



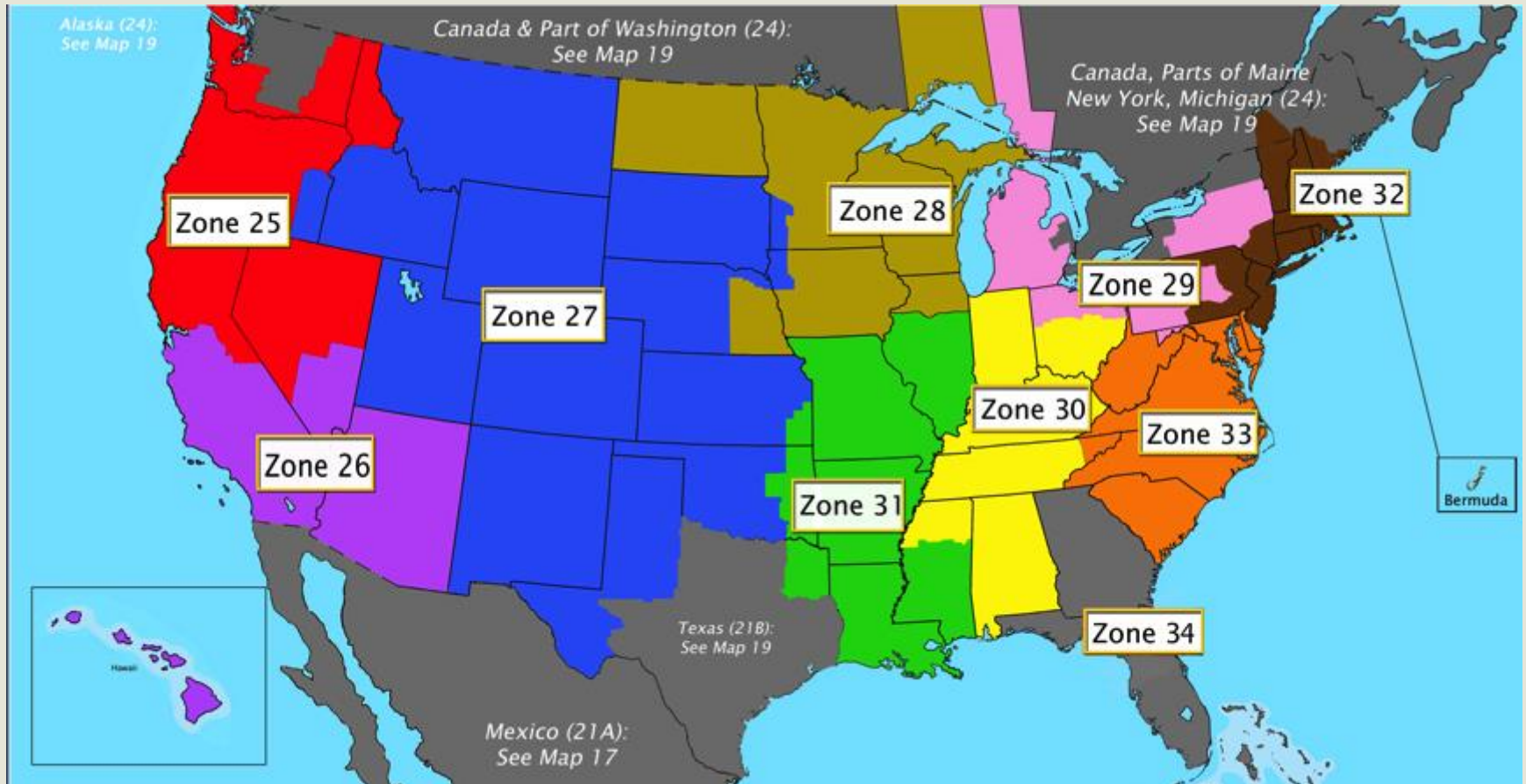
The Rotary Foundation Then & Now

Through generous individual contributions, Rotary funds sustainable projects that help address the world's greatest needs.

Greetings from Rotary!



34 Zones Around the World



Who was Paul Harris?



The Birth Of Rotary



The first four Rotarians: (*from left*) Gustavus Loehr, Silvester Schiele, Hiram Shorey , and Paul P. Harris

23 February 1905: the first meeting at 711 Dearborn

The Birth of The Rotary Foundation



Arch C. Klumph

- Born: 1869
- Charter member of the RC of Cleveland in 1911
- 6th President of Rotary International.
- Involved in writing the constitution of Rotary.
- Rotary Districts, District Governor and District Conferences.
- Suggests Rotary start an endowment.

“doing good in the world” but a bit slowly...

- Arch Klumph proposed it in 1917, the RI Board approved it but didn't approve a mechanism to fund it.
- For 10 years Rotary leaders went along with it but with little action or enthusiasm.
- **In 1928**, name is changed to The Rotary Foundation



The 1916-17 Board of Directors. Top (left to right): F.W. Galbraith Jr., E. Leslie Pidgeon, Chesley R. Perry, Guy Gundaker. Bottom (left to right): Arch C. Klumph, Allen D. Albert.

Rotary Foundation Milestones



Past Rotary presidents at the 1930 International Convention in Chicago, Illinois, USA. Left to right: Unidentified man, Allen D. Albert (1915-16), Paul P. Harris (1910-12), Raymond Havens (1922-23) and Arch C. Klumph (1916-17), 1930.

- The Foundation's **first grant** was made in **1930 for \$500** and benefited the “**Crippled Children Societies**” – a precursor of Easter Seals.
- **In 1947 - unprecedented flood of contributions**, providing the basis for the first Foundation program known as: “**Fellowship for Advanced Study**”

Rotary Foundation Milestones

- **1957: Paul Harris Fellow designation** created
- **1978:** First Health, Hunger and Humanity Grants (3-H). First 3-H grant project immunized 6 million children against Polio in the Philippines
- **1982: Permanent Fund** is established
- **1985:** Foundation initiated **PolioPlus**
- **1999: Bequest Society** established for commitments of \$10,000 or more
- **2004: Arch C. Klumph Society** established.



Arch Klumph and three unidentified men, note "Rotarily yours, Kristiania Rotary Club, 1922."

Together we are Rotary...



Rotary International

501c-4 – Board of Directors

Revenue Sources:

Dues

Investment Income

Services & Other Activities

Expenses:

Related to Dues

Related to Services & Activities



The Rotary Foundation

501c-3 – Board of Trustees

Revenue Sources:

Contributions

Investment Income

Expenses:

Program Awards & Operations

Fund Development Administration

The Mission:

To enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

Peace & Conflict Resolution/Prevention: **\$2.5m**
Disease Prevention & Treatment: **\$14.2m**
Water & Sanitation: **\$11.2m**
Basic Education & Literacy: **\$6.8m**
Child & Maternal Health: **\$5.1m**
Economic & Community Development: **\$7.8m**



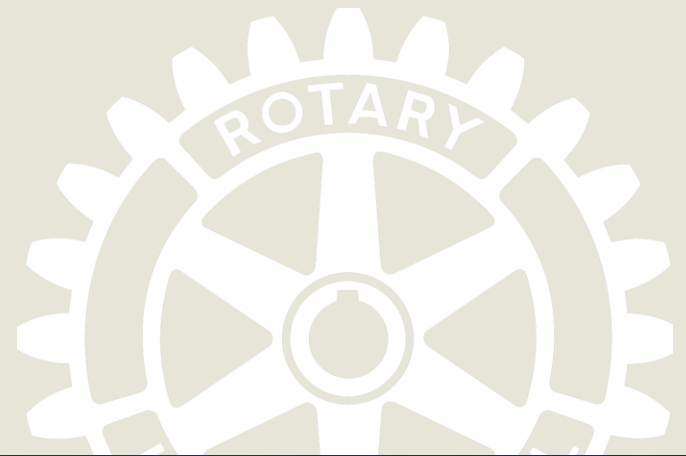
- **District Grants**

- District sets guidelines
- Local and/or International

- **Global Grants**

(min \$30,000)

- Humanitarian
- Scholarships
- Vocational Training Teams



Giving to Rotary

- **Annual Fund**

World Fund

SHARE --- local and International Projects

Area of Focus

- **Endowment Fund**

World Fund / SHARE

Area of Focus

Rotary Peace Centers

- **PolioPlus**

- **Term Gifts & Rotary Peace Centers**



Ways to make a gift

- Appreciated securities
- \$10,000 or greater Major gift pledge
- Cash
- Real estate or property
- Life income agreements
- IRA or other estate gifts
- Donor Advised Fund

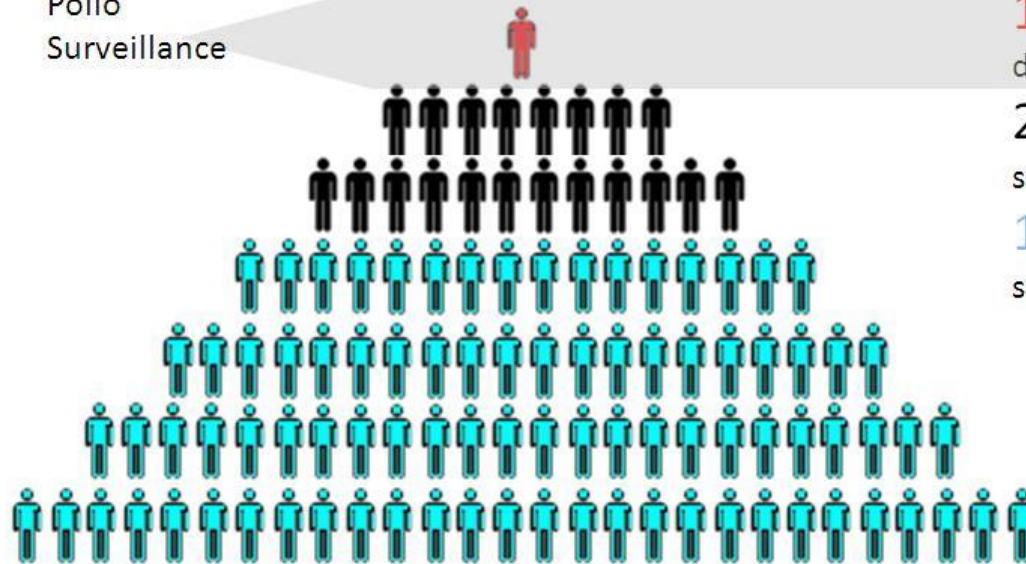
Contribution Summary

Fund	2012-13
PolioPlus Fund	\$98.2 million
Annual Fund	\$115.1 million
Endowment Fund	2012-2013 Value
Net Assets	\$284.4 million
Expectancies	\$530.6 million
Total	\$815.0 million

PolioPlus – Rotary's #1 priority



Polio
Surveillance



For every

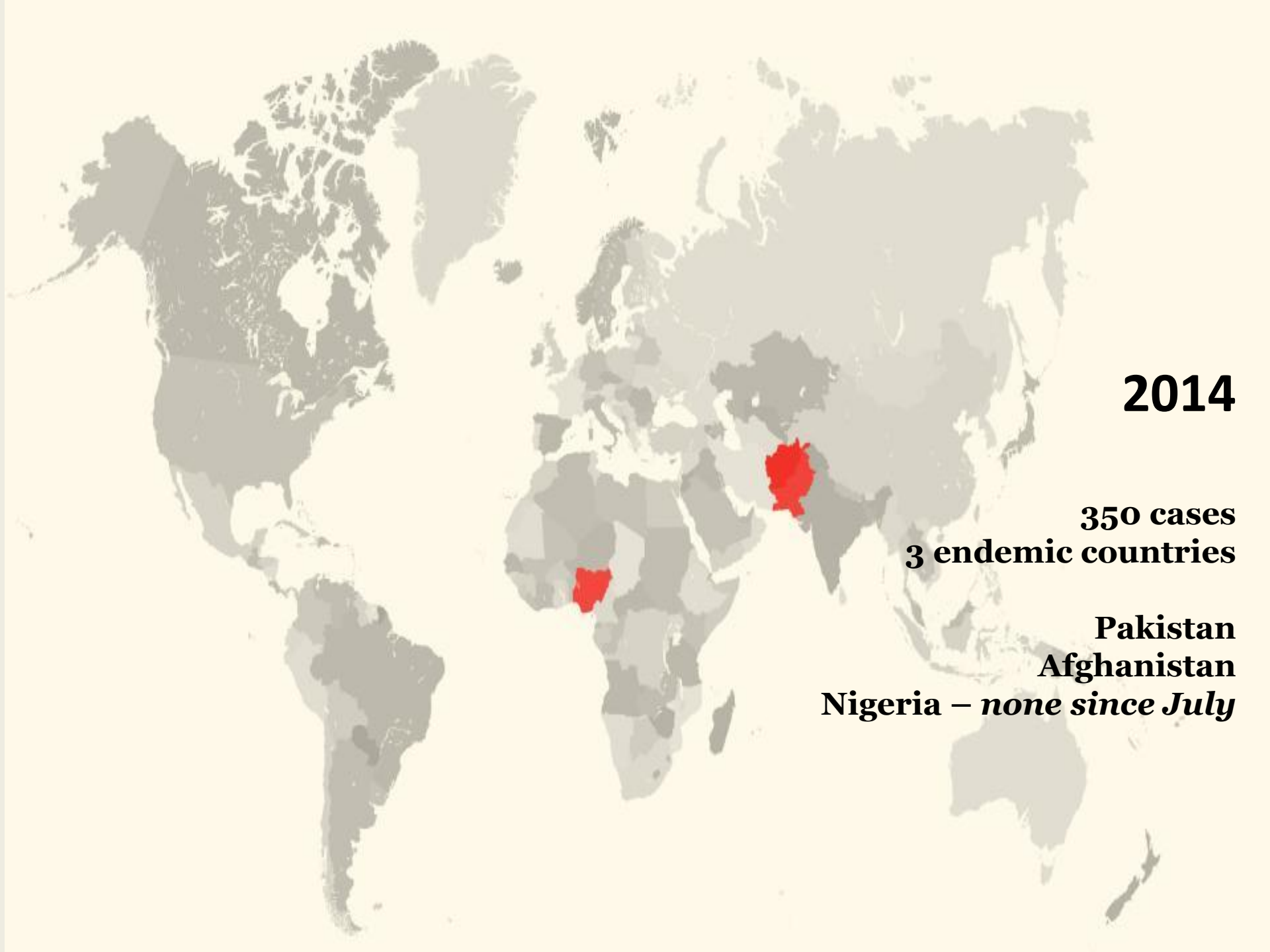
- 1** infected child who develops paralysis,
- 20** have non-specific symptoms
- 180** have no symptoms at all





1985

350,000 cases
125 countries



2014

350 cases
3 endemic countries

Pakistan
Afghanistan
Nigeria – *none since July*

Paul Harris Fellow & PH Society



- \$1,000 or more to the Annual Fund, PolioPlus or an approved Foundation grant.
- Can recognize others through points.
- PHS annual contribution of \$1,000 outright each year.

Major Donor



- Personal outright or cumulative gifts of US\$10,000 or more to the Foundation

Arch Klumph Society (AKS)

- AKS Trustees Circle
US\$250,000 to 499,999
- AKS Chair's Circle
US\$500,000 to 999,999
- AKS Foundation Circle
US\$1 million and above



Bequest Society



- Individual or couple who has made a provision in their final estate plan to give at least \$10,000 to The Rotary Foundation.

Why give to The Rotary Foundation?

- 100-years of history
- Highly rated by independent agencies
 - Charity Navigator ★★★★★
 - BBB
 - American Inst. of Philanthropy A+ charity
- You don't give *to* Rotary, you give *thru* Rotary
- Donor Directed Giving



“No one can tell us what Rotary will be tomorrow, but one thing is certain: what Rotary will be depends on what Rotarians do today.”

-Arch C. Klumph