

HOW CAN I FULFILL MY INTENT TO GIVE \$1,000?

The path to fulfilling your Paul Harris Society giving intentions each year is up to you. You can donate \$1,000 at one time or in several smaller amounts that reach that total. One easy way is to donate automatically through the Rotary Direct recurring giving program. For example:

- \$85 monthly
- \$250 quarterly
- \$1,000 annually

Enroll in recurring giving at rotary.org/donate.

HOW WILL MY MEMBERSHIP BE RECOGNIZED?

Rotary districts are encouraged to recognize members of the society by presenting them a certificate and a Paul Harris Society chevron lapel pin at a district or club event, or at another special occasion. Because the society is a district-led program, leaders celebrate their local Paul Harris Society members differently around the world.

Show your commitment to making the world a better place by wearing your recognition pin.



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
[Rotary.org](https://rotary.org)

099-EN—(520)

PAUL HARRIS SOCIETY



The
Rotary
Foundation



TAKE ACTION:
rotary.org/donate

WHAT IS THE PAUL HARRIS SOCIETY?

The Paul Harris Society recognizes donors from around the world who notify The Rotary Foundation of their intention to **contribute \$1,000 or more every year** to the Annual Fund, PolioPlus Fund, or approved global grants.

HOW CAN I JOIN THE PAUL HARRIS SOCIETY?

Notify The Rotary Foundation of your intent to contribute \$1,000 or more every year by doing any of the following:

- Completing the form on the Paul Harris Society's webpage at rotary.org/paulharrissociety (look for the JOIN button to open the form)
- Emailing the Rotary Support Center at rotarysupportcenter@rotary.org or calling 1-866-9ROTARY (1-866-976-8279); for security reasons, please do not email your completed form
- Contacting the Rotary International office that serves your area
- Mailing the attached Paul Harris Society form to The Rotary Foundation or faxing it to the Rotary Support Center at +1-847-328-4101



WHO ARE PAUL HARRIS SOCIETY MEMBERS?

Globally, more than 20,000 people are members of the society, which was established in 2013. These dedicated donors share a desire to give substantially and empower Rotary clubs to change lives in their community and around the world.

“I joined the Paul Harris Society because I believe in The Rotary Foundation. I know that by combining our giving with so many others’ we can truly make an impact and do good in the world.”

— John Salyers, past governor of District 6740

☐ **Yes! I would like to become a member of the Paul Harris Society. As a member, I intend to contribute \$1,000 or more every year.**

Name _____

If you are a Rotarian:

Rotary Membership ID _____

Rotary Club of _____

Club Number _____

Billing Address _____

City _____ State/Province _____

Postal Code _____ Country _____

Phone _____ Email _____

☐ U.S. check, payable to “The Rotary Foundation,” enclosed.

☐ Canadian cheque, payable to “The Rotary Foundation (Canada),” enclosed.

☐ Please contact me about creating a legacy with Rotary.

☐ I wish to contribute today. ☐ I will make my contribution at a later date.

Note: Fulfillment of your Paul Harris Society Membership will be based on cumulative gifts received between 1 July and 30 June each Rotary year, when financially able.

PHS 099

Gift designation (choose one)

☐ Annual Fund ☐ PolioPlus Fund ☐ Other: _____

Gift amount (USD)

☐ \$85 ☐ \$250 ☐ \$1,000 ☐ Other: \$ _____

Make this a recurring contribution with Rotary Direct

☐ Monthly ☐ Quarterly ☐ Annually _____ (Please specify month)

Card Number _____

Expiration Date _____

CVN _____

M M Y Y

Signature _____

Contributions are tax deductible where allowed by law. **Contributions from the U.S. or Canada can be mailed to:**

The Rotary Foundation

14280 Collections Center Drive

Chicago, IL 60693 USA

The Rotary Foundation (Canada)

c/o 911600

PO Box 4090 STN A

Toronto, ON M5W 0E9 Canada

For donors outside of the U.S. or Canada, please mail to the international office that serves your area. Contributions may also be made at rotary.org/donate or by calling 1-866-9ROTARY (1-866-976-8279).



THE ROTARY FOUNDATION
**REFERENCE
GUIDE**

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995. The public sector has become a major employer in the UK, and its growth has been a major factor in the overall growth of the economy.

The public sector has also become a major provider of social services, and its growth has been a major factor in the overall growth of the economy. The public sector has become a major provider of social services, and its growth has been a major factor in the overall growth of the economy.

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All figures are in U.S. dollars.

THE ROTARY FOUNDATION

The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating 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.

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 15 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
- **Become a Peacebuilder District:** How districts can support peace fellowships

For more information and resources, visit rotary.org/peace-fellowships.

PROGRAMS OF SCALE

Rotary's Programs of Scale grants build on the scope, impact, and sustainability of successful Rotary service projects in our areas of focus that can support larger and longer-term undertakings. They empower Rotary members to work with experienced partners to implement large-scale, high-impact projects that benefit a large number of people in need across a significant geographic area.

The Rotary Foundation awards one \$2 million Programs of Scale grant each year to a program sponsored by a Rotary club or district that is working in strong collaboration with partners. Each grant helps a program scale up, or expand, over three to five years to create lasting change.

The competitive application process requires first a program overview in the form of a concept note and, later, a detailed program design in the form of a proposal. For the concept note, applicants should be prepared to submit a program overview that is based on evidence and was planned in consultation with key stakeholders. This increases the chances of successful implementation and sustainability. For the proposal stage, a monitoring, evaluation, and learning plan should also be fully integrated into the program to measure for impact.

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 10) 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 an 80% 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
- Environment

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.

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.

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 or email 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:

- 47.5% is credited to the World Fund.
- 47.5% is credited to the District Designated Fund.
- 5% is credited to operating expenses.

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, 47.5% of the contributions received during 2021-22 are available for spending in 2024-25.

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. 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 29 for your regional office mailing address.

Information concerning gifts of stocks, bonds, and mutual funds is available at 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.

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.
- 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. 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.

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. 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

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
- **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.

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.

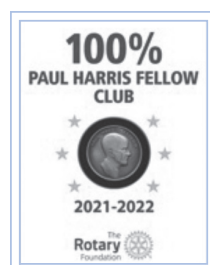
100% Foundation Giving Club

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.

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

Report	Content	Type
Paul Harris Society Report	Provides Paul Harris Society membership and a four-year history of eligibility; includes tab with donor contact information	Club, district
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

Report	Content
Grant Participation Report	Club, district, and zone participation in global grants and district grants
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 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.

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.
Kreuzstrasse 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
P.O. Box 6985
Norwest, NSW 2153
Australia

United States

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

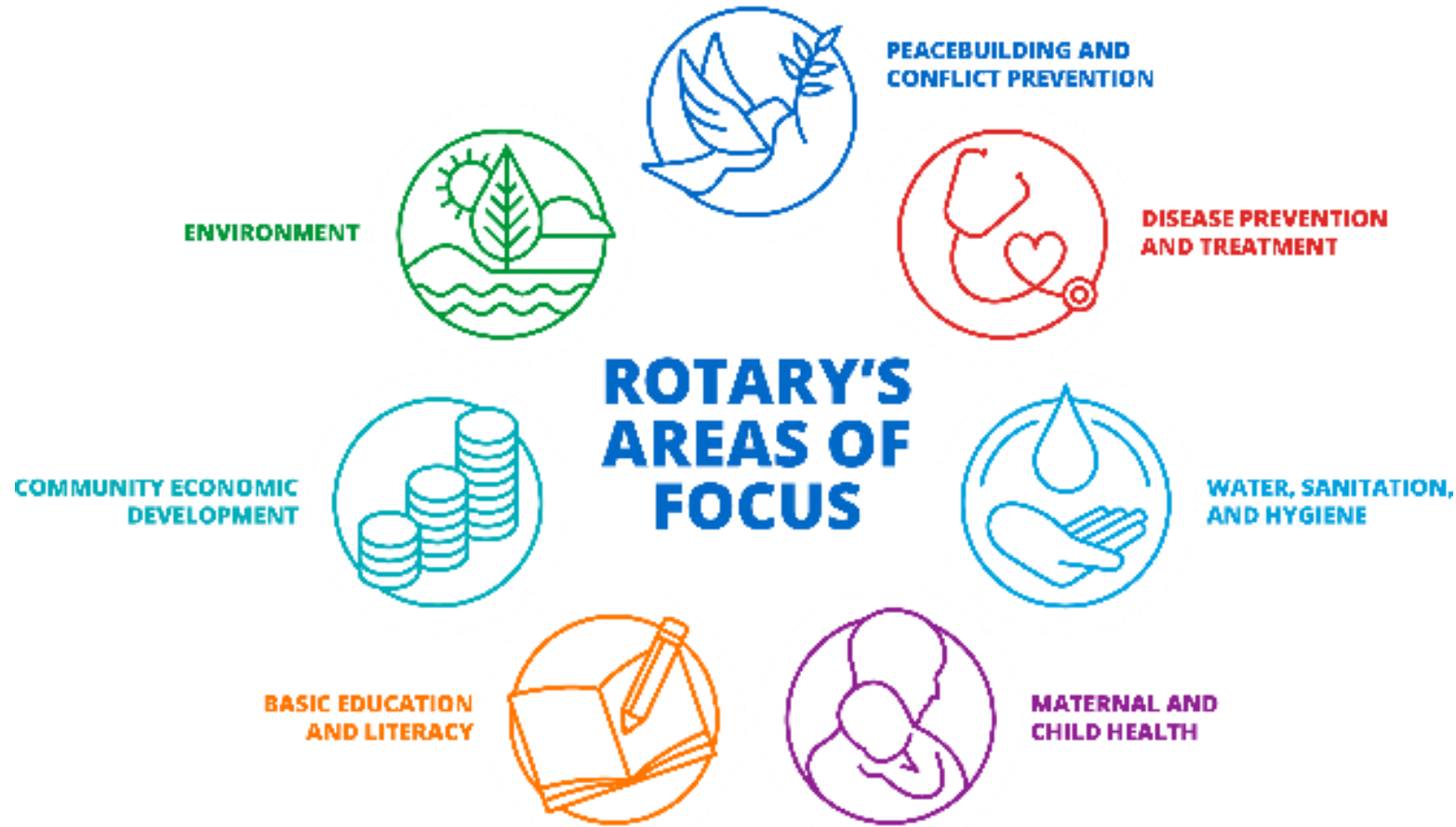


One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Rotary.org

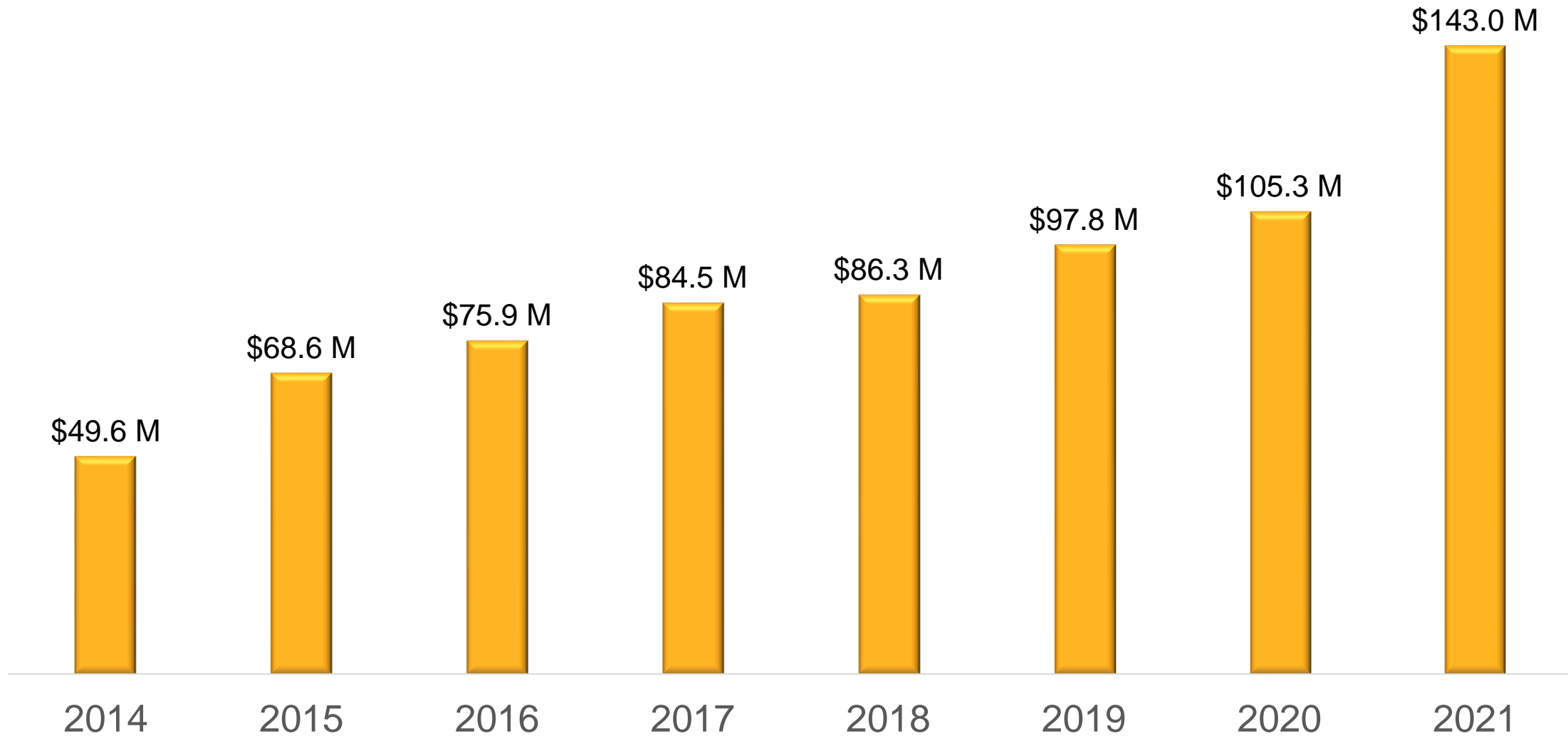
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GLOBAL GRANT FUNDING IN THE AREAS OF FOCUS
RY2014-21



Global Grant Funding in the AOFs RY2014-21



Global Grant Funding Per AOF RY2014-21



**DISEASE PREVENTION
AND TREATMENT**

\$299.9 M



**WATER, SANITATION,
AND HYGIENE**

\$154.4 M



**COMMUNITY ECONOMIC
DEVELOPMENT**

\$90.6 M



**BASIC EDUCATION
AND LITERACY**

\$79.9 M



**MATERNAL AND
CHILD HEALTH**

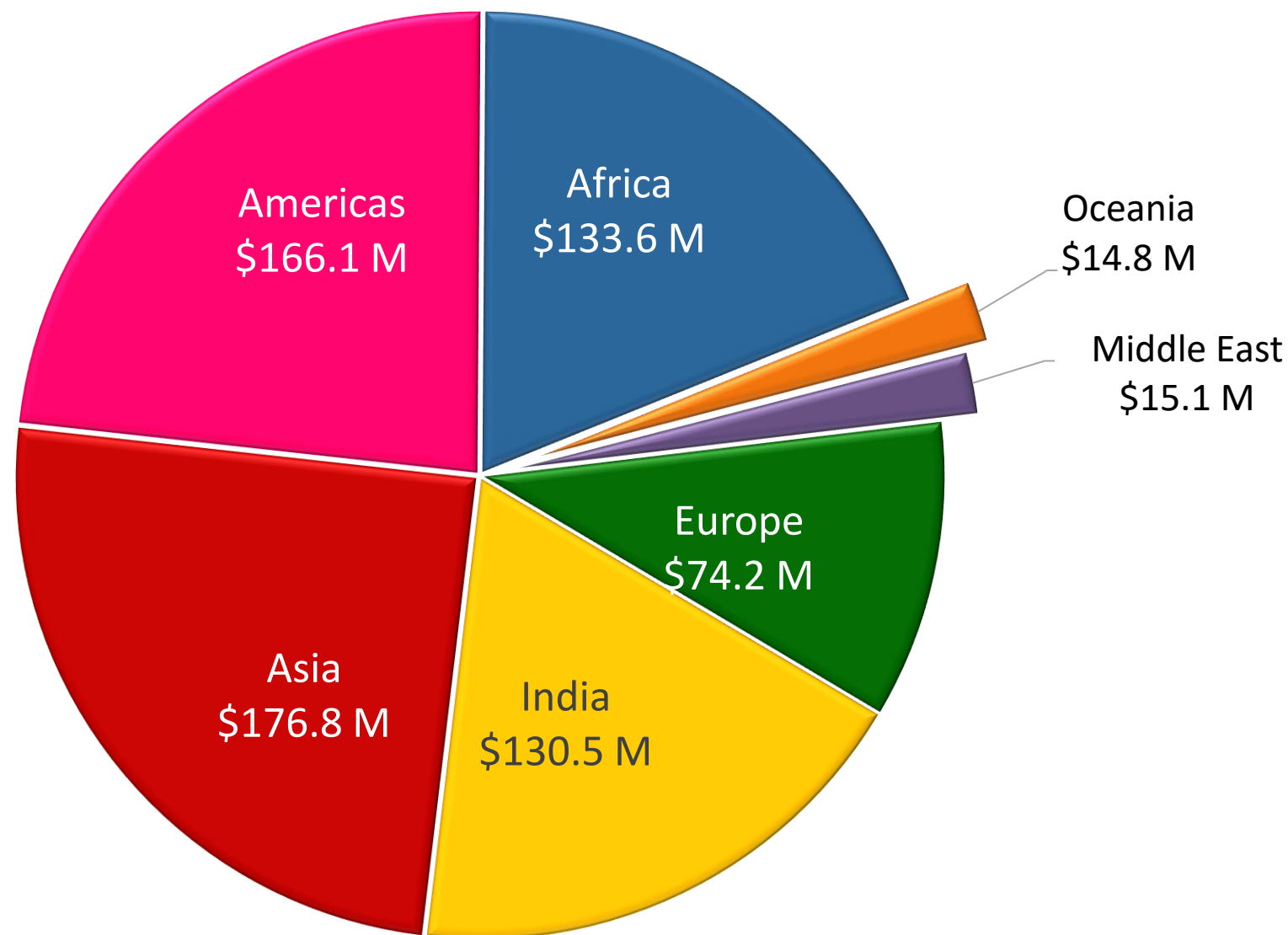
\$58.0 M



**PEACEBUILDING AND
CONFLICT PREVENTION**

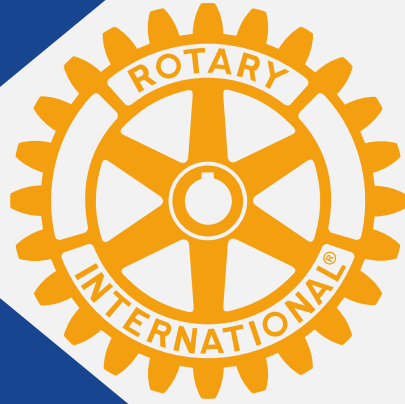
\$28.3 M

Global Grant Funding Per Region RY2014-21





BASIC EDUCATION & LITERACY



TRF Global Grants (2014-21)

\$79.9 Million

1,246 grants

4 QUALITY
EDUCATION



**BASIC EDUCATION
AND LITERACY**

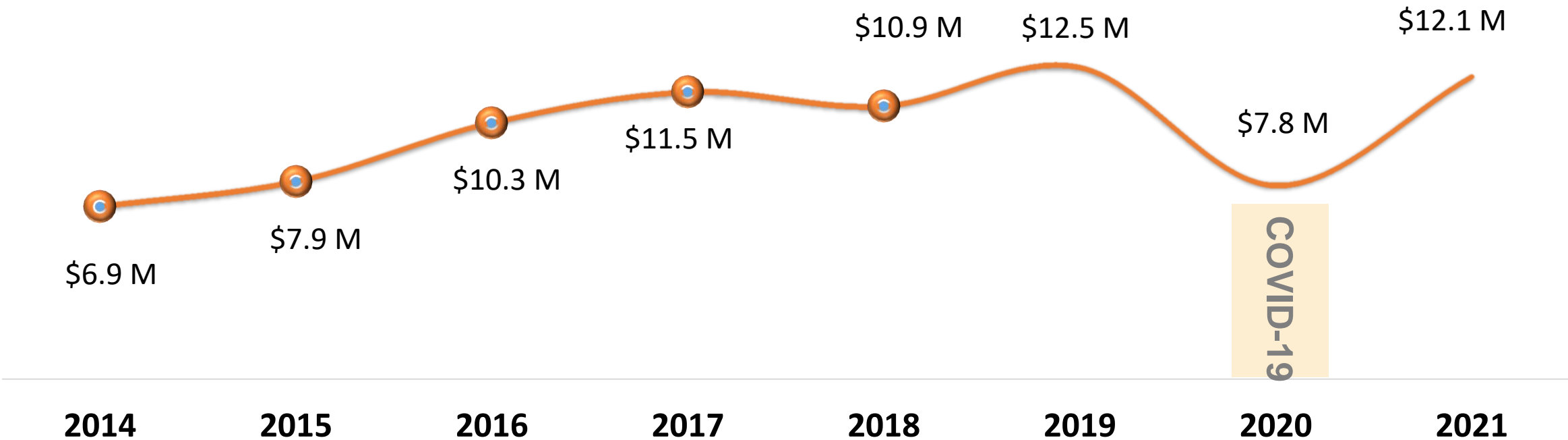
Rotary's Area of Focus

Improving sustainable access to basic education & literacy for all people

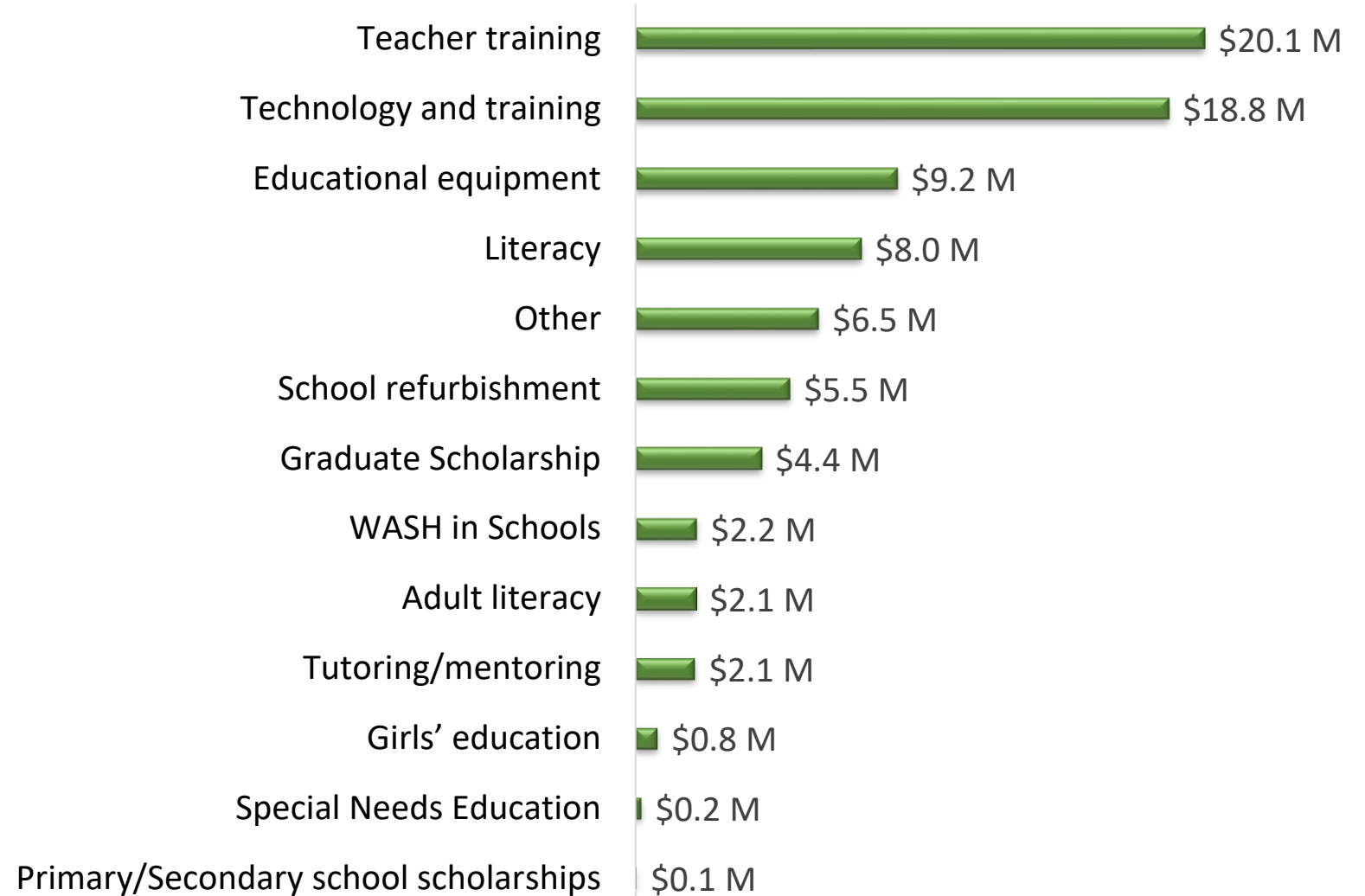
1. Strengthening the abilities of communities to provide basic education & literacy to all
2. Increasing adult literacy
3. Reducing gender disparity in education
4. Funding graduate scholarships for career-minded professionals related to basic education and literacy



BEL Global Grant Funding - Year to Year (RY2014-21)



Global Grant Funding by BEL Project Type RY2014-21





Project Highlight

Guatemala Literacy Project

The Guatemala Literacy Project (GLP) leverages the proven approaches and complementary strengths of the partnership established since 1997 between Rotary clubs and CoEd: the professional expertise, oversight, local relationships and funding of Rotary clubs and the technical expertise of CoEd. Since 2014, Rotarians and CoEd have developed literacy programs targeting the most illiterate parts of the country.

Outputs:

- Equipping 600+ teachers in 140 schools with intensive training and children's books
- Provision of high-quality textbooks to 4,600+ middle-school students
- Hands-on instruction in standard business software to 2000+ students over a 3-year period
- A youth development program.



COMMUNITY ECONOMIC DEVELOPMENT





1 NO POVERTY



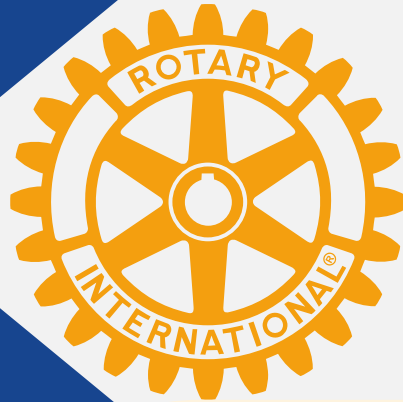
2 ZERO HUNGER



8 DECENT WORK AND ECONOMIC GROWTH



10 REDUCED INEQUALITIES



TRF Global Grants (2014-21)

\$90.6 Million

1,486 grants

Rotary's AOF

Alleviating poverty and creating measurable and enduring economic improvements in marginalized communities

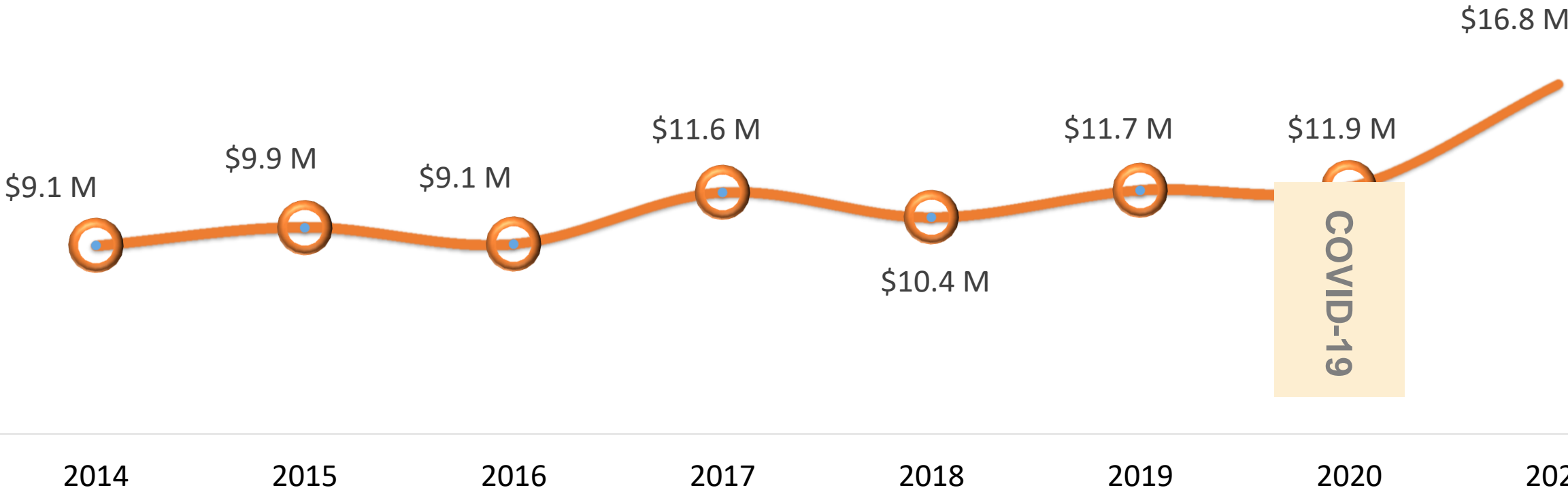


**COMMUNITY ECONOMIC
DEVELOPMENT**

- Building the capacity of local entrepreneurs, social businesses and organizations to support economic development in poor communities
- Improving marginalized communities' access to economic opportunities and services, strengthening their resilience to natural disasters
- Funding graduate scholarships for career-minded professionals related to community economic development

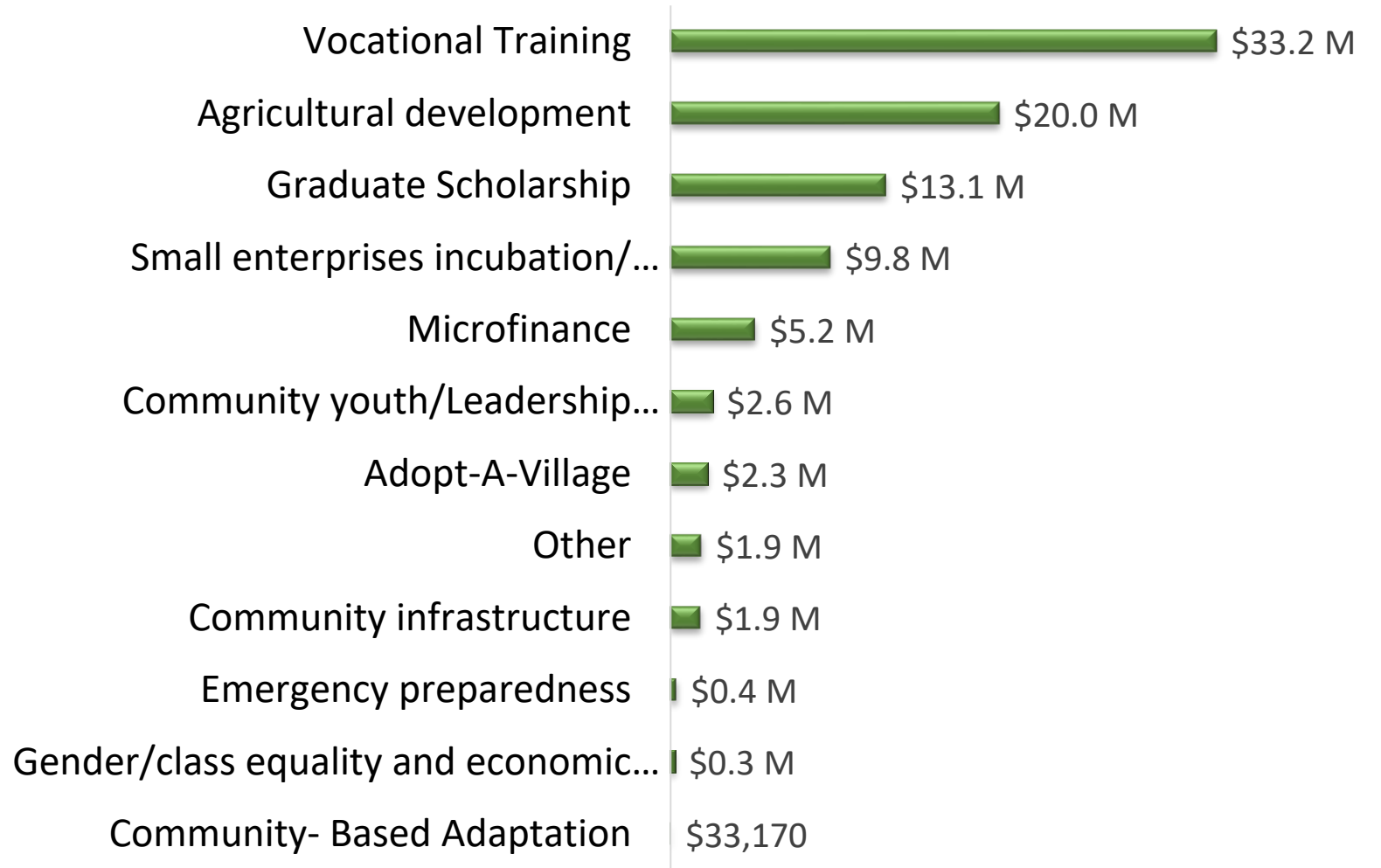


CED Global Grant Funding – Year to Year RY2014-21





Global Grant Funding by CED Project Type RY2014-21





CED PROJECT HIGHLIGHT

Vocational Training for 'Kamlari' girls in Nepal

The Rotary Club of Patan in collaboration with the Nepal Youth Foundation imparted vocational skills in tailoring, vegetable and pig farming, mobile repairing and house wiring to girls freed from indentured servitude in Western Nepal.

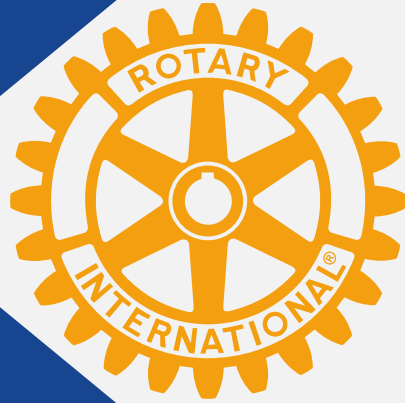
Output:

- 97% of the girls who completed the training found gainful employment immediately following the training.



DISEASE PREVENTION & TREATMENT





TRF Global Grants (2014-21)

\$299.9 Million

4,128 grants

**3 GOOD HEALTH
AND WELL-BEING**



Rotary's AOF

Reducing the causes and effects of disease and strengthen the health care system

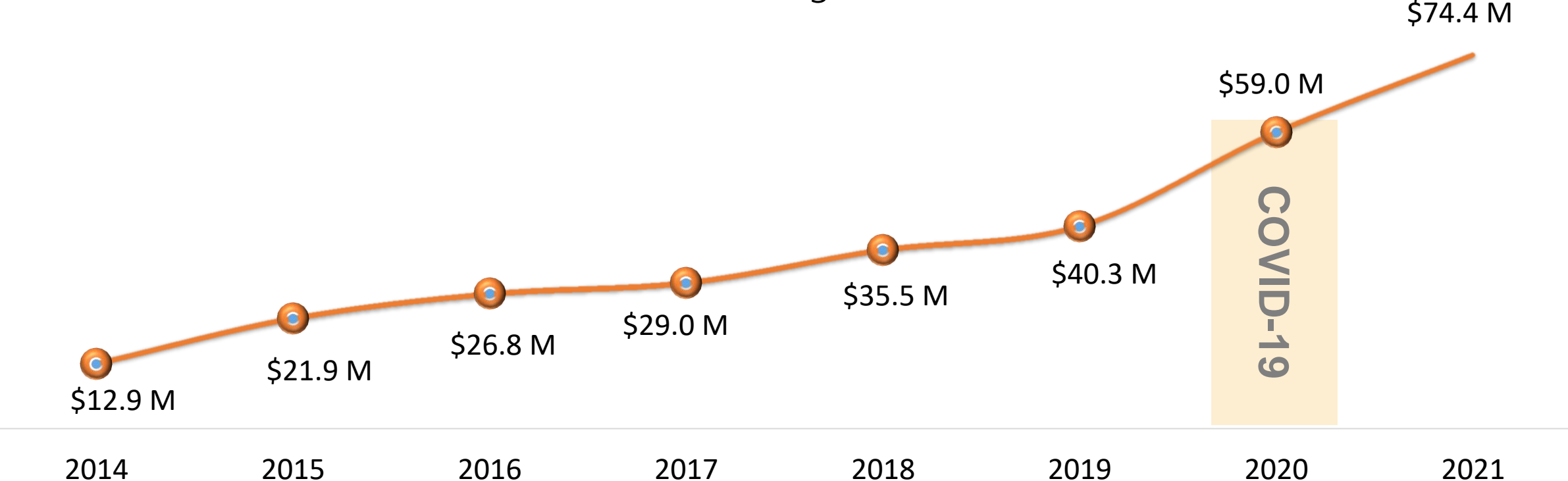


**DISEASE PREVENTION
AND TREATMENT**

- Improving the capacity of local health care professionals
- Promoting disease prevention and treatment programs that limit the spread of communicable diseases and reduce the incidence and effect of noncommunicable diseases
- Strengthening health care systems
- Providing clinical treatment and rehabilitation for physical disabilities
- Funding graduate scholarships for career-minded professionals related to disease prevention and treatment

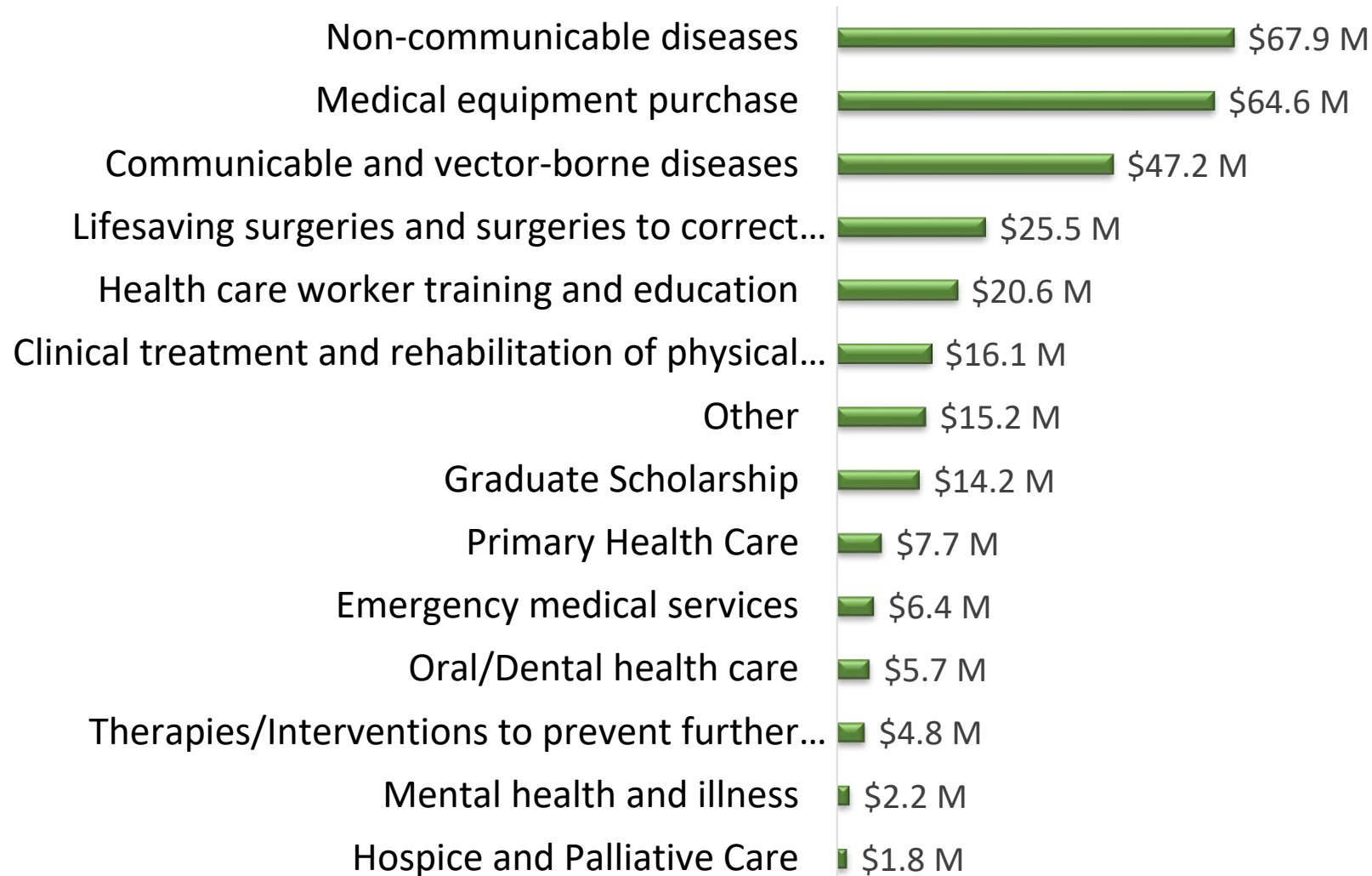


DPT Global Grant Funding – Year to Year RY2014-21





Global Grant Funding by DPT Project Type RY2014-21



Project Highlight

Fight Against Opioid Addiction - USA

With one American dying every 19 minutes from opioid or heroin overdose, the Rotary Committee to Fight Addiction identified a series of needs within District 7170 communities and invested in four interventions:

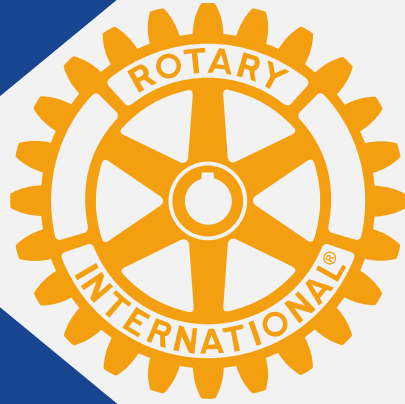
- Support of The Teen Institute, which empowers teens with the knowledge, skills and confidence to lead an alcohol, tobacco and other drug-free life
- Purchase of equipment for the diagnostic unit of the Addiction Center of Broome County, and expansion of its outpatient ancillary withdrawal management programs
- Purchasing and installation of drug drop box kiosks to ease access for the disposal of drugs.
- A media campaign targeting key demographics throughout the district with information on prevention, detection, and sources of assistance, treatment and recovery





MATERNAL & CHILD HEALTH





TRF Global Grants (2014-21)

\$58.0 Million

690 grants

3 GOOD HEALTH
AND WELL-BEING



**MATERNAL AND
CHILD HEALTH**

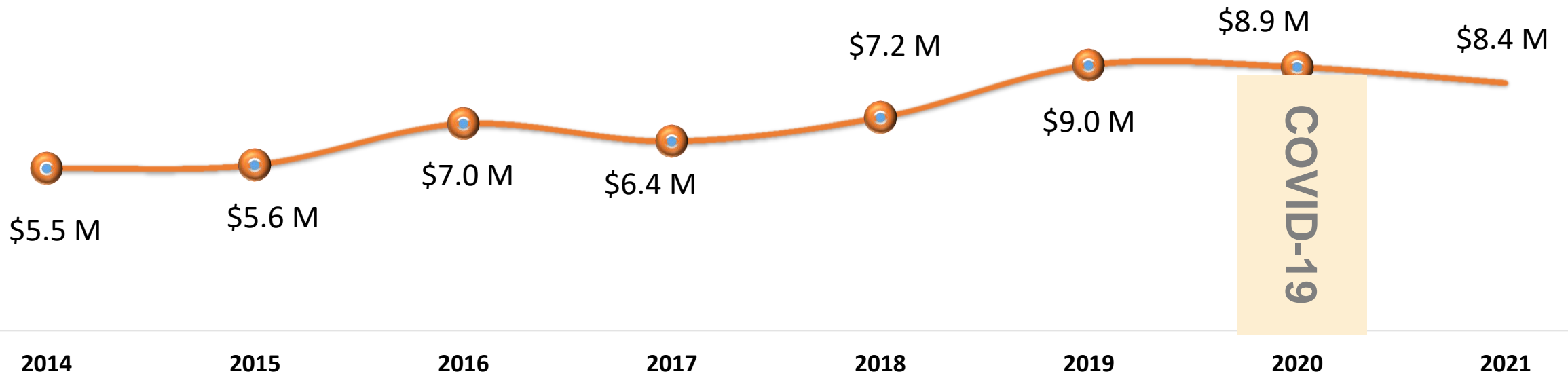
Rotary's AOF

Improving maternal health and reducing mortality for children under five.

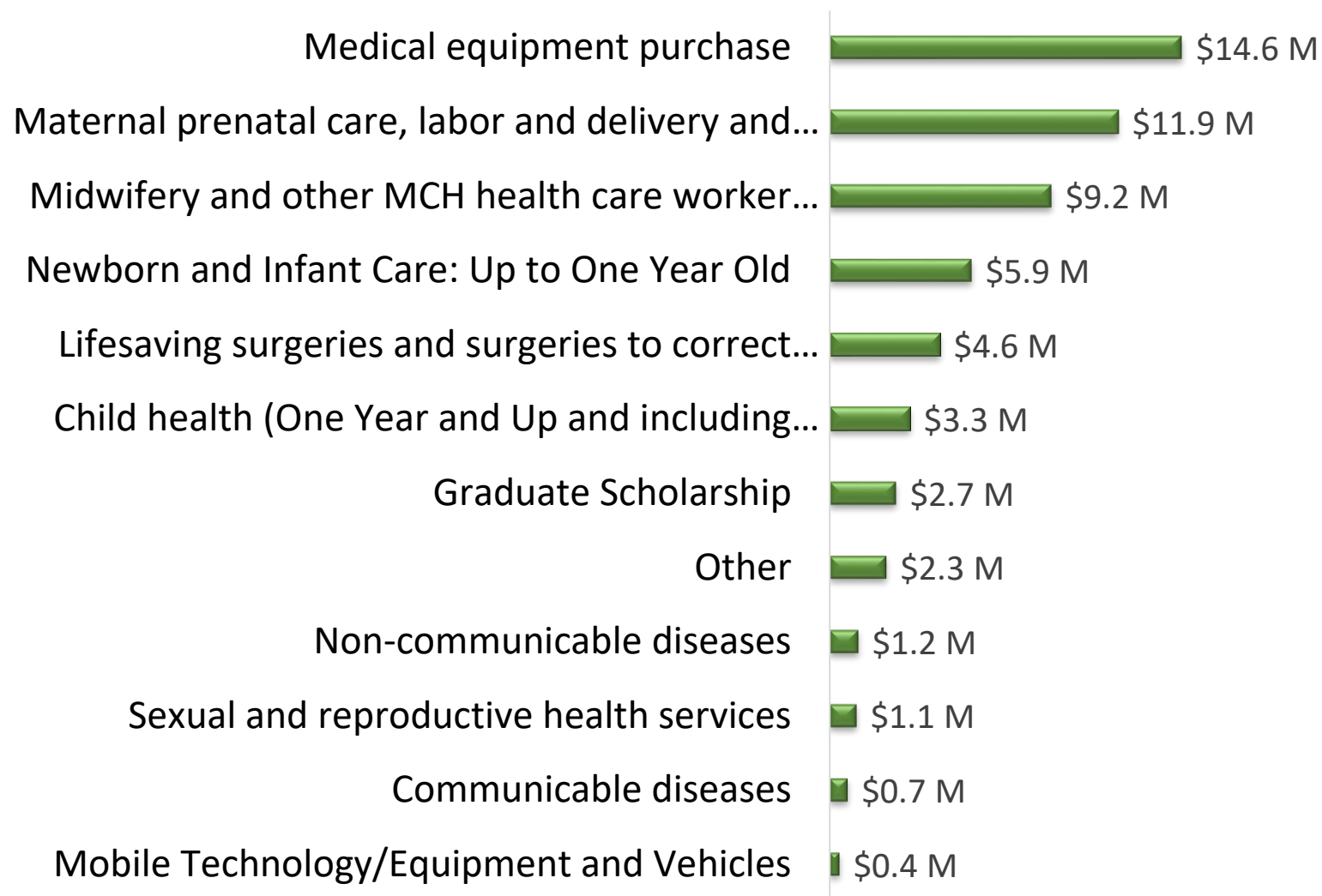
- Reducing the neonatal and newborn mortality rate
- Reducing the mortality and morbidity rate of children under five
- Reducing the maternal mortality and morbidity rate
- Improving access to essential medical services, trained community health workers, and health care providers
- Funding graduate scholarships for career-minded professionals related to maternal and child health



MCH Global Grant Funding - Year to Year RY2014-21



Global Grant Funding by MCH Project Type RY2014-21



QUEMADURAS
INFANTILES





Project Highlight

Give Every Child a Future - South Pacific

Despite improvements in immunizations in the Pacific, the poorest and hardest to reach children are being left behind with pneumonia and diarrhea as the leading killers of children.

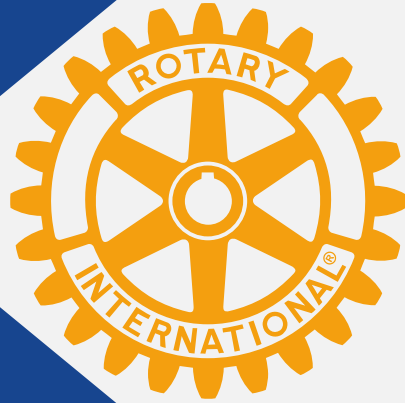
Rotarians from Australia and New Zealand partnered with UNICEF and ministries of health in 9 Pacific island countries to introduce 3 new childhood and adolescent vaccinations and strengthen the health care infrastructure of all nice countries.

The five-year, multimillion dollar project, kicked off on the occasion of the Centenary of Rotaria in Australasia in 2021 targets 100,000 children and adolescent girls with three life-saving vaccines: Rotavirus vaccine to prevent a severe form of diarrhea, Pneumococcal vaccine to prevent pneumonia, blood infections (such as sepsis) and meningitis, and Human Papillomavirus vaccine against some kinds of cervical cancer.



PEACEBUILDING & CONFLICT PREVENTION





TRF Global Grants (2014-21)

\$28.3 Million

636 grants

16 PEACE, JUSTICE
AND STRONG
INSTITUTIONS



**PEACEBUILDING AND
CONFLICT PREVENTION**

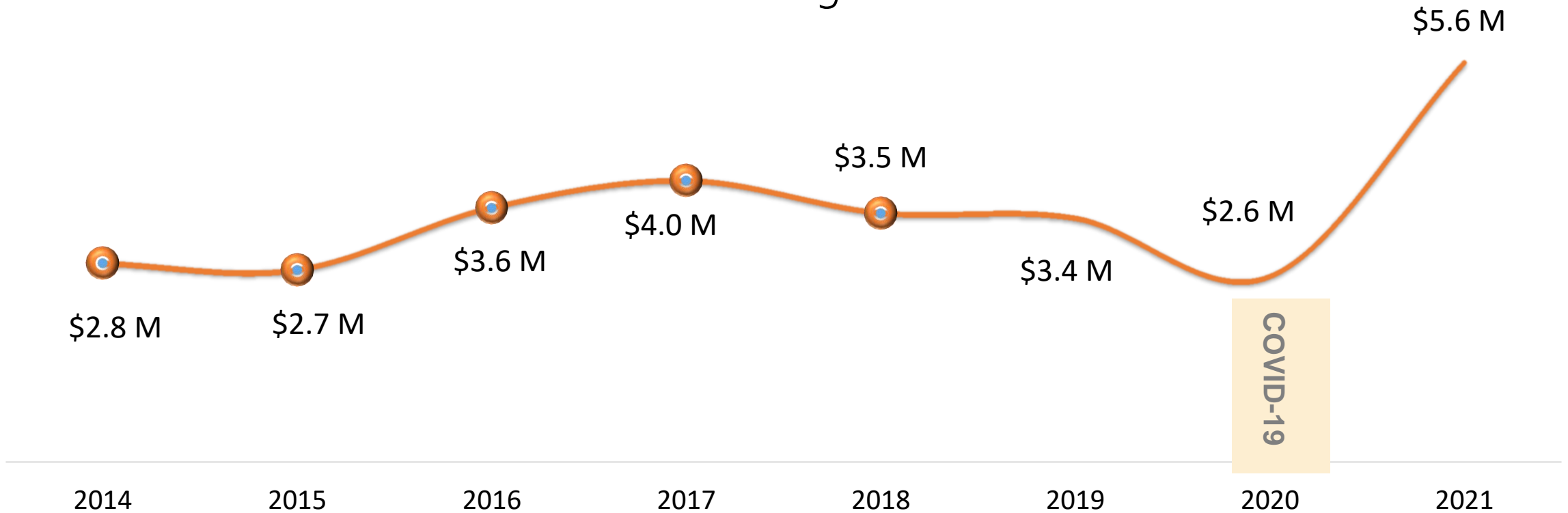
Rotary's AOF

Advancing peacebuilding and preventing conflict

- Enhancing the capacity of individuals and communities to transform conflict and build peace
- Training community members in peace education, peace leadership, and conflict prevention and resolution
- Providing services that help integrate vulnerable populations into society
- Improving dialogue and community relations to determine how best to manage natural resources
- Funding graduate scholarships for career-minded professionals related to peacebuilding and conflict prevention

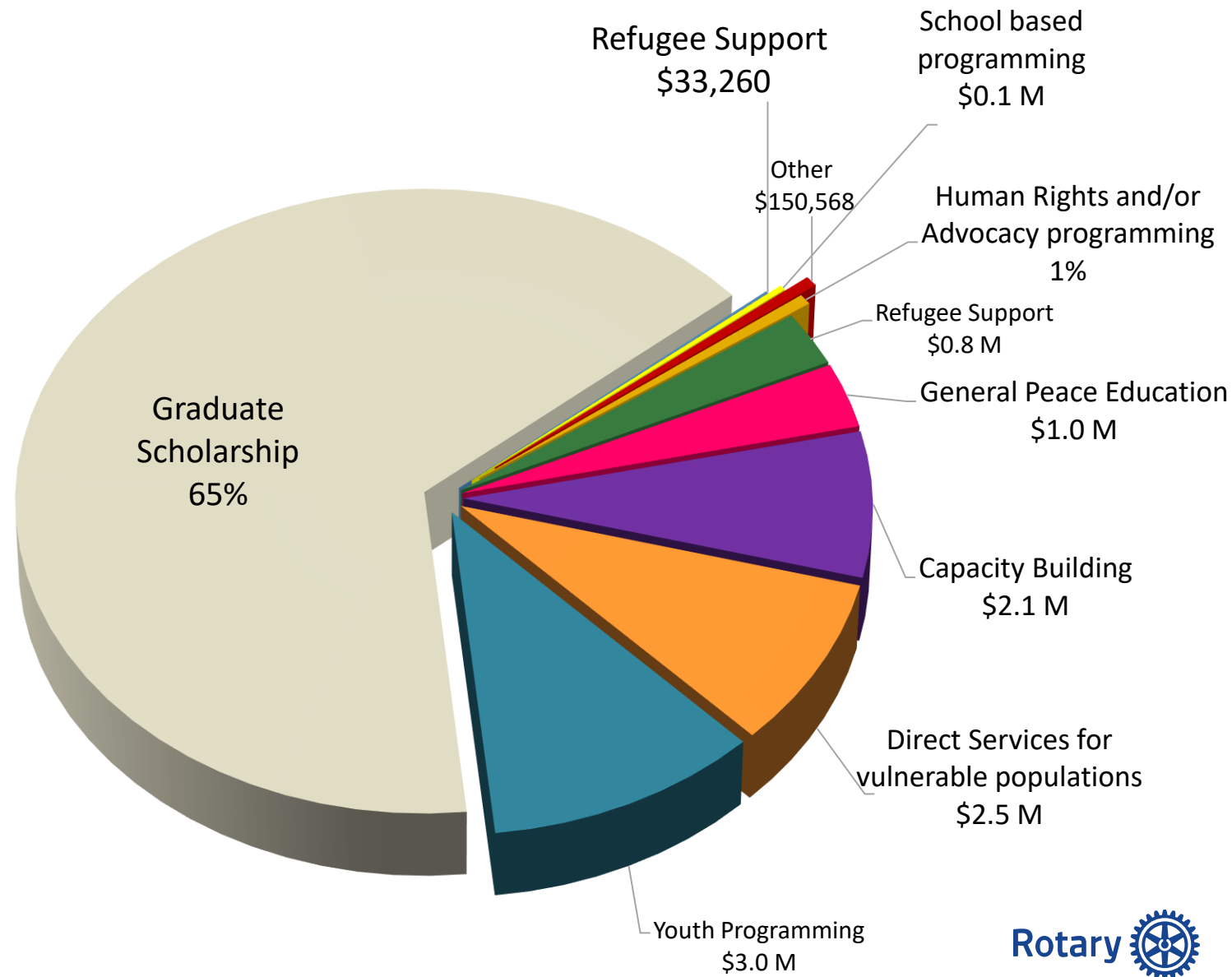
Rotary World Peace Fellows at ICU

PCP Global Grant Funding – Year to Year RY2014-21





PCP Global Grant Funding by Project Type RY2014-21





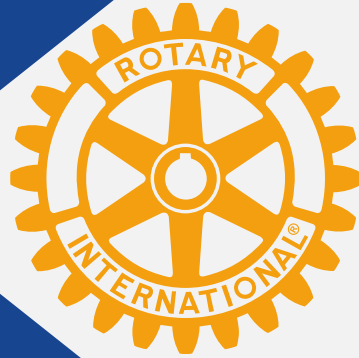
Project Highlight: Positive Peace Workshops

Through the strategic partnership between Rotary International and the Institute for Economics and Peace (IEP), Rotarians in Mexico and Colombia held workshops designed to build skills and form Positive Peace coalitions in both Mexico and Colombia. The main goal of the both projects was to establish networks of local Positive Peace champions that can work together to bring systemic change to their communities



WATER, SANITATION & HYGIENE





TRF Global Grants (2014-21)

\$154.4 Million

2,153 grants

6 CLEAN WATER AND SANITATION



**WATER, SANITATION,
AND HYGIENE**

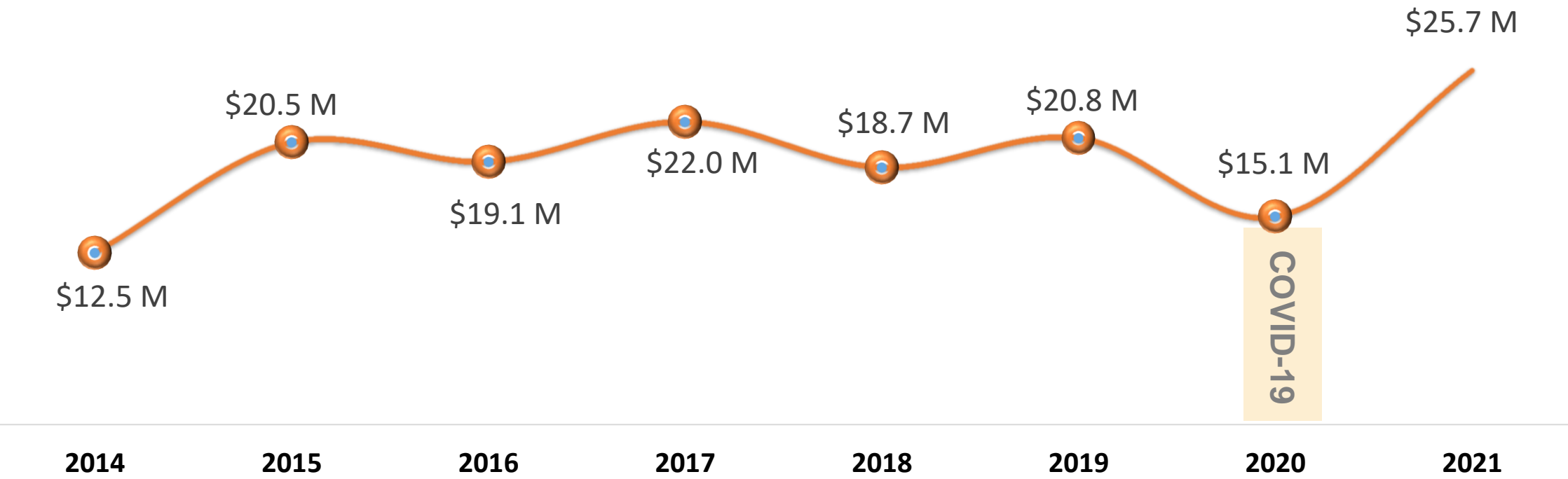
Rotary's AOF

Increasing sustainable access to water, sanitation and hygiene

- Facilitating universal and equitable access to safe and affordable drinking water and improving water quality by protecting and maintaining surface- and groundwater resources, and promoting wastewater reuse
- Facilitating universal and equitable access to improved sanitation and waste management services
- Improving community hygiene knowledge, behaviors, and practices
- Strengthening the capacity of governments, institutions, and communities to develop, finance, manage, and maintain sustainable water and sanitation services
- Funding graduate scholarships for career-minded professionals related to water, sanitation, and hygiene

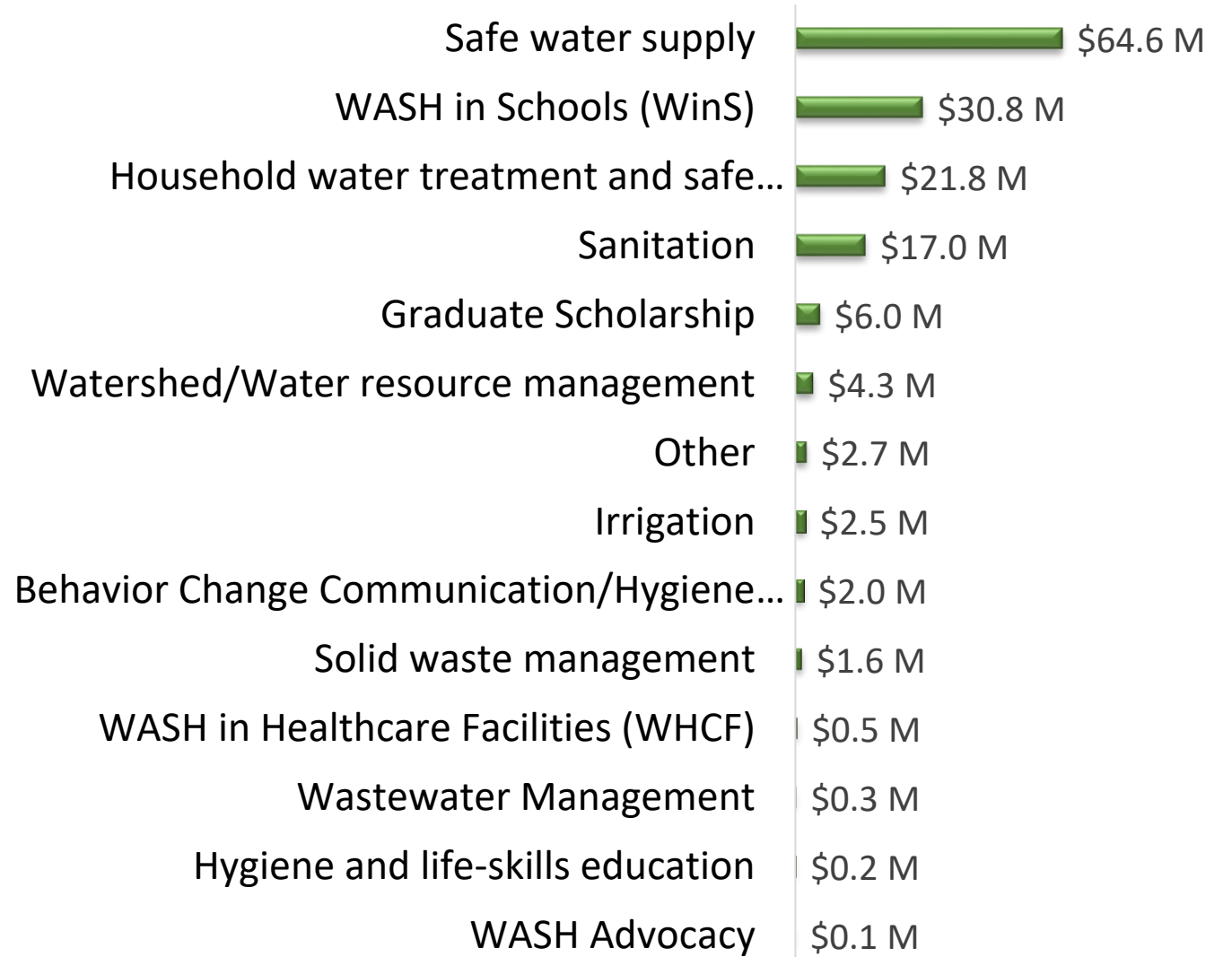


PCP Global Grant Funding Year by Year RY2014-21





Global Grant Funding by PCP Project Type RY2014-21





Project Highlight

WASH in Schools Phase III Tocoa

In partnership with community organizations and local authorities, WASH in Schools Phase III Tocoa targeted 14 schools in Honduras' underserved northeastern Colon region. In addition to new and improved toilets and hand washing stations, 300 teachers received training in integrating WASH elements in the curriculum to support the adoption of healthy behaviors among the approximately 5,000 students.

- Rotarians identified needs through 100+ individual surveys between May and October 2017 and again in 2019.
- Indicators measured during and after the project included functionality and performance of infrastructure, behavior changes and governance of WASH committees.
- Host clubs handled the project's day-to-day management with a Rotarian Program Manager based in Tocoa, Project Committees which met monthly, and a Rotarian dedicated to each school for biweekly monitoring visits.



THE ENVIRONMENT (Since July 2021)





7 AFFORDABLE AND
CLEAN ENERGY



9 INDUSTRY, INNOVATION
AND INFRASTRUCTURE



11 SUSTAINABLE CITIES
AND COMMUNITIES



12 RESPONSIBLE
CONSUMPTION
AND PRODUCTION



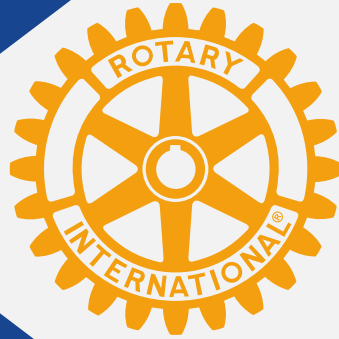
13 CLIMATE
ACTION



14 LIFE
BELOW WATER



15 LIFE
ON LAND



TRF Global Grants (2014-20)

\$18 Million

with environmentally-impactful projects within the other 6 AOFs

Rotary's AOF

Protecting, preserving and conserving the environment

- Protecting and restoring land, coastal, marine and freshwater resources
- Enhancing the capacity of communities and local governments to support natural resource management and conservation
- Supporting agroecology, sustainable agriculture, and natural material sourcing to improve ecological health
- Sustainable fishing and aquaculture practices
- Addressing the underlying causes of climate degradation and supporting solutions to reduce the emission of greenhouse gases
- Strengthening the resilience of ecosystems and communities affected by climate change



ENVIRONMENT

CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING

~~~~~  
**THE ROTARY FOUNDATION**

1. Club Qualification
2. Club Officer Responsibilities
3. Financial Management Plan
4. Bank Account Requirements
5. Report on Use of Grant Funds
6. Document Retention
7. Reporting Misuse of Grant Funds

### **1. Club Qualification**

To participate in Rotary Foundation grants, the club must agree to implement the financial and stewardship requirements in this memorandum of understanding (MOU) provided by The Rotary Foundation (TRF) and to send at least one club member to the district's grant management seminar each year. The district may also establish additional requirements for club qualification and/or require its clubs to be qualified in order to participate in district grants. By completing these requirements, the club becomes qualified and eligible to participate in Rotary grants.

- A. Upon successful completion of the qualification requirements, the club will be qualified for one Rotary year.
- B. To maintain qualified status, the club must comply with this MOU, any additional district requirements, and all applicable TRF policies.
- C. The club is responsible for the use of funds for club-sponsored grants, regardless of who controls the funds.
- D. Qualification may be suspended or revoked for misuse or mismanagement of grant funds involving, but not limited to: fraud; forgery; membership falsification; gross negligence; endangerment of health, welfare, or safety of beneficiaries; ineligible contributions; use of funds for personal gain; undisclosed conflicts of interest; monopolization of grant funds by individuals; report falsification; overpricing; acceptance of payments from beneficiaries; illegal activities; use of grant funds for ineligible purposes.
- E. The club must cooperate with any financial, grant, or operational audits.

### **2. Club Officer Responsibilities**

The club officers hold primary responsibility for club qualification and the proper implementation of TRF grants.

Club officer responsibilities include:

- A. Appointing at least one club member to implement, manage, and maintain club qualification
- B. Ensuring that all TRF grants adhere to stewardship measures and proper grant management practices
- C. Ensuring that all individuals involved in a grant conduct their activities in a way that avoids any actual or perceived conflict of interest



### **3. Financial Management Plan**

The club must have a written financial management plan to provide consistent administration of grant funds.

The financial management plan must include procedures to:

- A. Maintain a standard set of accounts, which includes a complete record of all receipts and disbursements of grant funds
- B. Disburse grant funds, as appropriate
- C. Maintain segregation of duties for handling funds
- D. Establish an inventory system for equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities
- E. Ensure that all grant activities, including the conversion of funds, comply with local law

### **4. Bank Account Requirements**

In order to receive grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- A. The club bank account must:
  - 1. Have a minimum of two Rotary member signatories from the club for disbursements
  - 2. Be a low- or noninterest-bearing account
- B. Any interest earned must be documented and used for eligible, approved grant activities, or returned to TRF.
- C. A separate account should be opened for each club-sponsored grant, and the name of the account should clearly identify its use for grant funds.
- D. Grant funds may not be deposited in investment accounts including, but not limited to, mutual funds, certificates of deposit, bonds, and stocks.
- E. Bank statements must be available to support receipt and use of TRF grant funds.
- F. The club must maintain a written plan for transferring custody of the bank accounts in the event of a change in signatories.

### **5. Report on Use of Grant Funds**

The club must adhere to all TRF reporting requirements. Grant reporting is a key aspect of grant management and stewardship, as it informs TRF of the grant's progress and how funds are spent.

### **6. Document Retention**

The club must establish and maintain appropriate recordkeeping systems to preserve important documents related to qualification and TRF grants. Retaining these documents supports transparency in grant management and assists in the preparation for audits or financial assessments.

- A. Documents that must be maintained include, but are not limited to:
  - 1. Bank information, including copies of past statements
  - 2. Club qualification documents including a copy of the signed club MOU
  - 3. Documented plans and procedures, including:
    - a. Financial management plan
    - b. Procedure for storing documents and archives
    - c. Succession plan for bank account signatories and retention of information and documentation
  - 4. Information related to grants, including receipts and invoices for all purchases
- B. Club records must be accessible and available to Rotary members in the club and at the request of the district
- C. Documents must be maintained for a minimum of five years, or longer if required by local law

### **7. Reporting Misuse of Grant Funds**

The club must report any potential and real misuse or mismanagement of grant funds to the district. This reporting fosters an environment in the club that does not tolerate the misuse of grant funds.

**Authorization and Agreement**

*This memorandum of understanding is an agreement between the club and the district and acknowledges that the club will undertake measures to ensure the proper implementation of grant activities and proper management of TRF grant funds. By authorizing this document, the club agrees to comply with all of the conditions and requirements of the MOU.*

*On behalf of the Rotary/Rotaract Club of \_\_\_\_\_, the undersigned agree to comply with all of the conditions and requirements of the MOU for Rotary year \_\_\_\_\_ and will notify Rotary International District \_\_\_\_\_ of any changes or revisions to club policies and procedures related to these requirements.*


| Club President |  |
|----------------|--|
| Term           |  |
| Name           |  |
| Signature      |  |
| Date           |  |

| Club President-elect |  |
|----------------------|--|
| Term                 |  |
| Name                 |  |
| Signature            |  |
| Date                 |  |

# DOING GOOD IN THE WORLD! YOUR ROTARY FOUNDATION







**Our Mission:**  
**The Rotary Foundation helps**  
**Rotarians to advance world**  
**understanding, goodwill, and**  
**peace by improving health,**  
**providing quality education,**  
**improving the environment,**  
**and alleviating poverty.**

# DOING GOOD IN THE WORLD- THE ROTARY FOUNDATION EXCELS!



4  
star charity - Charity  
Navigator's highest level



91%  
of funds are spent  
directly on programs



# SUPPORTING OUR ROTARY FOUNDATION

---

Total raised in the 2020-21  
Rotary year



**\$440.9  
million**

As of 30 June 2021





# SUPPORTING THE ROTARY FOUNDATION



**PolioPlus Fund**  
End Polio Now



**Annual Fund**  
For Support Today



**Endowment Fund**  
To Secure Tomorrow

# “Largest Health Footprint in the World”

BILL & MELINDA  
GATES *foundation*



# POLIO MILESTONES

---



- Polio cases reduced by 99%
- 19.4 million people either walking or alive because the global polio eradication effort
- 122 countries have received support from PolioPlus grants
- Rotary has invested more than US\$2.2 billion in global polio eradication efforts
- “Delivering On A Promise” 2022-2026 GPEI Polio Eradication Strategy
- Afghanistan and Pakistan-Last TWO Countries
- Afghanistan Polio immunization continues



# Positioning To Achieve Eradication

- **IMMUNIZING MORE THAN 450 MILLION CHILDREN IN UP TO 60 COUNTRIES EACH YEAR**
- **FUNDING OVER 150,000 POLIO WORKERS IN UP TO 70 COUNTRIES EACH YEAR**
- **CONTINUING DISEASE ENVIRONMENTAL SURVEILLANCE ACTIVITIES IN MORE THAN 70 COUNTRIES**





**Your donation of \$25  
+ \$50 Gates Match  
= \$75 total  
contribution to fight  
polio**

**TRIPLE YOUR IMPACT WITH A DONATION TO POLIO,  
WITH THE GATES 2 TO 1 MATCH THIS YEAR**

# ANNUAL FUND- SUPPORTING SHARE AND AREAS OF FOCUS

- Primary funding source for Rotary Grants and Programs
- Contributions to Annual Fund SHARE generate District Designated Funds (DDF)
- Contributions are credited to the donor, donor's club, and applied to club's goal



# ANNUAL FUND SHARE



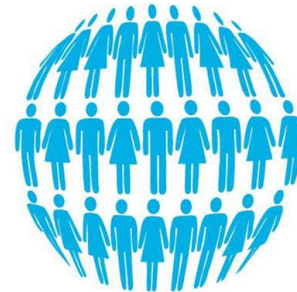
## Donation to Annual Fund **SHARE**

Donation is invested for 3 years; growth supports Foundation operations.



### SPENDING DECISIONS SHARED

#### **World Fund** (Trustee discretion)



GLOBAL  
GRANTS AND  
PROGRAMS\*

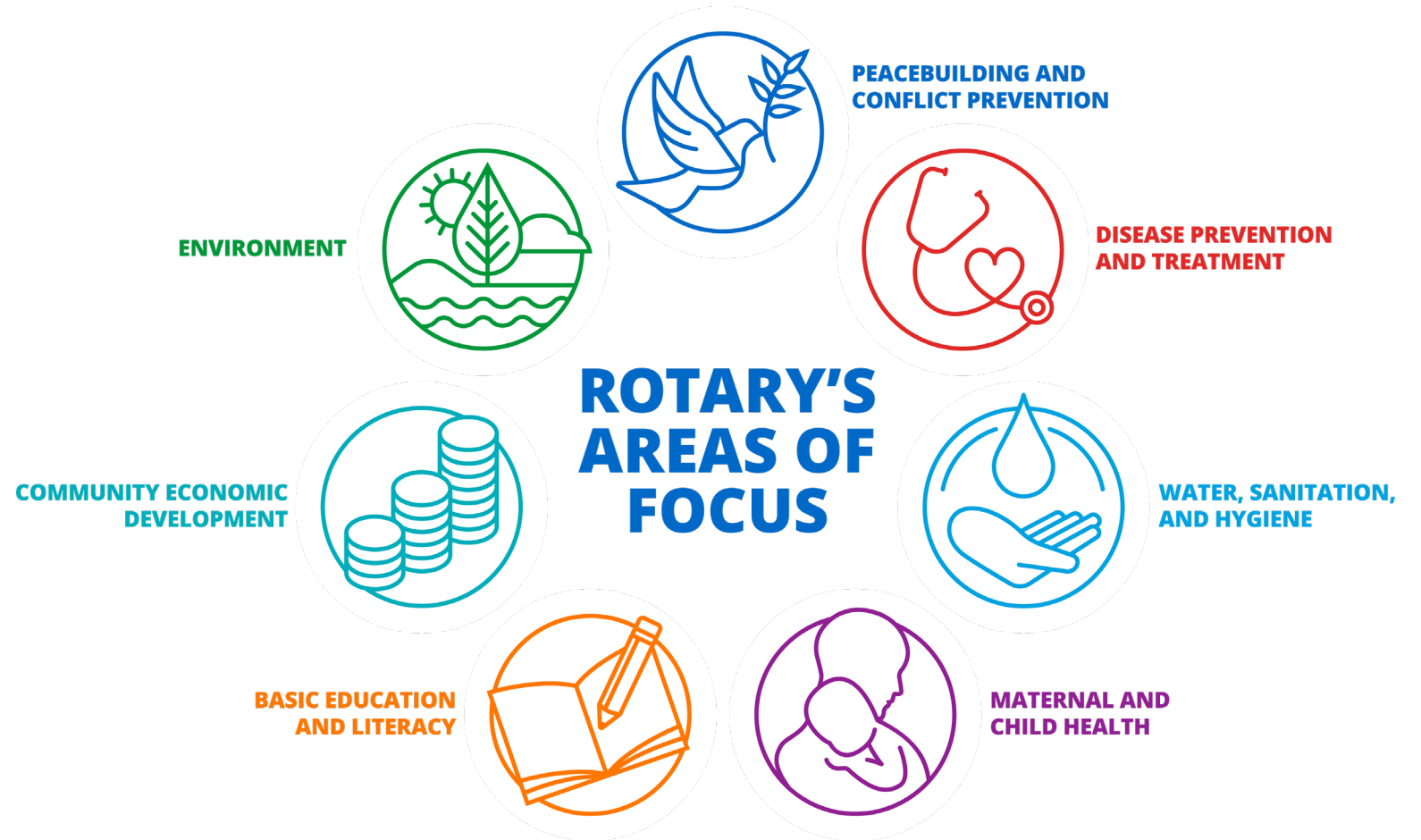
#### **District Designated Funds (DDF)** (District discretion)



DISTRICT  
GRANTS      GLOBAL  
GRANTS

\*Includes PolioPlus, Rotary Peace Centers, other districts, and the Endowment Fund (areas of focus)

# ROTARY AREAS OF FOCUS



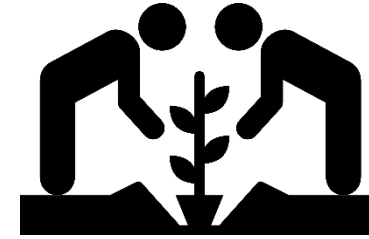
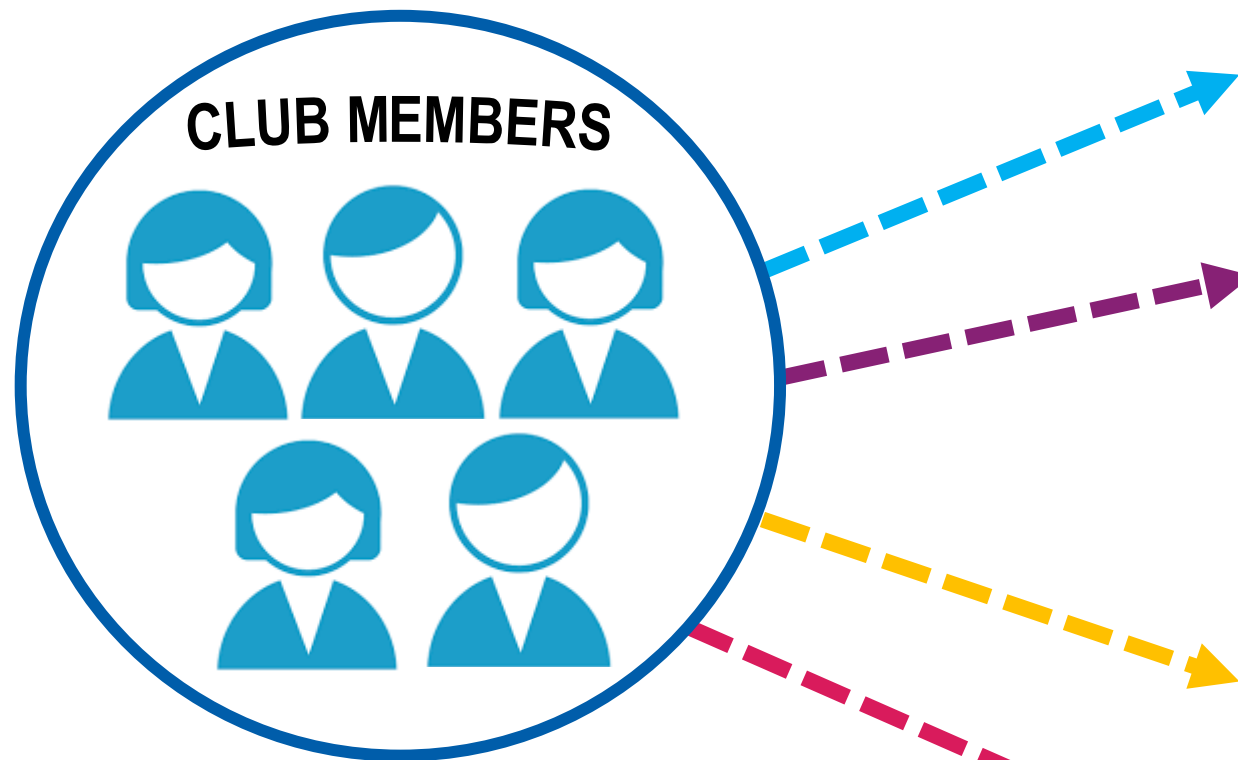


# HOW CAN I SUPPORT THE CAUSES I CARE ABOUT TODAY?

---

- Checks, Credit Cards
  - Rotary Direct
  - Pledge
  - Gift of Stock
- IRA (Qualified Charitable Distribution)
  - Donor Advised Fund

# THE ROTARY FOUNDATION IMPROVES THE MEMBER EXPERIENCE



## DISTRICT GRANT

Help a community



## GLOBAL GRANT

Make a bigger impact

# FEATURES OF A DISTRICT GRANT

- A single block grant awarded annually for club and district projects
- Local or international activities
- Local decision making with broader guidelines
- Smaller activities and projects
- Applications are handled at the District Level

# FEATURES OF A GLOBAL GRANT

- Align with an area of focus
- Respond to a community need- “Community Needs Assessment”
- Must have a host club in the country of the project and an international club
- Strengthen knowledge, skills, resources
- Have long-term, sustainable benefits
- Have measurable results
- Have a total budget of at least \$30,000
- Applications are processed through Rotary Foundation “Grants” Dept.



# DOING GOOD IN THE WORLD

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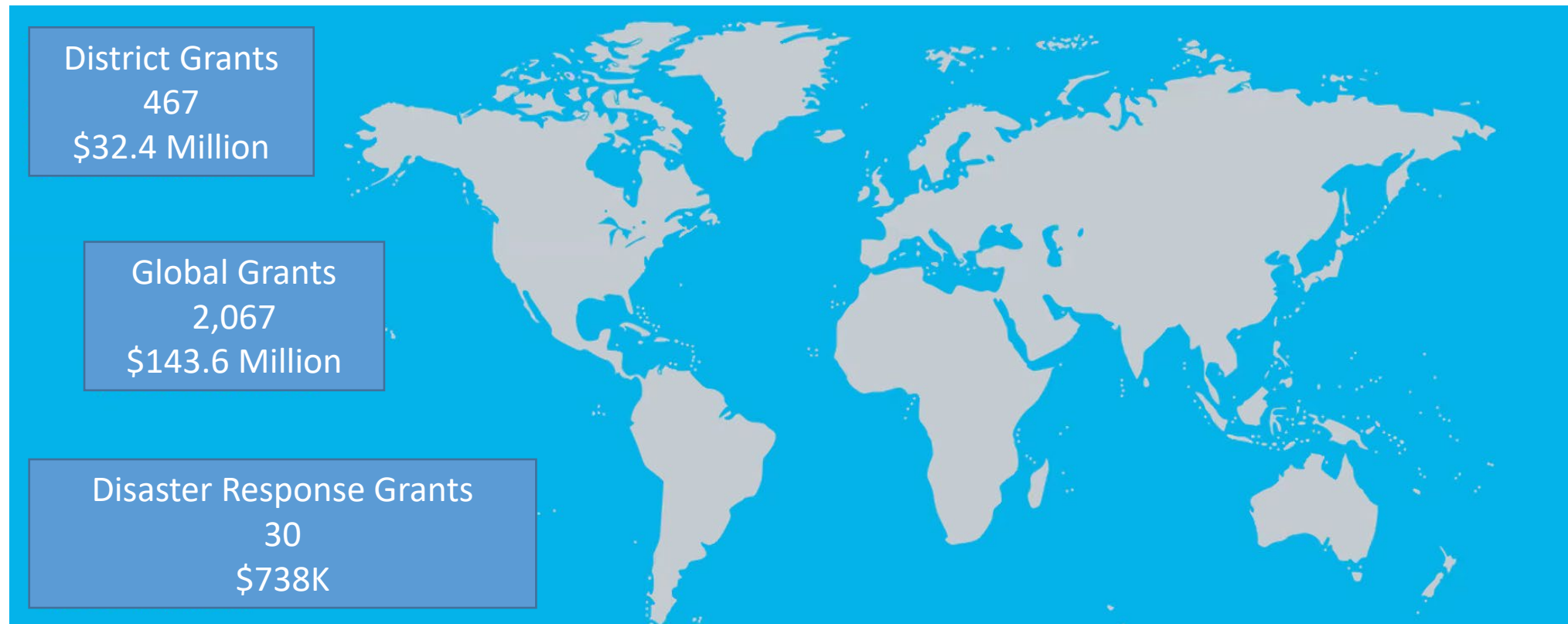
Total program awards in the  
2020-21 Rotary year



**\$332  
million**

As of 30 June 2021

# 2020-21 GRANT STATISTICS





# LEAVING A LEGACY

The Rotary Foundation Endowment

# HOW DOES THE ENDOWMENT WORK?

---

- Gifts Are Invested Forever
- Generate “Spendable Earnings” In Perpetuity
- Long Term Impact vs. Spent All At Once
- Personalize Your Gift



# DEFERRED GIFTS

---

Planned commitments to be paid later

## **Gift Options:**

- **Naming Rotary in a will or living trust**
- **Retirement plan beneficiary designation**
- **Life insurance beneficiary designation**
- **Life Income Agreements**
- **Donor Advised Funds**

# SETTING CLUB FOUNDATION GOALS

## **Prior to July 1, 2022**

Discuss your Annual Fund and Polio goals with your board

Determine/Design Fundraising(s) projects to reach your goals

Upload goals to “Rotary Club Central”

### **Foundation Reports to help with Goal Setting:**

- Club Recognition Summary
- Paul Harris Society Report
- Club Foundation Banner Report
- Club Fundraising Analysis Report
- Benefactor Report
- Major Donor, Arch Klumph Society, and Bequest Society Report

### **How to find the reports?**

**Go to MyRotary.org>sign in>Hover over “The Rotary Foundation>Click on Foundation Reports**

### **How to upload Rotary Foundation Goals?**

**Go to MyRotary.org>sign in>Hover over Member Center>Online Tools>Rotary Club Central>Goal Center>Rotary Foundation Giving**

# HOW CAN MY CLUB RAISE ANNUAL FUND AND POLIO SUPPORT?

## During Your Club Year

- Hold your fundraiser(s)
- Engage ALL Club Members in Fundraising
- Advocate for our Foundation during club meetings: “Foundation Minute”
- [Use “Raise For Rotary”](#) Online Rotary Fundraising Platform
- Celebrate success and Thank Club Members!
- Lead by example and make a personal gift every year “Will You Join Me”



# ZONE AND DISTRICT RESOURCES

## District 7610:

- District Rotary Foundation Chair
- District Grant Chair
- District Global Grant Chair
- District Polio Chair
- District Major Donor Chair
- District Endowment Chair
- District Paul Harris Society Chair
- Area Foundation Advocate
- Club Foundation Chair
- Dacdb

## Zone 33:

- Zone 33 Rotary Regional Foundation Chair (RRFC)
- Zone 33 Assistant Rotary Regional Foundation Chair (ARRFC)
- Zone 33 Endowment/Major Gift Advisor (E/MGA)
- Zone 33 End Polio Now Coordinator (ENPC)
- [www.rizones33-34.org](http://www.rizones33-34.org)



# THE ROTARY FOUNDATION RESOURCES

- [Rotary Support Center](#) 866-976-8279
- [Rotary Videos](#) (Vimeo) [Rotary Videos](#) (YouTube)
- [My Rotary.org](#)
  - Reports, Forms, Information
- [Rotary Learning Center](#)
  - Online, On Demand
- Rotary Publications
  - [The Rotary Foundation Reference Guide](#)
  - [Understanding Foundation Recognition Points](#) (PHF)
  - [The Rotary Foundation Annual Reports](#)
  - [123 Contribution Form](#)
  - Multi Donor Form
  - [Rotary Direct FAQ's](#)
- Rotary Staff
  - AGO Bryan Hulscher [Bryan.Hulscher@Rotary.org](mailto:Bryan.Hulscher@Rotary.org)
  - MGO Laurie Menzel [Laurie.Menzel@Rotary.org](mailto:Laurie.Menzel@Rotary.org)

# PAUL HARRIS FELLOW

## PAUL HARRIS SOCIETY



**Rotarians achieve PHF-  
PHF+8 at subsequent \$1000  
levels (\$1=1 Point):**

- **Personal Contributions to Annual Fund, Polio, or approved Global Grant**
- **Receiving Points from other Rotarians**
- **Club and District Matching Programs**



**A Rotarian receives PHS  
recognition when they notify  
TRF of their intention to  
contribute \$1,000 cash each  
year to the Annual Fund,  
PolioPlus, or approved Global  
Grant**

# CLUB RECOGNITION

- **100% Foundation Giving Club**

- Achieve an average of \$100 per capita giving and 100% participation, with every dues-paying member contributing at least \$25 to any or all of the following: Annual Fund, Polio Plus, approved Global Grant or Endowment Fund

- **100% Every Rotarian, Every Year Club (EREY)**

- Minimum Annual Fund contribution of \$100 per capita and every dues-paying member must personally contribute at least \$25 to Annual Fund during the year

# CLUB RECOGNITION

- **Top Three Per Capita Clubs in Annual Fund Giving**

- Clubs must achieve a minimum of \$50 in per capita annual giving

- **100% Paul Harris Fellow Club**

- Every dues paying member must be a Paul Harris Fellow. This is a one-time only award.

## **100% Paul Harris Society Club**

- Every dues paying member has contributed a minimum of \$1,000 to the Annual Fund, PolioPlus Fund or approved Global Grant during the Rotary year

## **100% Rotary's Promise Club**

- Every club member has included The Rotary Foundation in an estate plan or made an outright gift of \$1,000 or more to the Rotary Endowment



“You don’t imagine yesterday, you imagine tomorrow.”

RI President Elect, Jennifer Jones



**IMAGINE  
ROTARY**



Laurie Menzel, Major Gifts Officer  
Laurie.Menzel@Rotary.Org  
847.425.5601



# THE ROTARY FOUNDATION

## 2020-21 FOUNDATION GIVING GOALS

EN-(1112)  
EVERY  
ROTARIAN  
EVERY  
YEAR

Please visit MyRotary/Rotary Club Central to set your goals: <https://map.rotary.org/en/selfservice/Pages/login.aspx>

Club Name (please print)

Club Number/District

2019-20 Club President's Name (please print)

E-mail

| ANNUAL FUND                                                                                                                                                                                                               |                             |                             |                |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-----------------------------|----------------|
| Your Annual Fund contributions support humanitarian and educational programs both locally and internationally. Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals. |                             |                             |                |
| Calculate your club's Annual Fund goal by multiplying the number of individual donors times the average contribution amount and adding all of the goal totals.                                                            |                             |                             |                |
| Giving Level                                                                                                                                                                                                              | Number of Individual Donors | Average Contribution Amount | Goal Total USD |
| Paul Harris Society<br>(1000 USD or more)                                                                                                                                                                                 |                             |                             |                |
| Sustaining Members<br>(100 USD or more)                                                                                                                                                                                   |                             |                             |                |
| Every Rotarian, Every Year<br>(25 to 100 USD)                                                                                                                                                                             |                             |                             |                |
| Other Contributions<br>(Fundraising events, corporate gifts etc.)                                                                                                                                                         |                             |                             |                |
| <b>ANNUAL FUND GOAL TOTAL</b>                                                                                                                                                                                             |                             | <b>USD</b>                  |                |
| POLIOPLUS FUND                                                                                                                                                                                                            |                             |                             |                |
| As funding is a critical concern in the effort to eradicate polio, Rotarians are asked to continue supporting the program until we reach our ultimate goal: the global certification of polio eradication.                |                             |                             |                |
| Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals.                                                                                                                |                             |                             |                |
| <b>POLIOPLUS GOAL</b> <small>TJL;T)</small>                                                                                                                                                                               |                             |                             |                |
| (One collective goal for the entire club)                                                                                                                                                                                 |                             |                             |                |
| MAJOR GIFTS AND ENDOWMENT FUND                                                                                                                                                                                            |                             |                             |                |
| Indicate the number of club members interested in making an outright gift of 10,000 USD or more and those interested in including the Endowment Fund in their estate plan.                                                |                             |                             |                |
| <b>Number of new Major Gifts:</b><br>(00,000 USD or more outright)                                                                                                                                                        |                             |                             |                |
| <b>Number of new Bequest Society Members:</b><br>(Minimum 10,000 USD commitment in estate plan)                                                                                                                           |                             |                             |                |
| <b>Number of new Benefactors:</b><br>(Minimum 1,000 USD outright gift or commitment in estate plan)                                                                                                                       |                             |                             |                |

The Rotary Foundation of Rotary International (FN500)  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA

[www.rotary.org](http://www.rotary.org)

## 2020-21 FOUNDATION GIVING CLUB GOAL-SETTING INSTRUCTIONS

Clubs should also use the Rotary Club Central tool to submit goals: <https://m.ap.rotary.org/en/selfservice/Pages/login.aspx>

Club presidents-elect are asked to set goals for the Annual Fund, PolioPlus, major gifts and the Endowment Fund.

### Setting your 2020-21 Annual Fund goal

The Annual Fund is the source of funding for many of The Rotary Foundation's humanitarian and educational programs. Rotary clubs are encouraged to set Annual Fund goals that include participation from every member and friends of Rotary at 3 giving levels:

1. Paul Harris Society: cumulative contributions of 1,000 USD or more
2. Sustaining Member: cumulative contributions of 100 USD or more
3. Every Rotarian, Every Year: contributions 25 up to 100 USD

In addition to individual donors, other contributions from club fundraisers, corporate and community gifts may be included in the club's total Annual Fund goal.

- Consult with your district governor-elect and training team to assess your club's fundraising potential.
- Review your club's EREY Eligibility Report to assess your members' current and past giving levels.
- Review your district's Monthly Contribution Report with your club leader to set your 2019-20 Annual Fund Goal.

### Setting your 2020-21 PolioPlus goal

In figuring your club's PolioPlus goal, your club should consider the following sources of financial support:

- Community fundraising events, Interact club fundraisers, Rotaract club fundraisers
- Family of Rotary (Foundation alumni, Rotary Fellowships, new club members since 2005)
- Business/corporate donations
- Major Gifts (US\$10,000 or more)
- Other (club and district foundations, etc.)

\* *Contributions to PolioPlus do not count toward your Annual Fund goal or club banner recognition. Contributions do qualify for Paul Harris Fellow and Major Donor Recognition.*

### Setting your 2020-21 Major Gifts and Endowment Fund goals

In addition to outright contributions to the Annual Fund, all Rotarians are encouraged to invest in tomorrow by designating an outright contribution or a portion of their estate to the Endowment Fund, the Foundation's endowment. Individuals can become a Benefactor or Bequest Society Member by including the Endowment Fund in their estate plan. Endowment Fund goals include both Benefactors and Bequest Society Members.

Evaluate the financial capacity of your club membership to identify potential major gifts to the Endowment Fund.

Consult with your district governor-elect and training team to assess your club's potential for supporting the Endowment Fund.

- Review your club's Benefactor and Bequest Society lists with your club leader to set your 2019-20 Endowment Fund goals.
- \*\* *Contributions and commitments to the Endowment Fund do not count toward your Annual Fund or PolioPlus goals, Paul Harris Fellow recognition, or club banner recognition.*

### Submitting your 2020-21 Foundation Giving goals

- Please complete this form and bring it to PETS on March 3, 2020 and give it to DRFC Ronnie Chankter, [drfc7610@cox.net](mailto:drfc7610@cox.net)
- Club Presidents-elect must also enter their goals in MyRotary: Rotary Club Central at [www.rotary.org](http://www.rotary.org)



The Rotary Foundation  
of Rotary International (FN500)  
1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
Phone: 1-866-976-8279  
Fax: 1-847-328-5260  
E-mail: [erey@rotary.org](mailto:erey@rotary.org)  
[www.rotary.org](http://www.rotary.org)

# CLUB ROTARY FOUNDATION COMMITTEE CHAIR JOB DESCRIPTION



Your chief responsibility as chair of your club's Rotary Foundation committee is to inspire your club's members to give to the Foundation and participate in its activities. Find more information about these duties in the accompanying documents.

| RESPONSIBILITIES                                                                                                                |                                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| GENERAL                                                                                                                         | CLUB ROTARY FOUNDATION COMMITTEE                                                                                   |
| Attend your district training assembly.                                                                                         | Promote Foundation grants and activities and help members participate in them.                                     |
| Work with the president-elect to select and prepare your committee members.                                                     | Inspire club members to give to The Rotary Foundation.                                                             |
| Create subcommittees as needed (e.g., global and district grants, fundraising, annual giving, PolioPlus, Rotary Peace Centers). | Attend the grant management seminar to ensure that your club qualifies for Rotary Foundation global grants.        |
| Meet regularly and plan activities.                                                                                             | Oversee the global grants qualification process.                                                                   |
| Set committee goals that will help achieve the club's annual goals, and monitor progress toward them.                           | Conduct inspirational, Foundation-focused club programs at least four times a year.                                |
| Manage your committee's budget.                                                                                                 | Work with your treasurer to manage any Rotary grant funds your club receives.                                      |
| Work with your club's other committees and your district committee on multiclub activities or initiatives.                      | Work with your district's international service chair and service projects committee to develop and fund projects. |
| Provide committee updates to your club, including the club president and its board of directors.                                | Work with your treasurer to submit donations to the Foundation in an accurate and timely manner.                   |
| Determine what your club expects of your committee.                                                                             | Work with your club's membership committee to ensure a positive club image and experience.                         |





# PAUL HARRIS FELLOW RECOGNITION TRANSFER REQUEST FORM

Please send your completed form only once. If you have questions regarding recognition or contributions to The Rotary Foundation, please contact Rotary's Support Center at 1-866-9ROTARY (1-866-976-8279), or email [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org), or contact the Rotary International office that serves your area.

Contributions can be made at [rotary.org/give](http://rotary.org/give).

## 1. RECIPIENT OF RECOGNITION

Transfer Recognition Points to:

Name: \_\_\_\_\_ Recipient ID Number: \_\_\_\_\_  
 Club Name: \_\_\_\_\_ Club No.: \_\_\_\_\_ District No.: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State/Province: \_\_\_\_\_  
 Country: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
 Daytime Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

## 2. TRANSFER RECOGNITION POINTS

Foundation Recognition Points Amount: \_\_\_\_\_ (Minimum of 100 points)

Transferring Recognition Points from: ☐ Individual ID Number: \_\_\_\_\_ ☐ Club Number: \_\_\_\_\_ ☐ District Number: \_\_\_\_\_

AUTHORIZED SIGNATURE (required): \_\_\_\_\_ Print Name: \_\_\_\_\_

## 3. SHIPPING INFORMATION — Recognition materials only

Presentation Date: \_\_\_\_\_

Send recognition to (Check one; if left blank, recognition will be sent to club president):

☐ Club President ☐ Club Secretary ☐ Club Treasurer ☐ Club Foundation Chair ☐ Other, record information below

Name: \_\_\_\_\_ Address: \_\_\_\_\_  
 City, State/Prov.: \_\_\_\_\_ Country, Postal Code: \_\_\_\_\_  
 Daytime Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

## 4. INDIVIDUAL COMPLETING THIS FORM

Name: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_  
 Email Address: \_\_\_\_\_ Date: \_\_\_\_\_

Please send this form to the appropriate address.

### UNITED STATES

The Rotary Foundation  
 14280 Collections Center Drive  
 Chicago, IL 60693 USA  
 Tel: 1-866-976-8279 (toll-free)  
 Fax: +1-847-328-4101  
[rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org)

### CANADA

The Rotary Foundation (Canada)  
 c/o 911600  
 P.O. Box 4090 STN A  
 Toronto, ON M5W 0E9  
 Canada  
 Tel: 1-866-976-8279 (toll-free)  
 Fax: +1-847-328-4101  
[rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org)

### GERMANY

Rotary Deutschland  
 Gemeindienst e. V.  
 Kreuzstraße 34  
 40210 Düsseldorf  
 Germany

### RI BRAZIL OFFICE

Rotary International  
 Condomínio Comercial Casa das  
 Caldeiras  
 Av. Francisco Matarazzo, 1752,  
 conj. 1421  
 Água Branca  
 São Paulo, SP  
 05001-200 Brazil  
 Tel: (55-11) 3217-2630  
[fr.brasil@rotary.org](mailto:fr.brasil@rotary.org)

### RI EUROPE AND AFRICA OFFICE

Rotary International  
 Witikonstrasse 15  
 CH-8032 Zurich  
 Switzerland  
 Tel: (41-44) 387 71 11  
 Fax: (41-44) 422 50 41  
[eao@rotary.org](mailto:eao@rotary.org)

### RI JAPAN OFFICE

Rotary International  
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# UNDERSTANDING FOUNDATION RECOGNITION POINTS

## What are Foundation recognition points and how can I accumulate them?

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the [Annual Fund](#) or [PolioPlus](#), or who contribute to sponsorship of a Foundation grant. Donors receive one recognition point for every U.S. dollar contributed to these funds. Contributions to the [Endowment Fund](#) are not eligible.

Donors can transfer Foundation recognition points to others to help them qualify as a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor's death, unless the points are transferred, or until the donor uses them (the surviving spouse of a Major Donor may also use the points).

## How do I transfer Foundation recognition points?

A minimum of 100 Foundation recognition points must be transferred at a time, and you must complete and sign the [Recognition and Transfer Request](#). The points may not be transferred from individuals to a club or district.

- Individual donors are the only ones authorized to transfer recognition points from their individual account.
- Club presidents are the only ones authorized to transfer recognition points from a club account.
- District governors are the only ones authorized to transfer recognition points from a district account.

## Can Foundation recognition points of deceased Rotarians be transferred?

No. These points expire unless the deceased Rotarian was a [Major Donor](#), in which case, the spouse/partner maintains control of the Foundation recognition points during his or her lifetime.

## Can a business or organization become a Paul Harris Fellow?

No. Only individuals can become Paul Harris Fellows. However, businesses and organizations can receive a Certificate of Appreciation for contributions of \$1,000 or more, or transfers of 1,000 points or more.

## Can a deceased person become a Paul Harris Fellow?

Yes. A donor can recognize a deceased individual by requesting a Memorial Paul Harris Fellow designation.

## Do Foundation recognition points count toward Major Donor recognition?

No. Only cumulative personal outright contributions count toward [Major Donor recognition](#).

## How are Foundation recognition points tracked?

Your club and district leaders can view the online **Club Recognition Summary**, which includes the recognition amount, tally of recognition points, current Paul Harris Fellow level, and date that level was achieved.

Through your My Rotary account, you can view your personal contribution history, recognition amount, and available Foundation recognition points. You can request a copy of your **Donor History Report** from the Foundation at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

## On the Club Recognition Summary, what is the difference between recognition amount and available Foundation recognition points?

**Recognition amount** reflects the total Paul Harris Fellow recognition you have accumulated through your personal contributions plus all recognition points you've been given by other individuals, clubs, or districts. Recognition points given to you don't count toward Major Donor recognition. The maximum amount that can be shown on the Club Recognition Summary report is 9,000; the "+" sign indicates that the actual amount exceeds the 9,000-point maximum.

**Available Foundation recognition points** reflects points you have accumulated through personal outright giving to the Foundation. All points listed can be transferred to other individuals for Paul Harris Fellow recognition.

## Can clubs or districts accumulate Foundation recognition points?

Yes. Clubs can view their recognition points in the **Club Recognition Summary**.

Districts' Foundation recognition points are shown in the **Donor History Report**. Districts may request the report at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

## How can I use Foundation recognition points to increase giving to the Foundation?

Matching outright contributions with Foundation recognition points may help your club reach or even surpass its Annual Fund goal, as well as achieve 100% Paul Harris Fellow recognition.

To determine whether your club is close to achieving 100% Paul Harris Fellow status, review the recognition amounts of all Rotarians currently listed as active club members in the Club Recognition Summary.

To determine whether you're close to achieving your Annual Fund goal, review the **Monthly Contribution Report**.

## What recognition opportunities are available with Foundation recognition points?

### Paul Harris Fellow

Paul Harris Fellow recognition is extended to any individual who contributes, outright or cumulatively (or in whose name is contributed), \$1,000 or more to the Annual Fund or PolioPlus or as sponsorship of a portion of a Foundation grant. The recognition consists of a certificate and pin. In addition, [Paul Harris Fellow medallions](#) can be ordered at [shop.rotary.org](http://shop.rotary.org).



### Multiple Paul Harris Fellow

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

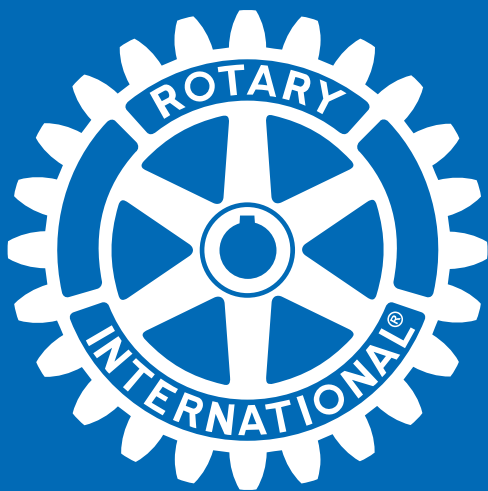
- \$2,000 to 2,999.99 - one sapphire
- \$3,000 to 3,999.99 - two sapphires
- \$4,000 to 4,999.99 - three sapphires
- \$5,000 to 5,999.99 - four sapphires
- \$6,000 to 6,999.99 - five sapphires
- \$7,000 to 7,999.99 - one ruby
- \$8,000 to 8,999.99 - two rubies
- \$9,000 to 9,999.99 - three rubies



### Certificate of Appreciation

A Certificate of Appreciation is given to a business or organization in whose name a donor contributes \$1,000 or more.





THE ROTARY FOUNDATION  
**REFERENCE  
GUIDE**





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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.

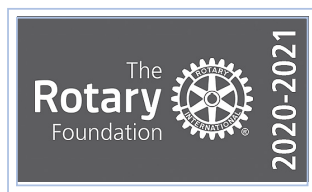
On [My Rotary](#), you can view your Donor History Report, which includes your personal contribution history and recognition summary. You can also request this report by emailing [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

## 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.





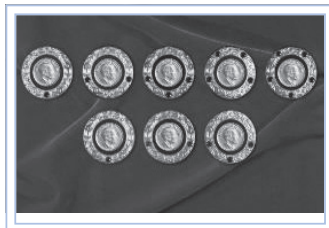
## Certificate of Appreciation

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.

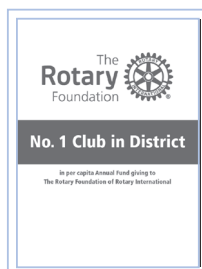
### **100% Every Rotarian, Every Year Club**

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 Klumpp Society brochure](#): Information about the Arch Klumpp 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 Klumpp 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](https://www.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.  
Kreuzstrasse 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](http://Rotary.org)

219-EN—(1220)



# TERMS AND CONDITIONS FOR ROTARY FOUNDATION DISTRICT GRANTS AND GLOBAL GRANTS

The Rotary Foundation may modify these terms and conditions at any time to reflect policy changes and to add clarity. Changes made as of July 2021 include:

- Changing the World Fund match for DDF contributions for global grants to 80 percent (see section VI)

You can find additional updates and resources at [rotary.org/grants](https://rotary.org/grants).

## **I. WHAT WE FUND**

The Rotary Foundation funds district grants and global grants. We distribute district grants as lump sums that pay for scholarships, travel, and projects that all align with our mission. That mission is to help Rotarians contribute to world understanding, goodwill, and peace by improving people's health, supporting education, and alleviating poverty. We fund global grants for international graduate-level scholarships, vocational training teams, and projects that have measurable goals, are sustainable and based on community needs, and are centered on at least one of our areas of focus.

## **II. ELIGIBILITY GUIDELINES**

All Foundation grant activities need to:

1. Relate to the Foundation's mission
2. Include active participation from Rotarians
3. Exclude The Rotary Foundation or Rotary International from any liability beyond the amount funded by the grant
4. Comply with the laws of both the United States and the area where the grant will be carried out and cause no harm. If you sponsor projects in or plan travel to countries sanctioned by the U.S. Treasury Department's Office of Foreign Assets Control, you may need to supply more information.
5. Be reviewed and approved by the Foundation before being implemented. You can't use grants to reimburse clubs or districts for activities and expenses that are in progress or already completed. We encourage you to plan for activities before a grant is approved, but don't incur any expenses. If you want to alter a project after a grant is approved, the Foundation also needs to approve those changes before they are carried out.
6. Demonstrate sensitivity to the traditions and culture of the area where a project will be carried out



7. Comply with the Conflict of Interest Policy for Program Participants as outlined in section 30.040. of [The Rotary Foundation Code of Policies](#) and in Section XIV below.
8. Comply with Rotary International's policies for the use of the name "Rotary" and other Rotary logos, emblems, and graphics, as outlined in sections 34.040.6. and 34.040.11. of the [Rotary Code of Policies](#).
9. Include [signs](#) on or near projects that identify the role of the grant sponsors and The Rotary Foundation, as outlined in section 40.010.2. of [The Rotary Foundation Code of Policies](#) and in accordance with Rotary's [Voice and Visual Identity Guidelines](#).
10. Follow Rotary's Privacy Statement for Personal Data outlined in section 26.080. of the [Rotary Code of Policies](#). Don't include the personal data (name, age or date of birth, or other identifying information) of grant beneficiaries or images of them in grant applications and reports unless the Foundation requests it and you have the written consent of the beneficiary (or their parent or legal guardian). Inappropriately including that personal data can cause delays in the grant process while we ensure compliance with [Rotary's Privacy Policy](#).

### **District grants**

In addition to the eligibility criteria listed above, district grants:

1. Support local and international projects, scholarships, vocational training teams, and related travel
2. May fund scholar and vocational training team orientation and grant management seminars
3. May pay for travel to and participation in Rotary project fairs to help clubs and districts find partners
4. Fund projects and activities both in countries where Rotary has clubs and in areas where we do not, and in geographic areas where permitted by law and in accordance with Foundation policies.
5. May be used to support [Rotary Youth Exchange](#), [RYLA](#), [Rotary Friendship Exchange \(with vocational emphasis\)](#), [Rotaract](#), [Interact](#), and [New Generations Service Exchange](#) programs
6. May fund the costs associated with conducting community assessments
7. May fund construction and renovation

### **Global grants**

In addition to the eligibility criteria listed above, global grants:

1. Support activities that align with one or more of Rotary's [areas of focus](#). These activities include humanitarian projects, international scholarships to fund graduate-level coursework or research for one to four academic years, and/or vocational training teams that address a humanitarian need by providing professional training.
2. Benefit communities in countries and geographical areas where Rotary has clubs
3. Are based on the needs of the community where a project will be carried out. Any club or district that applies for a global grant to support a humanitarian project or a vocational training team needs to conduct a community assessment and design the project with the host community in response to the results. Sponsors must also include the results in the grant application.
4. Are sponsored by one Rotary club or district in the country where the grant project will take place (the

primary host sponsor) and one outside that country (the primary international sponsor). We may make exceptions for projects in countries where Rotary doesn't have clubs but where Rotary International's Board is actively pursuing extension.

5. Are [sustainable](#). Communities where a project is carried out must be able to address their own needs after the Rotary club or district has completed its work.
6. Are measurable. Sponsors select standard measures from the [Global Grant Monitoring and Evaluation Plan Supplement](#), and may add their own measurements.
7. May be used to build infrastructure, such as toilet blocks and sanitation systems; access roads; dams; bridges; storage units; fences and security systems; water or irrigation systems; and greenhouses. If your project will access groundwater, you need to have done a hydrogeological survey. The cost of that can be included in the grant budget.
8. Support international travel for up to two people as part of a humanitarian project. These people provide training or implement the project if the local Rotary club confirms that those skills aren't readily available locally.

### **III. RESTRICTIONS**

Grants cannot be used to unfairly discriminate against any group, promote a particular political or religious viewpoint, support purely religious functions, support activities that involve abortion or that are undertaken solely for sex determination, fund the purchase of weapons or ammunition, or serve as a new contribution to the Foundation or to another Foundation grant.

Grants also cannot fund:

1. Continuous or excessive support of any one beneficiary, entity, or community
2. The establishment of a foundation, permanent trust, or long-term interest-bearing account. Grant funds can be used to establish a microcredit fund if the sponsors comply with the requirements detailed in section XI.
3. The purchase of land or buildings
4. Fundraising activities
5. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, entertainment activities, or project ceremonies
6. Public relations initiatives, unless they are essential to carrying out the project
7. Project signs that cost more than \$1,000
8. The operating, administrative, or indirect program expenses of another organization, with the exception of expenses allowed within the project management allocation for global grants
9. Unrestricted cash donations to a beneficiary or cooperating organization
10. Activities for which the cost has already been incurred
11. Transportation of vaccines over national borders without prior approval of appropriate government and

regulatory authorities in the originating and recipient countries

12. Travel to National Immunization Days
13. Immunizations that consist solely of the polio vaccine
14. The purchase of COVID-19 vaccines
15. Study at a university that hosts a Rotary Peace Center in the same or similar academic program as Rotary Peace Fellows
16. Projects that require a person to work without pay. Projects should instead strive to reinforce labor rights and fair wage practices. If beneficiaries are required to provide sweat equity their explicit consent is required.
17. Projects that require work from someone below the country's legal working age, or under age 16 if the law doesn't specify.

### **Global grants**

In addition to the restrictions listed above, global grants cannot fund:

1. [Rotary Youth Exchange](#), [RYLA](#), [Rotary Friendship Exchange](#), [Rotaract](#), [Interact](#), or [New Generations Service Exchange](#) programs
2. International travel for people under age 18, unless they are accompanied by a parent or guardian
3. New construction of any permanent structure in which people live, work, or spend a significant amount of time, such as hospitals or container and mobile homes, or of structures in which people carry out activities such as manufacturing and processing. If the grant depends on the construction of a building, that construction must be paid for with non-grant funds.
4. Renovations to complete buildings that are partially constructed (including those with only the exterior completed) but that have never been occupied or operational
5. Travel for staff of a cooperating organization involved in a humanitarian project
6. Activities primarily carried out by an organization other than Rotary
7. Humanitarian projects that are primarily research-oriented or focused on data collection
8. Humanitarian projects that consist solely of individual travel expenses
9. Undergraduate studies, such as for a bachelor's degree
10. Multiple unrelated projects under one grant

## **IV. HOW TO APPLY**

Apply for grants online in the [Grant Center](#).

To receive a grant from The Rotary Foundation, all the primary sponsor districts involved need to be [qualified](#) by the Foundation. For global grants, all the primary sponsor clubs involved need to be qualified by their district. Districts, clubs, and all grant committee members also need to be in good standing with Rotary International and

The Rotary Foundation, and the name of the project receiving the grant needs to be in compliance with the Rotary International policies for use of the Rotary logos, emblems, and graphics (see section II). People who may not serve on a grant committee include Rotary International fiscal agents, national treasurers, and board members and paid staff of a cooperating or beneficiary organization associated with the grant. As a primary sponsor, each district and each club is limited to 10 open grants at a time.

### **District grants**

Your district needs to establish a grant committee of three Rotarians: the district governor of the implementation year, the district Rotary Foundation committee chair, and the district grants subcommittee chair. These committee members are responsible for authorizing and submitting the district grant application.

Districts may submit one application per Rotary year, and it needs to include a spending plan. Any requests for an increase in the grant amount need to be made before the Foundation has paid any portion of the grant. All district grant applications must be submitted by 15 May of the Rotary year for which the funds are requested.

In a district grant application:

1. Your district may allocate up to 20 percent of its district grant funds for contingencies that may arise during the year, but all projects and activities you add to the grant after it has been approved need to then be approved by the Foundation before you can spend the money. Note this contingency fund on the spending plan and itemize contingency items when you submit your final report.
2. You may allocate up to 3 percent of the grant award for grant-related administrative expenses, such as bank fees, postage, software, and an independent financial assessment.

### **Global grants**

Primary host and international sponsors need to each establish a grant committee of three Rotarians for a global grant. Members of this grant committee need to come from the primary sponsor club (if the grant is club-sponsored) or district (if the grant is district-sponsored). For club-sponsored grant applications, district Rotary Foundation committee chairs need to confirm that the primary sponsor clubs are qualified. Applications are accepted on a rolling basis throughout the Rotary year and approved throughout the year, based on the availability of funds.

In a global grant application:

1. Sponsors may include a budget line item for contingencies representing no more than 10 percent of the total budget, in order to offer protection from price increases or currency fluctuations. Sponsors need to report on the use of these funds or return them to the Foundation if they aren't used.
2. Sponsors may allocate up to 10 percent of the project budget for project management costs, which may include a project manager and project-specific overhead and administrative costs for cooperating organizations.
3. Sponsors may include up to 10 percent of the project budget to cover expenses to measure project

outcomes.

Scholars and vocational training team members need to submit individual applications to supplement the overall grant application. Grant sponsors should ensure that scholar and vocational training team applicants understand that the Foundation needs to approve their applications before they incur any expenses or make travel arrangements. Applications involving travel for scholars, vocational training teams and volunteer travelers need to be submitted 90 days before the travel dates.

Note that:

1. If grant applications aren't formally submitted within 12 months of initiation, the application will be canceled.
2. If grant applications aren't completed and approved within six months of submission, the application will be canceled.
3. If payment requirements aren't met within six months of approval, the grant will be canceled.
4. If grants aren't implemented within 12 months of payment, the grant will be canceled, and the sponsors will be required to return the funds.

Additional criteria for scholarships:

1. Applicants need to provide proof of university admission to a graduate-level program or letter of invitation to conduct postgraduate-level research when applying for the grant. Admission that requires a guarantee of financial support is acceptable.
2. Applicants need to study outside their home country.
3. Applications for scholars who will begin studies in August, September, or October need to be submitted by 30 June.
4. The scholar's study period may begin at any semester during the course of their studies, but funding can be for no less than one academic year.

Additional criteria for vocational training teams:

1. Teams need to be composed of at least three members, including a Rotarian team leader and at least two other members. The team members must have at least two years of work experience each in the area of focus. The Rotarian team leader needs to have a general level of Rotary knowledge, international experience, leadership skills, and some expertise within the area of focus. Non-Rotarians may serve as team leaders if the sponsors establish a need for this in the grant application.
2. Rotarians and their family members may participate in a vocational training team as long as the team is providing training, not receiving training.
3. Relatives of a vocational training team member may participate on the same team if they meet eligibility requirements.



4. If more than one team is traveling under a single grant, the teams must share the same two primary sponsors and begin travel within one year of each other.
5. All team members need to be approved by the Foundation before travel. Any changes to the team's composition need to be reported to and approved by the Foundation.

Global grant applications will have these kinds of assessments:

1. Requests for a World Fund amount up to \$50,000, known as Level 1 applications, will be reviewed by the general secretary and analyzed by an expert in the area of focus if necessary.
2. Requests for a World Fund amount of \$50,001-\$200,000, or total funding of \$100,001-\$400,000 involving directed gifts or endowment earnings, known as Level 2 applications, will be reviewed by the general secretary, analyzed by an expert in the area of focus, and have an interim site visit from The Rotary Foundation Cadre of Technical Advisers.
3. Requests for a World Fund amount of \$200,001-\$400,000, or total funding of \$400,001 or more involving directed gifts or endowment earnings, known as Level 3 applications, will be reviewed by the general secretary, analyzed by an expert in the area of focus, have an advance site visit from the Cadre, and have an audit and/or an interim site visit by the Cadre. These applications are also reviewed by the Trustees. The Trustees will review global grant applications received by:
  - a. 1 June in September/October
  - b. 1 October in January
  - c. 1 December in April
  - d. 1 March in June

An area of focus expert, working with the Cadre chair, may decide that a grant needs a different level of assessment, and can waive or add requirements. Grants that consist exclusively of a vocational training team or scholarship are exempt from Cadre review requirements.

## **V. TRAVEL POLICIES**

Anyone traveling for a grant should make their own [travel arrangements](#). They can work with [Rotary International Travel Service \(RITS\)](#) or organize travel on their own.

Rotary Foundation grants will cover these budgeted expenses related to international travel:

1. Economy-class ticket(s)
2. Transportation to and from airports and local travel related to implementing the grant
3. The cost of inoculations or immunizations, visas, and entry and exit taxes
4. Normal and reasonable luggage charges
5. Travel insurance

Rotary Foundation grants will not cover:

1. Expenses associated with optional stopovers before or after travel that has been approved
2. Penalties resulting from changes in personal travel arrangements, including optional stopovers
3. Charges for excess baggage and shipping

The club or district sponsoring the grant should maintain emergency contact information and travel itineraries for anyone traveling on grant funds. You should share this information with the Foundation when asked to do so.

Grant recipients are responsible for:

1. Making travel arrangements. Failure to arrange travel promptly may increase the cost of it or lead to the grant being canceled.
2. Any expenses that exceed the approved travel budget, unless approved by the Foundation
3. Meeting all medical requirements for international travel
4. Arranging and funding any personal travel, which may take place for up to four weeks at the end of the grant activities. After that, grant recipients are expected to return home.
5. Abiding by Rotary International travel restrictions for a particular country
6. Obtaining travel insurance

Each health care professional who will provide services as part of the grant activities is expected to have at least \$500,000 in professional liability insurance coverage (known as errors and omissions liability). This refers to coverage for legal liability that could arise from that person's professional acts or omissions that cause harm to others. The participant should obtain and pay for this coverage.

Rotary International works with a global security advisory firm to maintain a [travel ban list](#) of extremely dangerous countries. The Foundation does not fund travel to these countries because of safety concerns. If a country is added to the list while funded travelers are in that country, plans will be made for their immediate evacuation. Should the person not defer travel to or evacuate from a country as instructed, the Foundation will cancel the grant and request the return of any funds already issued. The Foundation cannot fund any grant whose success relies on international travel to a country on the list, even if the cost of travel is not part of the project budget.

Non-Rotarians who receive grant funding for scholarships, participation in vocational training teams, or travel to implement a humanitarian project are expected to:

1. Demonstrate knowledge of Rotary
2. Participate in an orientation session before their departure (either [online](#) or in person)

3. Take part in club and district activities as requested by their sponsors, such as speaking at club or district meetings and participating in service projects
4. Be proficient in the language of the host country

## **VI. HOW GRANTS ARE FUNDED**

### **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 50 percent of its [SHARE allocation](#), which represents 50 percent of its annual giving from the previous three years plus any Endowment-SHARE earnings.

### **Global grants**

Global grants have a minimum budget of \$30,000 and a 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 Foundation. Both Rotarian and non-Rotarian cash contributions must include an additional contribution of 5% to offset processing and administrative expenses. Funds should never be collected from beneficiaries in exchange for receiving the grant. At least 15 percent of contributions to global grants that fund humanitarian projects need to come from outside the project country. Host sponsors for humanitarian projects are encouraged to contribute toward the financing of the grant. Cash contributions to the Annual Fund may not be moved to a global grant.

Grant financing cannot be changed after it is approved. Paul Harris Fellow recognition credit will be given only for sponsor contributions sent to The Rotary Foundation, not for contributions sent directly to the project. Sponsors shouldn't send contributions before a grant is approved. They'll be credited to the grant application, but if the application isn't approved, the contributions will be credited to the Annual Fund-SHARE and can't be reallocated after that. All global grant contributions are considered irrevocable contributions to The Rotary Foundation and will not be refunded.

Scholars who receive funding from sources other than their Rotary scholarship may use them, but the Foundation will not match other scholarship or personal funds. The Rotary Foundation is required to withhold tax from global grant scholarships awarded for study in the U.S. (except for scholars from Japan, Canada, and Germany, who are funded through associate foundations in those countries) on any expenses beyond tuition, books, necessary

equipment, and fees. The amount withheld will be deducted from the scholarship payment.

## **VII. COOPERATING ORGANIZATIONS**

Cooperating organizations are reputable non-Rotary organizations or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the grant. Cooperating organizations need to comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts and proof of purchases as required. Universities hosting scholars are not considered cooperating organizations.

### **District grants**

All funding provided to cooperating organizations needs to be used for specific project expenses. The sponsor district needs to maintain an itemized report of these expenses.

### **Global grants**

With a grant application, sponsors need to provide a [memorandum of understanding \(MOU\)](#) signed by both primary sponsors and the cooperating organization. It should include:

1. Verification from both primary sponsors that the grant is initiated, controlled, and managed by Rotary clubs or districts
2. An endorsement from the primary sponsors affirming that the cooperating organization is reputable, responsible, and acting within all governing laws
3. A grant implementation plan clearly listing the activities of each party
4. An agreement from the cooperating organization to participate in any financial review by the Foundation of activities connected with the grant

## **VIII. PAYMENTS**

### **District grants**

Grant funds will be paid only to the district or district foundation bank account that you listed in your application. District grant funds will not be released until the district grant from the previous Rotary year is closed. District grants are paid out at the Rotary International exchange rate at the time of payment. Funds are not available after the close of the implementation year, meaning that if sponsors don't meet all payment requirements by 31 May of the implementation year, the grant will be canceled.

### **Global grants**

Grant funds won't be released until the grant sponsors have entered their bank account information in the [Grant Center](#), sponsor contributions have been submitted to The Rotary Foundation, and any payment contingencies have been met. Grant funds will be sent to the account listed in the [Grant Center](#). Project funds may not be paid to a vendor, cooperating organization, or beneficiary organization before project expenses have been incurred or services have been delivered. Organizations being reimbursed for project expenses need to give the Rotarian project sponsors copies of the original invoice or receipt before they'll be paid. The people with signing authority

on the bank account need to be members of the sponsoring club or district. Grants will be paid out at the Rotary International exchange rate at the time of payment.

Grants for which the World Fund award is \$50,001-\$400,000, or total funding is \$100,001 or more involving directed gifts or endowment earnings (Level 2 and 3 applications), will be paid in installments according to a spending plan. Payments after the first installment will be made after the grant sponsors submit a satisfactory progress report and a Cadre representative conducts an interim site visit.

The following points apply to global grants funded with cash contributions:

1. All grant-related transactions will be recorded using the current published monthly Rotary International exchange rate, and all grant-related transactions will be officially communicated in U.S. dollars.
2. For the part of the grant funded by cash contributions, sponsors will be shielded from currency exchange fluctuations of more than 10 percent of the rate at the time it was approved. The Foundation also will not distribute currency gains to project sponsors of more than 10 percent of the rate at the time it was approved.
3. All cash contributions to global grants sent to the Foundation need to include an extra 5 percent to offset processing and administrative costs. Paul Harris Fellow recognition points will be awarded on the full cash contribution, and charitable tax receipts will reflect that amount. The additional 5 percent is not required for contributions sent directly to a project's bank account. Those contributions don't generate Paul Harris Fellow recognition points, however, and the Foundation won't issue tax receipts for them.
4. All contributions submitted to the Foundation above the amount pledged to the grant, or sent to a grant after the grant has been paid, will be moved to the World Fund.

## **IX. REPORTING REQUIREMENTS AND DOCUMENTATION**

Grant recipients need to report to the Foundation how grant funds are used. Submit progress and final reports in the [Grant Center](#). All forms need to be entirely complete to be accepted. The Foundation won't approve new grant applications if a grant sponsor has an overdue report for any Foundation grant. (\*See exception below.) The Foundation may at any time review grants, conduct an audit, send a monitor, require additional documentation, and suspend any or all payments.

These provisions also apply to grant recipients:

1. Districts need to report the use of grant funds to their member clubs according to the terms of their qualification.
2. Grant sponsors need to keep copies of all receipts and bank statements related to grant-funded spending, according to the terms of their qualification and applicable laws.
3. Grant sponsors who don't adhere to Foundation policies and guidelines in implementing and financing grant projects will need to return all grant funds and may be barred from receiving other grants for up to five years.



## District grants

These additional conditions apply to district grants:

1. Final reports that document the disbursement of 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.
2. All grant projects and activities funded by district grants need to be completed within 24 months of the Foundation or the local district transferring funds to the club or project site.
3. If more than \$1,000 of grant funds remain after the projects are completed, the Foundation needs to approve their use for additional project-related expenses. If you cannot spend these funds as approved, you must return them to The Rotary Foundation, and they will be credited to the district's DDF.
4. If \$1,000 or less of grant funds remain after the projects are completed, funds may be used for activities that meet the district grant eligibility requirements and do not require pre-approval from the Foundation. Remaining grant funds in any amount may not be spent on expenses that are not related to the district grant.
5. Grant funds of \$1,000 or less that are returned to the Foundation will be moved to the World Fund.
6. The following countries have these requirements for returning funds:
  - a. Argentina: Any unused grant funds of more than ARS 10 must be returned.
  - b. Brazil: Any unused grant funds of more than BRL 100 must be returned.
  - c. India: Any unused grant funds of more than INR 10,000 must be returned.

## Global grants

These additional conditions apply to global grants:

1. You 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.
2. Final reports need to be submitted within two months of completing the project.
3. If more than \$1,000 of grant funds remain after a project is completed, the Foundation needs to approve their use for additional project-related expenses. If you cannot spend these funds as approved, you must return them to The Rotary Foundation. The funds will be moved as follows:
  - a. If the full grant amount is returned, World Fund, DDF, endowed fund spendable earnings, directed gifts, and Corporate Social Responsibility funds will be returned to their original source. Cash and TRF-Donor Advised Fund contributions will be moved to Annual Fund-SHARE. Non-Rotary cash contributions will be moved to the World Fund.
  - b. If a partial grant amount is returned, all funds will be moved to the World Fund.
4. If \$1,000 or less of grant funds remain after the grant activities are completed, funds may be used for activities that meet the global grant eligibility requirements and do not require pre-approval from the Foundation. Remaining grant funds in any amount may not be spent on expenses that are not related to the global grant.
5. Grant funds of \$1,000 or less that are returned to the Foundation will be moved to the World Fund.

6. The following countries have requirements for returning funds:
  - a. Argentina: Any unused grant funds of more than ARS 10 must be returned.
  - b. Brazil: Any unused grant funds of more than BRL 100 must be returned.
  - c. India: Any unused grant funds of more than INR 10,000 must be returned.

\*Both the host and international sponsor are required to complete, authorize, and submit global grant reports. However, international sponsors of humanitarian global grants won't be restricted from receiving new grants if a report is overdue and the international sponsors did not receive the funds.

Acceptable reports contain detailed accounts of the project's implementation. You should include:

1. A description of how the project has advanced the goals of the selected area(s) of focus
2. An account of how the project achieved the specific objectives outlined in the grant application, including the measures you set and what data you collected
3. An explanation of how the project's results will be sustained over time
4. A description of how the host and international partners, as well as any cooperating organizations associated with the grant, participated in the project
5. A detailed account of project spending and complete project account bank statements. The Foundation may also ask that sponsors submit receipts. Scholars and vocational training teams need to provide receipts to their sponsors for expenses of more than \$75.

The Foundation will close the grant once the project implementation is complete and sponsors have shown that sustainability measures are in place to ensure that local community members will keep the project going.

## **X. CANCELED GRANTS**

### **District grants**

If a district grant is canceled, the following procedures apply:

1. If a grant has been approved but not paid, all funds will be returned to the district's DDF balance.
2. If a grant has been paid, all unused grant funds must be returned to the Foundation and will be credited to the district's DDF balance.

### **Global grants**

If a global grant is canceled, the following procedures apply:

1. If a grant has not yet been approved, cash and TRF-Donor Advised Fund contributions received for the grant will be moved to the Annual Fund-SHARE. Non-Rotary cash contributions will be moved to the

World Fund.

2. If a grant has been approved but not paid, World Fund, DDF, endowed fund spendable earnings, directed gifts, and Corporate Social Responsibility funds will be returned to their original source. Cash and TRF-Donor Advised Fund contributions will be moved to Annual Fund-SHARE. Non-Rotary cash contributions will be moved to the World Fund.
3. If a grant has been fully paid but all funds are returned, World Fund, DDF, endowed fund spendable earnings, directed gifts, and Corporate Social Responsibility funds will be returned to their original source. Cash and TRF-Donor Advised Fund contributions will be moved to the Annual Fund-SHARE. Non-Rotary cash contributions will be moved to the World Fund.
4. If a grant has been fully paid but a partial amount is returned, all of those funds will be moved to the World Fund.

## **XI. MICROCREDIT**

The Rotary Foundation is committed to using microcredit programs to facilitate small, self-help enterprises. Clubs and districts that are applying for global grants need to work with registered microfinance institutions that have been operating for at least three years in order to administer loan programs as a way to carry out sustainable development projects. But microcredit programs funded by the Foundation need to incorporate a component, such as training, that extends beyond the management of loan capital. In addition:

1. Clubs and districts that want to use global grant funds to support a microcredit project need to submit a [Global Grant Application Supplement for Microcredit Projects](#) with their grant applications.
2. Microcredit activities need to be supervised and controlled by the sponsoring club or district.
3. Grant funds need to be tracked separately in the accounting system of the microfinance institution.
4. Interest and fees generated by microcredit fund capital from The Rotary Foundation may be used for administrative expenses that directly support the project.
5. Grant sponsors need to submit a [Global Grant Report Supplement for Microcredit Projects](#) with the final grant report.
6. If a microcredit project ends before meeting our reporting requirements, sponsors need to return grant funds to the Foundation.
7. The Rotary Foundation will not fund loan guaranty systems.

## **XII. SPECIAL CONSIDERATIONS FOR INDIA**

In addition to all other terms and conditions, grants with full or partial payment to a Rotary club or district in India must follow the payment and reporting procedures below to comply with Government of India laws and the Foreign Contribution Regulation Act (FCRA) read with Foreign Contribution Regulation Amendment Act 2020. For general information about the FCRA, go to <https://fcraonline.nic.in/home/index.aspx>. A FCRA-registered club or district is responsible for furnishing FC-4 return along with the financial statements to the Ministry of Home Affairs, New Delhi, in a timely manner.

## **Grant payments**

All grant payments will be remitted to bank accounts especially opened to receive INR funds or to a club-controlled FCRA account. Grant funds will not be released to a bank account in India unless all general payment conditions listed below have been met. Either the staff need to determine that enough funds are available from contributions made within India or the sponsors need to provide documentation showing that the bank account is registered under the FCRA. Otherwise, the payment will be placed in a queue and paid on a first-come, first-served basis only when more contributions (within India) are made and enough funds are available. Grant sponsors need to ensure that funds received in a FCRA-registered bank account are not commingled with local funds.

### **District grants**

Payment is contingent upon the approval of a detailed spending plan that includes an itemized budget for each listed project or activity. Grant funds will be paid only to the district bank account, which needs a name that identifies both the district and the project (for example, Rotary District 0000 District Grant 12345). District grant funds will not be released until the previous Rotary year's district grant is closed. Funds are not available after the close of the implementation year. If sponsors don't meet all payment requirements by 31 May of the implementation year, the grant will be canceled.

### **Global grants**

Funds won't be released until all sponsor contributions have been submitted to The Rotary Foundation and any payment contingencies have been met. Grant funds will be paid to the account provided by the grant sponsors.

## **Grant reporting**

Progress reports on grant funds paid out from Rotary Foundation (India) or from Rotary International South Asia Office through 31 March are due by 31 May of that same year. Final reports are due two months after the grant's completion. All progress reports need to meet all general reporting requirements as listed in section IX. In addition, the grant sponsors need to:

1. Submit a progress report electronically in the [Grant Center](#)
2. Inform the South Asia office that the progress report has been filed electronically in the [Grant Center](#)
3. Submit an original hard copy of the utilization certificate if grant funds have been used, along with a statement of receipt and payment for the grant amount, certified by an independent chartered accountant (including that person's membership number); the utilization certificate must name the entity – Rotary Foundation (India) or Rotary International South Asia Office – that paid out the grant funds
4. Submit an original bank statement or pass book (or a photocopy certified by the bank manager or a chartered accountant)
5. Upload all the bills, invoices, and receipts in the [Grant Center](#)

If the grant funds were not used for any reason, include an original bank statement or bank passbook (or a photocopy certified by the bank manager or a chartered accountant) indicating the date on which the grant amount was credited and a statement explaining why the grant amount has not yet been used, even if the grant

amount was received before March.

All final reports need to meet all general reporting requirements as listed in section IX. In addition, the grant sponsors need to:

1. Submit a final report electronically in the [Grant Center](#)
2. Inform the South Asia office that the final report has been filed electronically in the [Grant Center](#)
3. Submit an original hard copy of the utilization certificate if grant funds have been used, along with a statement of receipt and payment for the grant amount, certified by an independent chartered accountant (including that person's membership number); the utilization certificate must name the entity – Rotary Foundation (India) or Rotary International South Asia Office – that paid out the grant funds
4. Submit an original bank statement or bank passbook (or a photocopy certified by the bank manager or a chartered accountant)
5. Submit a bank reconciliation statement, if multiple grants were paid to a single INR or FCRA account
6. Upload all the bills, invoices, and receipts in the [Grant Center](#)
7. Upload the undertaking in the [Grant Center](#) that “all originals will be kept for a period of eight years and will be produced as and when required by Rotary Foundation (India) or Rotary International South Asia Office”
8. Return any unused grant funds of more than INR 10,000 to the entity that paid out the grant funds, Rotary Foundation (India) or Rotary International South Asia Office
9. Retain beneficiary information, including photographs, newspaper clippings, or letters or appreciation from the beneficiaries or beneficiary organization, since it may be requested by Rotary Foundation (India) or Rotary International South Asia Office

### **XIII. SPECIAL CONSIDERATIONS FOR THE PHILIPPINES**

In addition to all the other terms and conditions, grants paid to a Rotary district in the Philippines require more documentation to comply with Philippine law. The Securities and Exchange Commission of the Philippines requires foundations to include supporting documents for all projects for which they have provided funding when they file financial statements. More information can be found in Securities Regulation Code 68, as amended. So that the Foundation can comply, grant sponsors need to get certification from any of these people or organizations in the area where they have jurisdiction:

1. Office of the Mayor, stamped with an office seal
2. Head of the Department of Social Welfare and Development, stamped with an office seal
3. Head of the Department of Health, stamped with an office seal
4. Office of the Barangay Chairman, stamped with an office seal
5. Head or an officer of private institution or actual beneficiaries, notarized



Please send five original certificates on each project to:

Phil. Consulting Center, Inc.

c/o Erika Mae Bautista

2D Penthouse, Salamin Bldg.

197 Salcedo St., Legaspi Village

Makati City 1229

Philippines

You can get sample templates of the certification from the Rotary International South Pacific and Philippines office. Certifications of projects that were paid for from July to May should be received by 30 June of the same fiscal year, while those paid in June should be received by 31 July.

#### **XIV. CONFLICT OF INTEREST POLICY FOR PROGRAM PARTICIPANTS**

Ensuring integrity in The Rotary Foundation grants program requires that all people involved in a program grant or award conduct themselves in a way that avoids any conflicts of interest. A conflict of interest occurs when someone is in a position to make or influence a decision about a grant or award that could benefit them, an immediate family member, a business partner, or an entity in which they, an immediate family member, or a business partner has a significant financial interest or in which any of them is a trustee, director, or officer.

All actual or potential conflicts of interest need to be disclosed to the general secretary. If you're not sure if there's a potential conflict, you should disclose it. No Rotarians can serve on a grant committee for any global grant for which they have a conflict of interest. Global grants may not be financed with contributions (directed gifts, Corporate Social Responsibility funds, etc.) from donors who have conflicts of interest regarding the grant.

The general secretary will advise grant applicants on how to interpret and implement this policy. The general secretary and/or the Trustees will determine whether a conflict of interest exists in a particular case. If they conclude that there is or has been a conflict of interest in a grant or award, the general secretary will recommend to the Trustees an appropriate remedy to protect the integrity of the grant process. That remedy may be canceling current funding or suspending future funding involving a particular Rotarian, club, or district.

##### **Award recipient eligibility**

Some people are not eligible to be candidates or final award recipients or beneficiaries of any Foundation program. As listed in section 9.3 of the Foundation bylaws, they include:

1. Current Rotarians
2. Employees of clubs, districts, other Rotary entities (as defined in section 1.040. of the Rotary [Code of Policies](#)) and of Rotary International
3. The spouses; children or grandchildren by blood, legal adoption, or marriage without adoption; the

spouses of those children or grandchildren, or parents or grandparents by blood of people listed above; and employees of agencies, organizations, or institutions that work with Rotary International or the Foundation

Former Rotarians will be ineligible for three years after the end of their membership. People who were ineligible based on their family relationship with a former Rotarian will also be ineligible for three years after the end of their relative's membership. These people will be eligible, however, to participate in vocational training teams and in individual travel for humanitarian projects (if they are determined to be qualified to do so) funded by district grants and global grants as long as they provide a benefit to others.

#### **Impartiality of selection committees**

Rotarians who serve on a club- or district-level selection committee for a Foundation program need to be completely transparent about their personal, family, or business relationship with an applicant and must, before a selection process, notify the committee chair of any actual or perceived conflict of interest (for example, working at the same business or organization, being members of the same Rotary club or a member of the club sponsoring an application, or having a family relationship with a candidate).

The selection committee chair will decide if and how that committee member should participate in the selection process. If the selection committee chair has an actual or perceived conflict of interest, the club board or the district Rotary Foundation chair will decide if and how that person should participate in the selection process.

#### **Business transactions with vendors**

Before the Foundation, a Rotary district, a Rotary club, or a Rotarian conducts business related to a Foundation program award that involves a vendor being paid by a Rotary entity, a fair, open, and thorough request for proposals or bidding process must be conducted to ensure that the best services are secured at a reasonable cost. Possible conflicts of interest may arise when a Rotary entity is considering business in which funds will be paid to a Rotarian, a provider of goods or services owned or managed by a Rotarian, honorary Rotarian, and the people listed above who are ineligible for Foundation awards.

Business relationships that may need further review to confirm that there's no conflict of interest include transactions with a partner nongovernmental organization, provider of goods or services, insurance company, travel agency, shipping agency, study institution, or a language skills testing firm. These kinds of business transactions can be completed with the general secretary's approval if they provide the best product or service at fair market cost, as evidenced by a sales quote or offer obtained through a fair, open, and thorough process.

The general secretary will provide advice on how to interpret and implement this policy. Any Rotarian or Rotary entity with an unresolved conflict of interest involving a program grant or award must report it to the general secretary at least 30 days before the selection process or proposed transaction. The general secretary will decide if a conflict of interest might exist in a particular case. If the general secretary then decides there is or has been a conflict of interest in a grant or award, he or she will determine an appropriate remedy that may include canceling

current funding or suspending future funding that involves a particular Rotarian, club, or district.