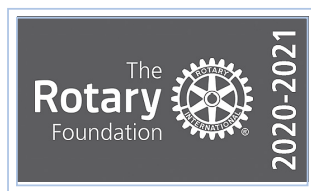
On [My Rotary](#), you can view your Donor History Report, which includes your personal contribution history and recognition summary. You can also request this report by emailing [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

## INDIVIDUAL RECOGNITION

Rotary leaders can use My Rotary or Rotary Club Central to view individual and club-level giving to identify recognition progress.

### Rotary Foundation Sustaining Member

A Rotary Foundation Sustaining Member personally contributes \$100 or more each Rotary year to the Annual Fund. These contributions count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition banners. Use the [Rotary Foundation Sustaining Member stickers](#) to recognize these donors in your club.



Use the Club Foundation Banner Report to see your club's Rotary Foundation Sustaining Members.

### Paul Harris Fellow

Paul Harris Fellow recognition is given to anyone who contributes (or in whose name is contributed, using Foundation recognition points) a gift of \$1,000 or more cumulatively to the Annual Fund, the PolioPlus Fund, or an approved global grant. Recognition consists of a certificate and pin. Use the Club Recognition Summary to see your club's Paul Harris Fellows.



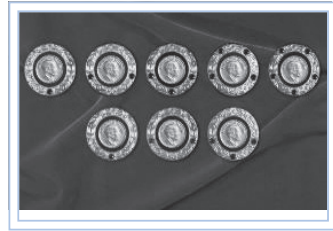
## Certificate of Appreciation

Certificate of Appreciation recognition is given to honor a business or organization. Since Paul Harris Fellow recognition is only for individuals, a donor may use their Foundation recognition points to award a business or organization a certificate of appreciation.



## Multiple Paul Harris Fellow

Multiple Paul Harris Fellow recognition is given at subsequent \$1,000 levels. Recognition consists of a pin set with additional stones corresponding to the recipient's recognition amount.



Level	Range*	Pin
+1	\$2,000 to \$2,999	one sapphire
+2	\$3,000 to \$3,999	two sapphires
+3	\$4,000 to \$4,999	three sapphires
+4	\$5,000 to \$5,999	four sapphires
+5	\$6,000 to \$6,999	five sapphires
+6	\$7,000 to \$7,999	one ruby
+7	\$8,000 to \$8,999	two rubies
+8	\$9,000 to \$9,999	three rubies

\*Range can consist of a combination of cash contributions and Foundation recognition points received.

## Paul Harris Society

The Paul Harris Society recognizes individuals who notify us of their intention to contribute \$1,000 or more each Rotary year to the Annual Fund, the PolioPlus Fund, or an approved global grant. Recognition consists of a chevron-style pin and certificate provided by your district Paul Harris Society coordinator.



Paul Harris Society members are listed in the Paul Harris Society Report.

## Major Donor

The Rotary Foundation recognizes individuals or couples whose combined giving has reached \$10,000, regardless of the gift designation. This recognition level can be achieved only through personal contributions and not through recognition points. Major Donors may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level. Major Donors are listed in the Major Donor, Arch Klumph Society, and Bequest Society Report.



Level	Range
1	\$10,000 to \$24,999
2	\$25,000 to \$49,999
3	\$50,000 to \$99,999
4	\$100,000 to \$249,999

## Arch Klumph Society

Donors who contribute \$250,000 or more become members of the Arch Klumph Society. Portraits, biographies, and, in some cases, video clips are housed in the digital Arch Klumph Gallery on the 17th floor of Rotary International World Headquarters; another digital gallery travels to Rotary events around the world. Members also receive lapel pins and pendants, signed certificates, and invitations to the society's exclusive events, held worldwide. Special induction ceremonies are offered to members.



Arch Klumph Society members are listed in the Major Donor, Arch Klumph Society, and Bequest Society Report.

Trustees Circle – \$250,000 to \$499,999

Chair's Circle – \$500,000 to \$999,999

Foundation Circle – \$1 million to \$2,499,999

Platinum Trustees Circle – \$2.5 million to \$4,999,999

Platinum Chair's Circle – \$5 million to \$9,999,999

Platinum Foundation Circle – \$10 million and above

## Benefactor

A Benefactor is an individual who notifies The Rotary Foundation of a commitment for future gifts to the Endowment of \$1,000 or more included in their estate plans or who makes an outright gift of \$1,000 or more to the Endowment. Benefactors receive a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin. They are listed in the Benefactor Report and identified in the Club Recognition Summary.



## Bequest Society

Individuals or couples who notify The Rotary Foundation of their commitment to include future gifts to the Foundation of \$10,000 or more in their estate plans are invited to join the Bequest Society. Each level of giving includes the benefits of the preceding levels:

- \$10,000 A Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000 A Rotary's Promise crystal and a named endowed fund
- \$50,000 Separate named endowed funds
- \$100,000 A customized Rotary's Promise crystal
- \$250,000 Posthumous induction into the Arch Klumph Society
- \$500,000 Special seating and registration benefits at the Rotary International Convention



## Legacy Society

Individuals or couples who substantiate future gifts to the Endowment of \$1 million or more are invited to join the Legacy Society. These donors are listed in Rotary's annual report and are invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special tokens of appreciation and all the benefits provided to Bequest Society members.

## CLUB RECOGNITION

The Rotary Foundation offers clubs several opportunities to earn recognition for their support of its grants and programs.

The Club Foundation Banner Report displays a club's progress in the current Rotary year toward becoming a 100% Foundation Giving Club and a 100% Every Rotarian, Every Year Club, and toward qualifying for Top Three Per Capita in Annual Fund Giving banner recognition.

As of 2015-16, new club members (those who joined or transferred from another club during the current Rotary year) are not included in participation requirements for club banners (except for the 100% Paul Harris Fellow Club banner). However, new members' contributions will be used for per capita calculations.

Banner recipients listed in the Club Foundation Banner Report (available to club and district Foundation leaders on My Rotary or Rotary Club Central) may fluctuate throughout the Rotary year due to changes in membership and additional or redistributed contributions. Leaders can use the report to determine whether your club will qualify for the annual recognition banners listed below. Final banner certification is processed by The Rotary Foundation following the close of the Rotary year on 30 June. Club banners earned for the previous year are shipped to the current district governor in October or November. Request the District Foundation Banner Report at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

### 100% Foundation Giving Club

This banner is awarded to clubs that achieve an average of \$100 in per capita giving and 100% participation, with every dues-paying member contributing at least \$25 to any or all of the following during the Rotary year: Annual Fund, PolioPlus Fund, approved global grants, or Endowment Fund.



### 100% Paul Harris Fellow Club

For a club to be eligible, every dues-paying member must be a Paul Harris Fellow at the time the district governor requests banner recognition. This recognition is a one-time-only award, but the intent is that the club will maintain its membership at the 100% Paul Harris Fellow level.





To obtain this recognition:

1. A club representative contacts the district governor after determining that all current dues-paying club members are Paul Harris Fellows.
2. The district governor confirms that all members are Paul Harris Fellows by using the Club Recognition Summary, and then notifies The Rotary Foundation by email at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

The top of the Club Recognition Summary indicates whether the club received the 100% Paul Harris Fellow Club banner, along with the date this was achieved.

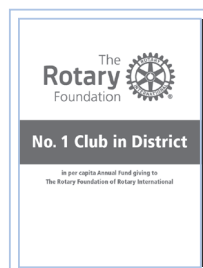
### 100% Every Rotarian, Every Year Club

Rotary clubs must achieve a minimum Annual Fund contribution of \$100 per capita during the Rotary year, and every dues-paying member must personally contribute at least \$25 to the Annual Fund during the year.



### 100% Rotary's Promise Club

Rotary clubs with 100% of members supporting the Endowment are eligible to request a Rotary's Promise Club electronic certificate. Commitments for future gifts to The Rotary Foundation of \$1,000 or more included in an estate plan, or outright gifts of \$1,000 or more to the Endowment, qualify as support.



### Top Three Per Capita in Annual Fund Giving

Banners are given to the three clubs in each district that give the most per capita to the Annual Fund. To be eligible, clubs must achieve a minimum of \$50 in per capita annual giving.

### 100% Paul Harris Society Club

This recognition is awarded to clubs in which every dues-paying member has contributed a minimum of \$1,000 to the Annual Fund, the PolioPlus Fund, or an approved global grant during the Rotary year.



## **End Polio Now: Countdown to History Campaign Certificate of Appreciation**

This certificate is awarded to clubs that annually contribute \$1,500 or more to Rotary's PolioPlus Fund.

## **Rotaract Giving Certificate**

This certificate is awarded to Rotaract clubs that have at least five members who contribute a total of at least \$50 during the Rotary year. The donors must be registered as members of the Rotaract club. Their gifts can be to any fund and in any amounts totaling \$50.

## **FOUNDATION RECOGNITION POINTS**

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, the PolioPlus Fund, or an approved global grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Contributions to the Endowment are not eligible.

Donors can extend Foundation recognition points to other individuals to help them become, or to name them as, a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor uses the points or until the donor's death, at which time they expire (unless the donor is a Major Donor, in which case their points may be used by their surviving spouse or partner).

Note: Foundation recognition points do not count toward Paul Harris Society and Major Donor recognition.

### **Transfer rules**

A minimum of 100 Foundation recognition points must be transferred at a time, and an authorizing signature is required when you complete the [Paul Harris Fellow Recognition Transfer Request Form](#).

Note: Foundation recognition points may not be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow to receive recognition points.

## FOUNDATION RECOGNITION RESOURCES

- [Every Rotarian, Every Year brochure](#): Information about the Annual Fund and SHARE
- [Rotary Foundation Sustaining Member stickers](#): Badge stickers to celebrate Rotary members who have contributed \$100 or more to the Annual Fund; available for order by club or district officers
- [Paul Harris Society brochure](#): Information about Paul Harris Society recognition
- [Rotary Giving Works brochure](#): Information about major gifts
- [Your Rotary Legacy commitment notification card](#): Information about the Endowment, legacy recognition, and naming opportunities; includes a response card that is required for recognition
- [Arch Klumph Society brochure](#): Information about the Arch Klumph Society
- [Understanding Foundation Recognition Points](#): Fact sheet that answers common questions about the points system
- Useful recognition reports on Rotary.org and Rotary Club Central:
  - Major Donor, Arch Klumph Society, and Bequest Society Report
  - Paul Harris Fellow and Benefactor Report
  - Club Foundation Banner Report
  - District Foundation Banner Report

# GENERAL RESOURCES

## MY ROTARY

The member website, known as [My Rotary](#), includes everything you need to conduct your Rotary business. Familiar tools and applications are now found under Club & District Administration. Sign in so you can:

- Monitor club membership initiatives, service activities, and Foundation giving goals through Rotary Club Central
- Donate to The Rotary Foundation
- Learn more about Rotary Foundation activities
- Apply for grants in the Grant Center
- View your Donor History Report, which includes your contribution history and recognition summary
- Share your project impact and inspire others on Rotary Showcase

## Reports

Rotary leaders can access the following reports through My Rotary, Rotary Club Central, or Rotary's Support Center.

Please note that Foundation giving reports should be used for authorized Rotary purposes only. By using these reports, you agree to abide by Rotary's [Data Use Policy](#), which prioritizes protecting individual privacy and personal information. Leaders who have access to reports are strongly encouraged to read the policy and to take the [Protecting Personal Data](#) course in the Learning Center.

## Giving reports

The following reports are available to Rotary leaders.

Report	Content	Type
Donor History Report	Provides a comprehensive breakdown of your transactions (contributions, Foundation recognition point transfers, commitments, and recognition); use to reconcile your contributions/recognition issues	Individual
Club Foundation Banner Report	Provides eligibility dates achieved for EREY and Rotary Foundation giving banners for the current Rotary year	Club, district
Club Fundraising Analysis	Five-year dashboard of Annual Fund goals, giving, and recognition totals. Use it to set goals.	Club, district
Club Recognition Summary	Provides members' Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct participation, Benefactors, last contribution date, and designation; indicates 100% Paul Harris Fellow Club achievement and date, along with the clubs' all-time Foundation giving; use to identify noncontributing clubs	Club, district
Monthly Contribution Report	Provides contribution information by club for PolioPlus and other funds (Annual Fund, global grants, Endowment)	Club, district
PolioPlus Report	Provides contribution information by club and by fund	Club, district
SHARE Contribution Detail Report	See each club's Annual Fund-SHARE contributions, which determine the amount of the district's DDF for a given Rotary year	Club, district
District Foundation Banner Report	Shows progress toward club banner recognition (Top Three Per Capita in Annual Giving, 100% Foundation Giving, 100% EREY Club) for a Rotary year; lists the percentage of participation by club for Foundation Giving and EREY recognition	District
Paul Harris Society Report	Provides Paul Harris Society membership and a four-year history of eligibility; includes tab with donor contact information	Club, district

Report	Content	Type
District Fundraising Profile	Provides a five-year dashboard for district giving to The Rotary Foundation; lists cumulative number of Paul Harris Society members and those eligible, Major Donors, major gifts, Benefactors, and Bequest Society members; lists number of Foundation recognition points and total endowed funds and their market value	District
Major Donor and Bequest Society Report	Lists Bequest Society and Legacy Society members and Major Donors and their recognition dates; includes mailing addresses	Club, district
Paul Harris Fellow and Benefactor Report	Provides lists of Benefactors, Paul Harris Fellows, multiple Paul Harris Fellows, and Certificate of Appreciation recipients; includes recognition dates and mailing address information	Club, district
Program Participants and Alumni by District	Provides a list of current and past program participants associated with a particular district	District
Available DDF by District Report	Shows all DDF activity (transfers, grant funding, returned funds, pending allocations) and the estimated available balance as of the previous business day	District
Endowed Fund Update	Shows available DDF from Endowment Fund-SHARE spendable earnings	District

## Grants reports

The following reports are available to all Rotary members.

Report	Content
Grant Detail Report	Comprehensive details about one grant
Grant Location Report	All approved global grants taking place in a selected country
Grant Participation Report	Club, district, and zone participation in global grants and district grants

Report	Content
Grant Productivity Report	Global grants and district grants in all statuses for a selected club, district, or zone
Grants by Sponsor Report	Grants by a specified club or district and their current status (closed and canceled grants are not included)

## WHERE TO DIRECT QUESTIONS

Call +1-866-976-8279 or email [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org) to check on contributions and recognition points, find information about grants, and ask questions.

Non-English-speakers should contact their local Rotary International office.

## DISTRICT AND ZONE RESOURCES

District Rotary Foundation chairs (DRFCs) promote Foundation activities and fundraising in their district, serve as the primary contact for district grants, and provide support to club Foundation committees. DRFCs review and authorize all global grant applications sponsored by their district and member clubs. DRFCs also assist the district governor with authorizing the use of District Designated Funds, nominating qualified recipients for district Rotary Foundation awards, and obtaining input from Rotarians before establishing district Foundation goals.

Regional Rotary Foundation coordinators (RRFCs) promote Foundation activities and fundraising in their zone or area. RRFCs train their zone team of assistant regional Rotary Foundation coordinators and district leaders in setting and achieving fundraising and program goals.

Endowment/major gifts advisers work closely with regional and district leaders to develop personalized plans for identifying and cultivating potential donors, and soliciting major gifts. They also help facilitate events that engage current Foundation supporters and develop prospective donors.

A list of current RRFCs and endowment/major gifts advisers is available at [Rotary.org](http://Rotary.org).

## CONTRIBUTIONS BY MAIL

### **Brazil**

Rotary International Office  
Condominio Comercial Casa das  
Caldeiras  
Av. Francisco Matarazzo, 1752,  
conj. 1421  
Água Branca  
São Paulo, SP  
05001-200 Brazil

### **Canada**

The Rotary Foundation (Canada)  
c/o 911600  
P.O. Box 4090 STN A  
Toronto, ON M5W 0E9  
Canada

### **Europe and Africa**

Rotary International Office  
Witikonstrasse 15  
CH-8032 Zurich  
Switzerland

### **Germany**

Rotary Deutschland  
Gemeindienst e. V.  
Kreuzstrafie 34  
40210 Dusseldorf  
Germany

### **Great Britain and Ireland**

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

### **Japan**

Rotary International Office  
Mita Kokusai Building 24F  
Mita 1 Chome 4-28, Minato-ku  
Tokyo 108-0073  
Japan

### **Korea**

Rotary International Office  
Rm. 705, 70, Gukjegeumyung-ro  
Yeongdeungpo-gu  
Seoul 07333  
Korea

### **South Asia**

Rotary International Office  
Pullman/Novotel Commercial  
Tower  
First Floor, Asset No. 2,  
Hospitality District  
Aerocity (Near IGI Airport)  
New Delhi 110037  
India

### **South Pacific and Philippines**

Rotary International Office  
Level 2  
60 Phillip Street  
Parramatta, NSW 2150  
Australia

### **United States**

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







One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
Rotary.org

219-EN-(1220)