



Presentation Manual Overview The Rotary Foundation of Rotary International



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2019-2022
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The Rotary Foundation of Rotary International

Table of Contents

- 0.1 The Rotary Foundation Manual Overview Cover Page
- 1.1 Table of Contents
- 2.1 Where to Find District Rotary Foundation Information
- 3.1 Sustaining a Giving & Grant Culture
- 4.1 Rotary History: Arch C. Klumph
- 5.1 What is The Rotary Foundation (TRF) of Rotary International (RI)
- 6.1 What is the Role of the District Rotary Foundation Chair (DRFC)
 - 6.1.1 Purpose of District Grants Committee Team
- 7.1 What is the Role of the Club Foundation Chair (CFC)
- 8.1 TRF, in a Class of their Own
- 9.1 TRF, Why We Need It?
 - 9.1.1 RI Six Focus Areas
- 10.1 TRF Foundation Funding Map
- 11.1 Community Grants Memorandum of Understanding (MOU)
- 12.1 DACdb Grants Module, Quick start to begin a Community Grant
- 13.1 Community Grants Awarded to Clubs
 - 13.1.1 Ledger 2019-2020
 - 13.1.2 Ledger 2020-2021
- 14.1 Global Grants Cover Sheet
 - 14.1.1 RI Global Grant Spending Policy (revised 2019)
 - 14.1.2 RI Global Grant Financial Transparency Policy
 - 14.1.3 RI Global Grant Application www.myrotary.org
 - 14.1.4 Available Global Grants Report www.myrotary.org
- 15.1 The Annual Fund is the Engine that Drives our District Giving
 - 15.1.1 Demonstrating the power of the Engine
 - 15.1.2 There Are Many Ways to Give to TRF
 - 15.1.3 Personal Thank You Letter From RI for Every Donation
 - 15.1.4 Individual Recognition by TRF
- 16.1 Understanding TRF Recognition Points
- 17.1 TRF Levels of Donor Recognition
- 18.1 District Foundation Recognition Dinners
 - 18.1.1 2019 Foundation Awards by Club
 - 18.1.2 2020 Foundation Awards by Club
- 19.1 Foundation Donor Forms Cover Sheet
 - 19.1.1 Rotary Direct Form
- 20.1 District Giving Reports
 - 20.1.1 District Fundraising Analysis

Finding Foundation Resources

rotarydistrict7620.org



RICH GLOVER, PDG
2019 2022
DISTRICT ROTARY FOUNDATION CHAIR
DISTRICT 7620

Welcome to.... ROTARY DISTRICT 7620—Central MD & Washington, DC



We are neighbors and community leaders uniting for the common good. With you, we can accomplish even more.

- Home
- District Links ▾
- COVID-19 Response ▾
- District Events ▾
- Foundation ▾
- Club Info ▾
- Rotary Intl Links ▾
- Speakers Bureau ▾
- Speakers



DISTRICT EVENTS

- District Foundation Directory
- District & Global Grants
- Global Grant Scholarships
- District Foundation Newsletters
- Training Resources for Foundation Chairs
- Donate to The Rotary Foundation

CONTACT INFO
Exec Sec Sonia Liu 11800 Old Georgetown Road Ste 1304 N. Bethesda, MD 20852-2648 sonia@rotary7620.org

Sustaining a Giving and Grant Culture "Why We Need It"

The word ***philanthropy*** is derived from the Greek meaning "love of humanity."
There is another word ***synergy***, from the Greek meaning "working together."

There is no other organization in the world that can match Rotarians actions of love of humanity and working together through amazing granting opportunities, leadership and governance of The Rotary Foundation (TRF).

District 7620 leaders and members have expressed in recent surveys a reduction in necessary knowledge of the TRF and interpretation of its "complexities and rules." Further, District 7620 membership contributions to the TRF by Every Rotarian Every Year (EREY) have fallen over the past several years.

We need to progress again from an underdeveloped giving culture by advancing membership knowledge of TRF. The objective is to inspire our members by sharing you experiences, wisdom, influence and personal value statement to those you know well, therefore inspiring them to take the next step of giving to the TRF. Our support to the TRF is the "Engine of Rotary" through the measurable, sustainable and impactful difference in millions of lives in our communities and around the world. We will pursue the goal of Every Rotarian Every Year (EREY) understands, believes and breathes the ***spirit of giving*** and the ***art of giving***.

District Rotary Foundation Chair (DRFC) Plan:

1. Reviewing the concept of "Giving & Grant Culture"
2. Discuss the "Art & Spirit of Giving "
3. What is The Rotary Foundation?
4. Why do we need It?
5. Ensure that Club leadership and Club Foundation chairs understand their role
6. Invite District "Subject Experts" to speak at club meetings
7. Lead Culture of Change through inspirational events and training
8. Listen and collaborate with other clubs for increased impact and successful outcomes

Training Opportunities ("Having the Conversation")

1. District Executive Leadership Team (DELT) meetings
2. Joint Leadership Team Meetings
3. DaCdb & My Rotary Grant Module Training
4. Memorandum of Understanding (MOU)
5. Pre-President-Elect Training (Pre-PETS)
6. Club Leadership Training (CLT)
7. Chesapeake PETS (C-PET)
8. Major Donor Receptions
9. Annual District Rotary Foundation Dinner

Video promoting 'giving'. <https://vimeo.com/344414914/711ce39aa6>

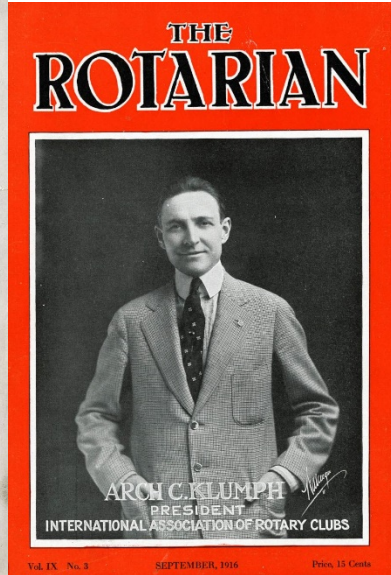
Rotary History

Arch C. Klumph: The Father of The Rotary Foundation

For a man best known as the father of **The Rotary Foundation**, Arch C. Klumph was modest about his role in its creation.



Arch C. Klumph, circa 1916



September 1916 issue of The Rotarian

In 1928, he listed three accomplishments that gave him “more satisfaction than any other contributions to Rotary” — and launching the Foundation wasn’t among them. Instead, he emphasized his role in writing Rotary’s Constitution in 1915, which he asserted “gave Rotary International its first centralized power and made all the Objects and fundamentals of Rotary universal.” He also took pride in establishing attendance reports and in being the first to insist on founding a European branch office of Rotary International.

Klumph was born in the small town of Conneautville, Pennsylvania, USA, on 6 June 1869. When he was a child, his family moved to Cleveland, Ohio, where he would become a founding member of the Rotary Club of Cleveland in 1911. As club president in 1913, he advocated for the club to build a reserve that would ensure its means to do future good work. This idea would stay with him as he moved on to serve Rotary in other roles

Klumph on the cover of the September 1916 issue of The Rotarian. In his message, he reminds members that “Rotary is bigger than any one man, than any board of directors.”

Five years after he became a Rotarian, Klumph was elected to serve as Rotary’s president for 1916-17. Near the end of his term, at the 1917 Rotary Convention in Atlanta, Georgia, USA, he reminded Rotarians that “Rotary is at the present time entering a new era, demanding improved methods in administrative machinery, with which to carry out the splendid principles

which have been laid down heretofore." He defined six points of action, including the establishment of an endowment, which would later become The Rotary Foundation:

"Carrying on, as we are, a miscellaneous community service, it seems eminently proper that we should accept **endowments** for the purpose of doing good in the world, in charitable, educational or other avenues of community progress, or such funds could be well used for extension work."

Through Klumph's simple yet profound statement, the Rotary Endowment Fund was born. In 1928, the name formally changed to The Rotary Foundation, and a Board of Trustees was established, with Klumph serving as the first trustee chair from 1928 to 1935. Even after stepping down as chair, he remained dedicated to educating Rotary leaders and members about the importance of the Foundation and encouraging contributions.

Klumph died on 3 June 1951 at age 82, but his influence lives on through The Foundation.



Rotary President Arch Klumph and 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.

What is The Rotary Foundation of Rotary International?



The **Mission** of The Rotary Foundation of Rotary International is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

Rotary's programs are developing the next generation of leaders, providing funding to make the world a better place, and making peace a priority. And our programs are not just for club members. Learn how you can make a difference in your community through Rotary.

When you give to The Rotary Foundation, you fuel our service projects - projects that eradicate polio, promote peace, and improve developing communities.

The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.

Since it was founded more than 100 years ago, the Foundation has spent more than \$4 billion on life-changing, sustainable projects.

With your help, we can make lives better in your community and around the world.

For the 12th consecutive year, The Rotary Foundation has received the highest rating — four stars — from Charity Navigator, an independent evaluator of charities in the U.S.

The Foundation earned the recognition for demonstrating both strong financial health and commitment to accountability and transparency. Only one percent of the organizations Charity Navigator evaluates have received 12 consecutive 4-star evaluations.

"Attaining a 4-star rating verifies that The Rotary Foundation exceeds industry standards and outperforms most charities in your area of work", says Michael Thatcher, president and chief executive officer of Charity Navigator. "This exceptional designation sets the Foundation apart from its peers and demonstrates to the public its trustworthiness."

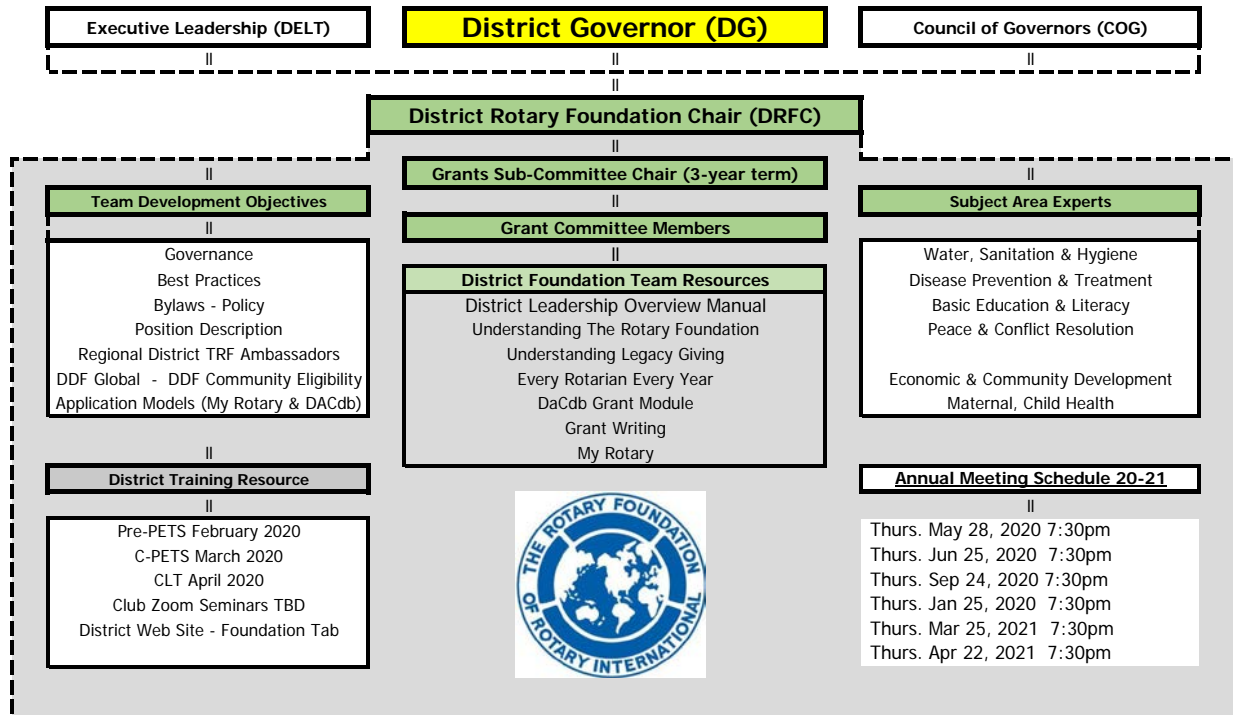
The rating reflects Charity Navigator's assessment of how the Foundation uses donations, sustains its programs and services, and practices good governance and openness.

D-7620 RI Rotary Foundation

Building a Giving & Grant Culture

Inspire the Spirit & Art of Giving

Work Groups & Implementation June 01, 2020



Notes:



Rotary International District Rotary Foundation Chair District 7620

ROLE:

To **assist** the District Governor (DG) to enhance knowledge with clubs in achieving goals and objectives of The Rotary Foundation (TRF).

To **serve** as the District Foundation liaison to the DG and Districts Leadership Team (DLT) and oversight of the Grants Sub-Committee (GSC) Team whom assists and trains Rotary Club members in the identification, prioritization, planning, implementation and evaluation of Global Grants and District Grants. As there are subject experts on the team, the DRFC may request GSC for assistance in programs such as World Community Service (WCS), PolioPlus, Major Donors, Benefactors, Bequest Society, Global Scholars and Paul Harris Giving.

To **enhance** the district's Giving and Grants Culture and to **inspire** the District's Spirit and Art of Giving.

To **approve** the Chair's grant recommendations by the GSC Team.

RESPONSIBILITIES:

The duties of the DRFC include, but not limited to:

- To **develop** a positionality statement and the culture of a GSC Team with selection of "subject experts" in order to enhance understanding and collaborative relationships of different priority perspectives and lens of the world.
- To **select** the Grants Sub-Committee Chair (Chair).
- To **facilitate** in collaboration with the Chair the selection and training of the GSC team of subject experts in Rotary International's "six areas of focus."
- To **assure** in collaboration with the Chair that all GSC team and committees develop measurable annual performance goals.
- To **conduct** at a minimum of quarterly status meetings with the GSC Team.
- To **maintain** Chair and GSC team knowledge and resources to evaluate all district grant projects as the GSC team offers assistance and facilitates district club guidance with project program logistics and problem solving in order to achieve impactful, measurable and sustainable district grants.
- To **celebrate** annual foundation donor achievements, for example an Annual Foundation Recognition Dinner, Million Dollar Dinner in response to individual Club Foundation events.

QUALIFICATIONS:

- It is recommended that the DRFC is a Past District Governor (PDG) who has outstanding knowledge of The Rotary Foundation. A three-year term appointment by the TRF BOD.



Rotary District 7620 Job Description

DISTRICT GRANTS SUB-COMMITTEE CHAIR

Overview

The District Grants Sub-Committee (DGSC) is comprised of subject experts in the six Areas of Focus identified by Rotary International (RI) and is not a approve or disapprove team. Under the direction of the Districts Grants Sub-Committee Chair ("Chair") is to vet and shepherd district club grant submissions – *"Not vetted if not working it."*

District 7620 has purchased a district grants database providing an efficient and transparent tool to administer club community grant submissions. This tool is the **District and Club Database**, officially referred to as "**DaCdb**." The program design provides the DGSC subject experts confidential, virtual and transparent interface platform for all committee members to view and submit comments relative only to the subject grant submission grant number.

Pursuant to the DGSC recommendation of a qualified grant to the "Chair," by an electronic signature forwards the vetted grant recommendation to the DRFC for final approval.

The grant awards are funded through established accounts identified as the District Designated Funds (DDF) and or District Project Trust Fund (PTF) IRS 501(c)(3) entities.

Role and Responsibilities

The "Chair" accepts:

1. The mission of role and responsibilities in concert with the DRFC. The DRFC allocates DDF Funds per the approval of the District Governor (DG) from The Rotary Foundation (TRF).
2. Establish and manage governance adhoc committees to address standard policies and procedures, bylaws, DGSC qualifications, etc. documents.
3. Establish routine DGSC team meetings no less than quarterly with invitation to DG & DRFC.
4. In collaboration with the DRFC oversees the administration of grants evaluation procedures by DGSC team members in a timely and efficient manner. Overseeing and taking actions necessary to assist the DGSC is fulfilling its responsibilities in supporting clubs.

5. In collaboration with the DRFC sets policy for the vetting, timely turn-around and awarding recommendations to the DRFC. Understanding that there may be "unique" situations (i.e. COVID-19), that may require extraordinary changes in policy to address the times of emergent needs and expediting approvals per the DG and DRFC.
6. In collaboration with DRFC oversees DGSC annual training on DaCdb, review updates in understanding of the TRF, annual DG grant awards eligibility guidelines, and grant Memorandum of Understanding (MOU).
7. In collaboration with the DG & DRFC in recruiting subject experts to the DGSC.
8. Assigning DGSC encourages the DGSC through interaction with clubs to promote a culture of inspiration and support to clubs. Show that we value the fairest manner possible in vetting qualified grants so as to encourage enhanced support to their club members increased contributions to the TRF Annual Fund. This is a unique situation and opportunity to be part of enhancing a Giving and Grant Culture - Promoting the Spirit and Art of Giving.
9. Promotes the participation of DGSC subject experts of the six focus areas in, but may not be limited to, Club President-Elect Trainings (Pre-PETS), Club Rotary Foundation Chairs Training and Rotary Leadership Institute (RLI).
10. Promotes to clubs the value and provide guidance to club TRF chairs on use of, application for, administration of, applying for and reporting requirements for grant approvals.
11. Participate on other District activities as requested by the DG and or DRFC.
12. Assist in succession planning.

Qualifications

1. Must be an active member in good standing with a Rotary Club for at least 5 years
2. Having served as a Club Foundation Chair is strongly desirable
3. Have served on a District Grants Committee
4. Having participated in applying for District and Global grants
5. Having past accounting/fiduciary experience in either a professional or voluntary capacity

Term of Office:

- ❖ 3 years, or at the discretion of the standing District Governor.
- ❖



Club Foundation Chair Position Description and Responsibilities

The Club Foundation Chair provides leadership to the club's efforts to support The Rotary Foundations (TRF) activities and programs. Working with each governor-elect and governor and the District Rotary Foundation chair (DRFC) every year, the Club Foundation Chair educates club members regarding the Foundation, encourages and promotes club contributions to the various Foundation funds and persuades the club to undertake district and global grants that meet community needs locally and globally.

The Club Foundation Chair will create and manage the operation of a Club Foundation Committee. The Club Foundation committee should include made up of experienced and new dedicated Rotarians who work together to in educating, training, motivating, supporting and inspiring Rotarians to participate in all Foundation programs and grants. The Club Foundation Committee serves as the liaison and link between the District Foundation Committee and club members.

Purpose: To help clubs achieve their goals and objectives related to Foundation activities, the Club Foundation Chair works with the club leadership to plan, coordinate, and evaluate Foundation related activities of the club.

Qualifications: Appointed by the club president, the Club Foundation Chair serves a single or multiple annual terms. Preference is given to Rotarians with experience in Foundation related activities and a passion for Foundation programs.

Duties and Responsibilities:

- Lead the efforts to get the club qualified for Foundation grants – district grants and global grants, per the procedures established by the District Foundation Committee
- Lead the club's effort to get Rotarians to contribute to the various Foundation Funds at different levels such as EREY and Sustaining Members for the Annual Fund, Paul Harris Fellows, Paul Harris Society, Major Donors and Bequest Society.
- Encourage the club to apply for district and global grants, using the DaCdb Grant Module (DDF) and My Rotary (Global).
- Ensure that reports on district sponsored programs and activities are submitted to the Foundation on time.
- Assist the President to establish annual Foundation goals.
- Participate in the meetings of the District Foundation Committee and the Grants Subcommittee
- Promote member and club contributions to PolioPlus and to global grants undertaken by the club or other clubs in the District.
- Collaborate and coordinate with other Club Foundation chairs and with other district committee chairs to access and utilize resources that help increase participation in Foundation programs such as grants and to increase giving. Work especially with Club PR chair to increase Club and Rotary visibility in the community.
- Encourage club participation in Foundation training opportunities.
- Recruit members to the Foundation Committee and identify and monitor successors for the Club Foundation Chair role.
- Promote member and club contributions to PolioPlus and to global grants undertaken by the club.



The Rotary Foundation is in a Class of their Own

Why should Rotary be your charity of choice?

Because our 1.2 million members see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

The Rotary Foundation is the best steward for your money. Here's why.

The Rotary Foundation received the highest possible score from Charity Navigator – 100 of 100 points – for its strong financial health and commitment to accountability and transparency.

It is twelve straight years the Rotary Foundation has earned a four-star rating from the independent evaluator of charities across the U.S., a distinction only 1 percent of charities have attained.

The Association of Fundraising Professionals likewise named the Foundation the World's Outstanding Foundation for 2016, an award previously given to other familiar names such as Kellogg and The Gates Foundation.

These organizations agree: When you donate to The Rotary Foundation, you're investing wisely. We followed your money from start to finish to discover how the Foundation ensures that your gift makes an impact for years to come.

Directing your own donation.

There's a reason Rotarians donate to The Rotary Foundation: It's a simple way to achieve your philanthropic goals – whether it's supporting clean water, the eradication of polio, or a particular global grant.

TRF, why do we need it? We are Rotarians, this is what we do !

Rotary Takes Action

The 6 Focus Areas of Rotary International



Peace and Conflict Prevention & Resolution:

- ✓ Identify triggering or accelerating factors in the conflict and work to mitigate them.
- ✓ Offer support to marginalized groups that are at risk of violence or persecution.
- ✓ Help children who have been orphaned, injured or traumatized by conflict.
- ✓ Plan Projects to engage all community stakeholders, including women, marginalized populations such as ethnic or religious minorities and opposing sides of conflict.

Disease Prevention and Treatment:

- ✓ Support health education programs that explain how diseases are spread, and promote ways to reduce risk of transmission.
- ✓ Help immunize people against infectious diseases.
- ✓ Support Continued Education and training for health workers through scholarships, stipends, and public recognition.
- ✓ Improve and expand access to low-cost and free healthcare in underserved areas.
- ✓ Partner with successful community-based healthcare organizations to strengthen and expand existing services.
- ✓ Focus on providing long-term support for community health centers.
- ✓ Partner with global health systems to increase access to equipment, facilities, and the latest healthcare programs.
- ✓ Incorporate innovative technologies.

Water, Sanitation and Hygiene:

- ✓ Improve sanitation facilities by providing toilets and latrine that flush into a sewer or safe enclosure.
- ✓ Promote good hygiene habits through education. Proper handwashing with soap and water can reduce diarrhea cases by up to 35 percent.
- ✓ Build wells to extract groundwater from underground aquifers.
- ✓ Implement rainwater harvesting systems to collect and store rainwater for drinking or recharging underground aquifers.
- ✓ Provide home water treatment capability, through the use of filters, solar disinfection, or flocculants, to make drinking water safe.
- ✓ Promote low-cost solutions, such as chlorine tablets or plastic bottles that can be exposed to sunlight, to improve water quality.

Maternal and Child Health:

- ✓ Develop or support programs that provide immunization and antibiotics. Measles, malaria, pneumonia, AIDS, and diarrheal diseases are the leading causes of death of children under five.
- ✓ Prevent mother-to-infant HIV transmission by encouraging the use of antiretroviral drugs and formula feeding.
- ✓ Promote Good Nutrition including encouraging breast feeding for most infants.
- ✓ Include water, sanitation and hygiene efforts to maximize child nutrition. Diarrheal diseases caused by contaminated water exacerbate malnutrition in children.
- ✓ Provide birth kits.
- ✓ Support accredited training programs for health professionals.
- ✓ Provide information about – and access to – contraceptives. Just filling the unmet need for contraception could reduce the number of maternal deaths by nearly one-third.
- ✓ Ensure sustainability and empower the local community to take ownership of health

Basic Education and Literacy:

- ✓ Provide teacher training and needed classroom supplies.
- ✓ Design teacher training programs and curriculums.
- ✓ Consult with experts to ensure teachers have the latest training materials.
- ✓ Send a vocational training team to offer curriculums development training in rural communities.
- ✓ Volunteer in a classroom or after school program.
- ✓ Support concentrated language encounter (CLE) literacy programs. These low-cost text or activity-based immersion programs can be effective with adults as well as children.
- ✓ Develop an adult literacy program.
- ✓ Serve as a mentor to students in your community.
- ✓ Promote student enrollment and prevent health-related absences by sponsoring school meal programs and providing safe drinking water and sanitation facilities.

Economic and Community Development:

- ✓ Partner with a local micro lender to improve access to financial services and provide financial infrastructure in the community.
- ✓ Develop mobile banking resources in partnership with a micro lender. Cell phones, which can be used to make deposits and transfer funds, can increase access to banking systems in developing communities.
- ✓ Expand vocational training opportunities, including job replacement programming, at local nonprofit organizations.
- ✓ Send a vocational training team to teach business leaders in developing communities how to create a business plan and maintain accurate financial accounting.
- ✓ Provide equipment or supplies to a cooperative to increase production and sales in the local market.
- ✓ Partner with a cooperative that provides training, joint economic ventures, and owner of assets to its members through a democratic structure.

SIX AREAS OF FOCUS

ROTARY INTERNATIONAL

**"MAY OUR
HAPPINESS
INCREASE WITH
OUR USEFULNESS.
WHAT ROTARY
WILL BE ONE
HUNDRED YEARS
HENCE, NONE
LIVING CAN
IMAGINE."**

- Paul Harris



Peace and Conflict
Prevention/Resolution



Disease Prevention
and Treatment



Water and Sanitation



Maternal and
Child Health

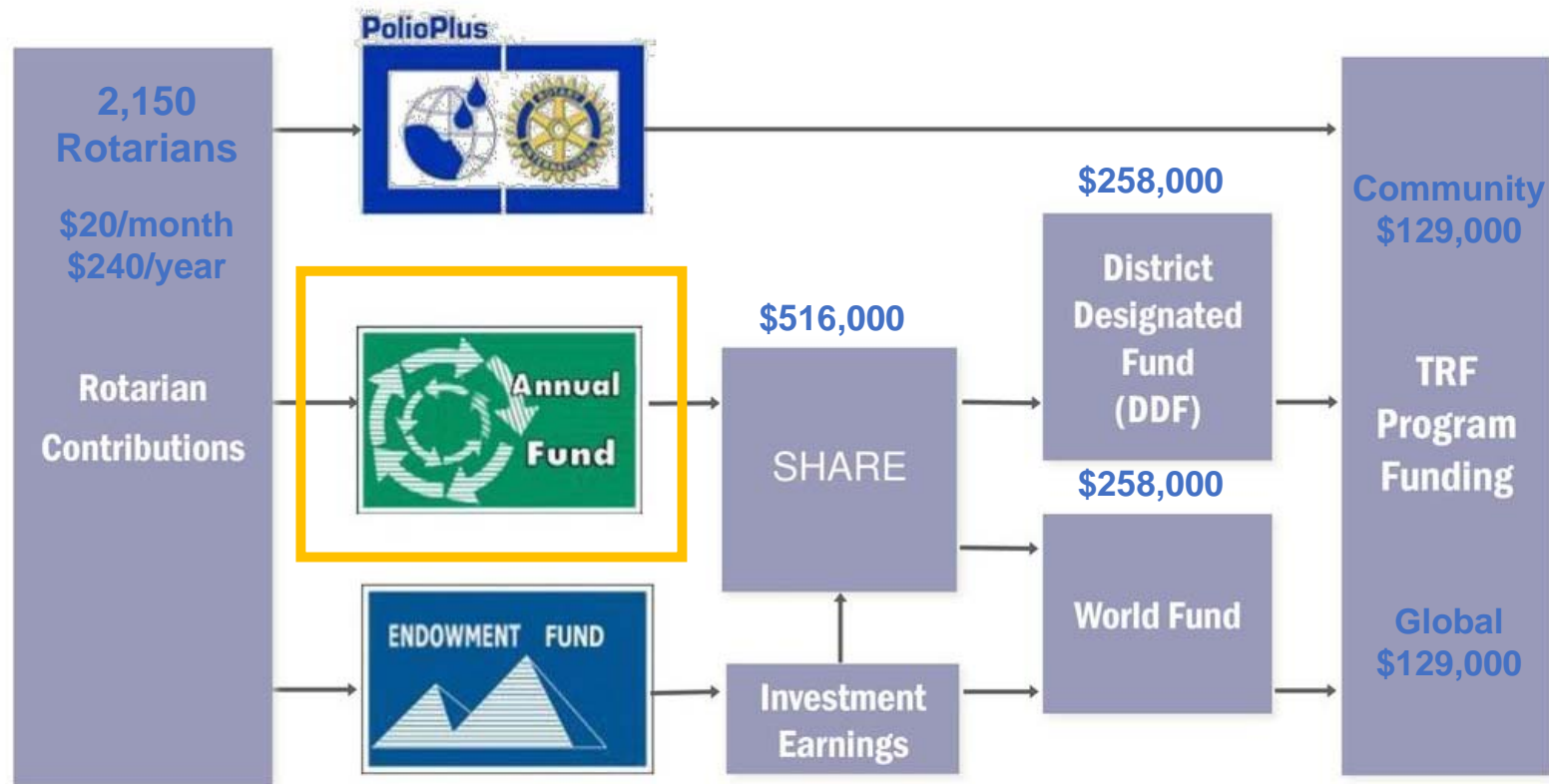


Basic Education
and Literacy



Economic and
Community Development

THE ANNUAL FUND IS THE ENGINE THAT DRIVES OUR DISTRICT GIVING





Rotary District 7620

Memorandum of Understanding Rotary Year 2020-2021

For
Clubs or District Groups Applying for
District Designated Fund Grants
Using DACdb Grants Module

This document is an official Memorandum of Understanding (MOU) between Rotary District 7620 and Clubs or District groups applying for and/or participating in District Grant Funds (DDF). It is an agreement between the local Club/District and the District Rotary Foundation "Grant" Committee explaining what measures the grant recipient will undertake to ensure proper implementation of grant activities and management of awarded funds. By authorizing this document, the recipient agrees that it will comply with all *District 7620* requirements.

1. Terms of Qualification

Upon successful completion of the qualification requirements, the Club will receive qualified status for one year.

By entering into this agreement and receiving TRF District Grant funds, the recipient understands and confirms that, as an entity, they are responsible for the use of these grant funds, regardless of which individual(s) or group controlled the funds.

The recipient must disclose any possible conflicts of interest and must comply with the Conflict of Interest Policy for Grants Participants as outlined in section 7.030 of the Rotary Foundation Code of Policies.

The recipient must cooperate with all district fiscal management requirements.
Project must fall under at least one of the 6 Areas of Focus of the Rotary Foundation.
The project and recipient comply with the published evaluation criteria.

2. Grant Recipient(s) Leadership Responsibilities for Qualification

A. The awarded organization must have Annual Share per capita giving of at least \$120 (except COVID-19 \$0.00 per cap giving).

B. Must appoint two of its members to manage qualification and ensure that stewardship measures and proper grant management practices are implemented for District Grants.

C. The recipient must establish a succession plan for the transfer of grant records to ensure retention of information and documentation.

D. The Club President and Club Foundation Chair (during the year the grant is approved) (or a designated appointee, who will be involved with the management of the grant) **must** attend grant management and qualification training arranged by the District and maintain a trained member for the term of the grant.

E. A single grant, or total of multiple club requests may NOT exceed 20% of the total DDF money available for each Rotary Year.

3. Financial Management

The recipient must follow financial management procedures that include measures to:

Maintain a complete record of all receipts and disbursements, and maintain receipts for all expenditures related to the grant project.

Disburse grant funds, as appropriate, to entities as approved in the grant application. Establish an inventory system for the control of equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities.

Maintain a plan for transferring the custody of the grant funds in the event of a change in leadership.

Ensure all grant activities, including the conversion of funds, are in accordance with local laws. District Grant funds will only be spent on eligible expenditures as designated by TRF and approved in the awarding of the grant.

4. Document Retention and Reporting on Use of Grant Funds

All records, documentation, application, accounting and reporting associated with the awarded grant must be retained by the recipient for a period of five years and be easily accessible for review by the District.

The recipient must submit all required reporting forms (final reports if project is completed or progress report if project is still in progress) and documentation of expenditures to the District by the grant deadline.

The recipient must report any changes in project funding, potential misuse or irregularities in grant-related activities to the District.

5. Fund distribution & duration of TRF District 7620 Grant Projects

The project cannot begin prior to the recipient being notified, by the District, of the amount of their awarded funds.

No funds can be expended prior to award notification and grant funds cannot be used to reimburse costs incurred prior to award notification.

The project **MUST** be completed and a final report submitted to the District Grant Chair by **May 31, 2021**, following the awarding of the grant, unless an extension is specified at the time of the awarding of the grant.

Should the recipient not submit the report in a timely manner, the recipient may jeopardize any future grant approvals for the next Rotary years.

The transfer of grant funds to the awarded recipient will be made at 50% of the requested grant amount upon review and approval of the project.

The transfer of the remaining 50% of grant funds to the awarded amount will be made upon the completion of all report requirements to the award recipient.

Each Club or group may only have 2 District grants ongoing at any one time and cannot be delinquent in reporting on any TRF funded grant.

6. Authorization and Agreement

We being responsible for administering grant activities for: the

The Rotary Club of _____, or District 7620, certify that the recipient adheres to the requirements listed in this Memorandum of Understanding and will notify Rotary International District 7620 of any changes or revisions to the recipient's policies and procedures related to these requirements.

Club President or
Club Foundation Chair

President-Elect or
Vice-chair

Term 2020-2021

Term 2020-2021

PRINTED NAME

PRINTED NAME

SIGNATURE

SIGNATURE

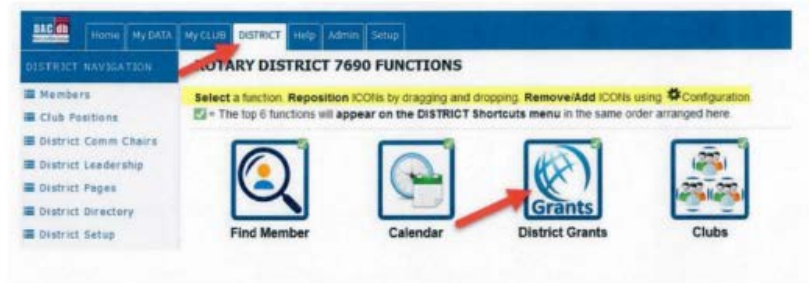
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DATE

QUICK START TO BEGIN A COMMUNITY GRANT

District Grants Process

- Applications must be submitted through DACdb Grants Module



A quick start process by steps in DACdb

A quick start process by steps in DACdb Grants Module:



- > Login to DACdb
- > Select My Club (at the top bar)
- > Click icon Club Grants
- > Grants Navigation (on the left)
- > Select Admin then click Club Signature (please add at least one signature)
- > Go to Club Grant View (on the left under Grant Navigation)
- > New Club Grant Request - Click Here to Create Grant



Rotary District 7620 - Southern Frederick County (Urbana) Glover, Richard B.

District Grants [2019-20]

A summary is shown below of all grants submitted to the District. Click on the Project Name to view below. When more than one club is working on together on a Grant, the sponsor club is designated (*) below. Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

Show Deleted? [Apply Block Grant No](#) [Change OrgYear](#)

Approved	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		Classmates4Life Film and Poster Contest	8157	New Market	Approved Grant	0.00	2,000.00	1,000.00	3,000.00
<input type="checkbox"/>		Enviro Loos-Hoodspruit	8639	Lake Shore - Severna Park	Approved Grant	0.00	1,000.00	1,000.00	2,000.00
<input type="checkbox"/>		Health Education and training to include vision sc	8438	Pikesville - Owings Mills	Approved Grant	0.00	1,000.00	4,500.00	5,500.00
<input type="checkbox"/>		Home Work Club Support	8524	Sykesville - South Carroll	Approved Grant	0.00	1,000.00	0.00	1,000.00
<input type="checkbox"/>		Homeless Services for the City of Gaithersburg.	8575	Gaithersburg	Approved Grant	0.00	1,000.00	753.00	1,753.00
<input type="checkbox"/>		Interact Club - First Outreach Project (Arundel Ho	8569	Glen Burnie	Approved Grant	0.00	1,000.00	1,000.00	2,000.00



Edit Grant: Lucas Village Playground Project [2019-20] ID=8304

Grant Status: **Project Complete** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. This Grant is **COMPLETED**. No additional changes should be made to this Grant.

[LVL-7: Change Status](#) [LVL-7: Save Grant](#) [Lvl 7: Update FINAL Report](#)

Details | Clubs Involved | Contacts | Application | Budget | Documents | Activity Log | Signature Log | Interim Report | Final Report

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name: **Lucas Village Playground Project**

* Deleted: **No** Delete flag for Grants (Note: Level-7+ function)

RI Project No: **8304** (By default, this will be set to the internal Grant No assigned)

Priority: **Medium**

* Org Year: **2019-20** (Level-7+ can change the OrgYear, if necessary)

* Round: **1** (e.g., 1 or 2)

* City: **Frederick**

* State: **Maryland**

* Country: **United States**

Target Completion Date: **12/31/2019** Target completion date for this project.

Area of Focus:

- Promoting Peace
- Promoting Clean Water, Sanitation and Hygiene
- Supporting Education
- Other:
- Fighting Disease
- Saving Mothers and Children
- Growing Local Economies

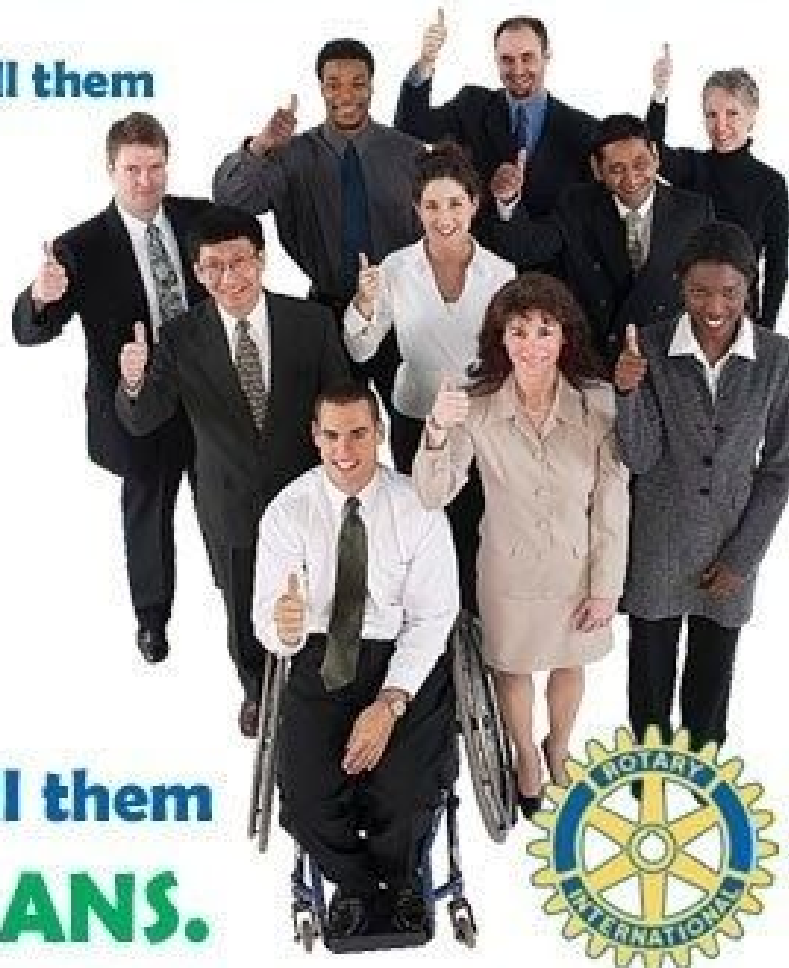
Remember to save your work !



Community Grants Awarded

Everyday more than 1.2 million people conduct humanitarian and community service projects around the world and in their local communities.

Some people call them heroes.



We just call them
ROTARIANS.

2019-2020 DDF Grants Approved

DDF Grant #DG2085975

DDF #	Date	Club	Name of Grant	DDF Match
o18	9/14/2019	Annapolis	Little Free Libraries	\$2,000.00
o21	9/15/2019	Bel Air	Triple fountain - ADA, bottle, dogs	\$4,000.00
o23	9/15/2019	Bethesda-Chevy Chase	Backpacks for Venezuela	\$2,781.00
o06	8/20/2019	Carroll Creek	Lucas Village Playground	\$5,000.00
o01	8/5/2019	Catonsville	Kitchenette, Children's Home, VR Cottage	\$1,000.00
o07	8/25/2019	Charles County (LaPlata)	Warfighter Advance Support	\$1,755.00
o24	4/18/2020	Columbia Patuxant	COVID-19:Hospice Sleeper Chairs & Staff PPE	\$2,000.00
o19	9/15/2019	Dupont Circle	Friendship Place Coat Drive	\$1,000.00
o08	8/20/2019	Ellicott City	iPads for Howard County	\$2,500.00
o25	4/20/2020	Harf, Aberd, Bel Air, Hav dG	COVID-19: Response & Relief Harford Comm Action Agen	\$5,000.00
o13	9/14/2019	Howard West	Lend-a-Hand	\$2,000.00
o20	9/15/2019	Leonardtown/ Charlotte Hall	Historic Sotterly	\$5,000.00
o14	9/14/2019	Lexington Park	Feed St. Mary's Food Bank	\$8,500.00
o02	8/5/2019	Metro Bethesda	Hydroponic Garden Towers for MCPS	\$2,634.00
o11	8/24/2019	Metro Bethesda	Creating Livable Homes for Refugees & Other Poverty	\$5,100.00
o17	9/14/2019	New Market	Messenelle Memorial Park	\$3,262.00
o10	8/24/2019	North Bethesda	Buddy Bench for Elementary School	\$1,000.00
o03	8/5/2019	Potomac	Tree House Tour de Cookie	\$3,000.00
o15	9/14/2019	Southern Fred/ New Market	Urbana Park Pump Track	\$8,000.00
o04	8/5/2019	Southern Frederick Co	Food Waste / Composting	\$10,000.00
o05	8/5/2019	Sykesville	Sound System for Boys & Girls Club	\$2,500.00
o09	8/20/2019	Townson towne	See 2 Learn	\$6,000.00
o12	8/25/2019	Washington, DC	Laptops for Students Columbia Heights Ed Center	\$8,000.00
TOTAL		26 Clubs		\$92,032.00

7620#	Date	Club	Name of Grant	District Match
Aoo01	9/15/2019	Baltimore	Dental Program, Drills / Chairs	\$5,000.00
Aoo23	9/15/2019	Bethesda-Chevy Chase	Backpacks for Venezuela	\$2,119.00
Aoo13	9/14/2019	Howard West	Lend-a-Hand	\$2,000.00
TOTAL		1 Clubs		\$9,119.00

Addtl.	Date	Club	Name of Grant	District Match
ADM		District 7620 PTF / DDF	Checks for DDF Account	\$164.88
D00.13	4/21/2020	Bonds Meadows	COVID-19: Shepard's Staff	\$835.12
Doo01		Smoketown	Tree Planting	\$500.00
Doo02		Sykesville	Homework Club	\$1,000.00
Doo03		Pikesville	Health Evaluation / Vision Screening	\$1,000.00
Doo04		Mt. Airy	Improvement Recovery Women's Home	\$1,000.00
Doo05		Ellicott City Sunrise	Shelter Box	\$1,000.00
Doo06		Glen Bernie	Homeless Youth Program	\$1,000.00
Doo07		Gaithersburg	Homeless Services	\$1,000.00
Doo08		Washington/Capitol Hill	Youth Exchange	\$1,000.00
Doo09		Washington/Capitol Hill	Youth Exchange	\$1,000.00
Doo10		Prince Frederick/Charles Co	Nambale Magnet School Library Project	\$1,000.00
Doo11		Lake Shore Severa Park	Enviro Loos-Hoedspruit	\$1,000.00
Doo12		Metro Bethesda	Recycling While Promoting Rotary	\$1,000.00
Doo14		Metro Bethesda	Sponsorship- International Women's Day Conference	\$500.00
Doo15		Middle River	Maryland School for the Blind NASA Camp	\$1,000.00
Doo16		Southern Frederick Co.	Expand Blessings In Backpack for at-risk children	\$1,000.00
TOTAL		11 Clubs		\$15,000.00

Total Submission Different Clubs: 38 63.33% District Clubs Participating

2020-2021 DDF Grants Approved

DDF Grant #DG2113183

DDF #	Date	Grant #	Club Name	Name of Grant	DDF Match
DDF.021	4/8/2020	8938	Annapolis	COVID-19: Anne Arundel County Food Support Bank	\$5,000.00
DDF.010	3/30/2020	8839	Baltimore	COVID-19: Response to Support First Responders	\$5,000.00
DDF.034	6/3/2020	0	Bethesda Chevy-Chase	COVID-19: Hunger Pandemic Haiti	\$1,727.00
DDF.033	4/9/2020	9390	Bethesda Chevy Chase	COVID-19: Bethesda Food Insecurity Relief	\$2,000.00
DDF.019	4/10/2020	8983	Bonds Meadow, Mt. Airy, Sykesville	COVID-19: PPE Carroll Hospital	\$5,000.00
DDF.025	4/13/2020	9102	Carroll Creek	COVID-19: Response & Relief	\$5,000.00
DDF.031	4/11/2020	8929	Catonsville	COVID-19: Transending Quarantine	\$1,500.00
DDF.035	5/7/2020	9402	Charlotte Hall	COVID-19: Feed St. Mary's (Food Bank)	\$2,000.00
DDF.026	4/11/2020	8982	Columbia Town Center	COVID-19: Response to Vulnerable	\$5,000.00
DDF.032	5/7/2020	9370	Downtown Silver Spring	COVID-19: Silver Spring School Family Support	\$2,000.00
DDF.030	4/11/2020	8984	Ellicott City	COVID-19: Foodbank shortages	\$1,000.00
DDF.011	3/30/2020	8841	Frederick	COVID-19: Food & More: Caring for Our Vulnerable Seniors	\$5,000.00
DDF.028	4/17/2020	9064	Gaithersburg/Olney	COVID-10: Nurture Now	\$1,646.00
DDF.020	4/11/2020	8976	Lexington Park	COVID-19: Personal Protection Equipment	\$5,000.00
DDF.007	4/7/2020	8944	Mt. Airy	COVID-19: Mt. Airy Net Med PPE DAUSA Support	\$5,000.00
DDF.014	4/3/2020	8893	Parole (A), Annapolis, Glen Burnie	COVID-19: First Responders Relief Effort	\$15,000.00
DDF.029	4/15/2020	9050	Prince Frederick / Leonardtown	COVID-19: End Hunger in Calvert Co.	\$10,000.00
DDF.015	4/7/2020	8959	Prince Georges Co	COVID-19: Disaster Aid USA Masks	\$5,000.00
DDF.009	3/27/2020	8832	Rockville	COVID-19: Emergency Food for Families in Need	\$5,000.00
DDF.017	4/9/2020	8945	Southern Frederick County	COVID-19: Urbana Food Bank	\$2,000.00
PTF.005	4/19/2020	9074	Washington, DC	COVID-19: 1MCIP-CHEC Student/Family Support	\$2,000.00
DDF.013	4/2/2020	8867	Westminster	COVID-19: Compassion Fund, Carroll Hosp Foundation	\$1,200.00

TOTAL **\$92,073.00**

2020-2021 Supplemental Grants Approved

DSF#	Date		Club Name	Name of Grant	DDF Match
Admin	4/15/2020	n/a	District 7620	Supplies - Programs	\$164.88
PTF.009	4/21/2020	9109	Bonds Meadows	PTF: COVID-19: Shepard's Staff	\$1,535.12
PTF.002	3/5/2020	8755	Charles County (La Plata)	Craik Environmental Center Benches	\$3,300.00
PTF.003	3/17/2020	8577	Charles County (La Plata)	Children's Aid Society Flooring	\$3,000.00
PTF.001	3/18/2020	8790	Metro Bethesda	PSI Community Development Project	\$4,000.00
PTF.004	3/18/2020	8789	Smoketown	Interact Club Puerto Rico Relief	\$2,000.00
PTF.010	5/13/2020	9440	So. Anne Arundel County	PTF: COVID-19: Response, South Anne Arundel County	\$2,000.00
PTF.008	4/8/2020	8951	Southern Frederick County	Lunch out of Landfills	\$2,000.00
PTF.006	3/30/2020	8844	Westminster	Carroll County Library - Career Bootcamp Program	\$1,000.00
PTF.007	4/6/2020	8899	Westminster	Image Center of MD - Bike Clinic	\$1,000.00

TOTAL **\$20,000.00**

Total Submissions: 31 Different Clubs: 33/60 District Clubs Participating: 55.0 % \$112,073.00

Global Grants



Global Grant Spending Limits 2020-2021

RGO Renée Reiling confirms “there is no global grant maximum project size” However, \$400,000 is the most World Fund will contribute to a Global Grant (GG).

1. Yes, \$400,000 is the most World Fund that can be requested for a Global Grant.
2. There is no maximum project size.
3. Yes, a Level III grant requires Trustee review. See below for details on levels.
4. Yes, grants requested a certain amount of World Fund must be reviewed by the Cadre. See below for details.

Levels of Grant Application Assessment

a) Level 1*

- i. World Fund award amount requested: US\$15,000-US\$50,000
- ii. Assessment requirements: Application review by general secretary; area of focus expert analysis, if needed.

b) Level 2*

- i. World Fund award amount: US\$50,001–US\$200,000, or
- ii. Total funding amount for applications with directed gifts or endowment earnings: US\$100,002–US\$400,000, and
- iii. Assessment requirements: Application review by general secretary; area of focus expert analysis; and interim site visit by The Rotary Foundation Cadre of Technical Advisers.

c) Level 3*

- i. World Fund award amount: US\$200,001–400,000, or
- ii. Total funding amount for applications with directed gifts or endowment earnings: US\$400,002+, and
- iii. Assessment requirements: Application review by general secretary, area of focus expert analysis, advance site visit, audit and/or interim site visit by The Rotary Foundation Cadre of Technical Advisers.

Level III Application Deadline: Level III applications must be reviewed at a Trustees’ meeting and must be submitted by the following deadlines:

- a) 1 June will be reviewed in September/October
- b) 1 October will be reviewed in January
- c) 1 December will be reviewed in April
- d) 1 March will be reviewed in June

.....
Renée Reiling
Regional Grants Officer | Rotary Grants
Tel: +1.847.866.3314
rotary.org



Important Notice from RI TRF Global Grant Cash Matching Policy Effective July 01, 2020

From: Abby McNear, Director of Grants < abby.mcnear@rotary.org >
Barbee Nancy Bender, Zone 33 RRFC < nbarbee@gmail.com >
Rich Glover, D-7620 DRFC < 18.19.dg7620@glovercrew.com >

Date: May 28, 2020 at 7:20:24 PM EDT

To: District Rotary Foundation Chairs and District Grants Subcommittee Chairs

Subject: Important Updates for Global Grants

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Global Grants

An important change is being implemented to global grant funding for 2020-21.

The global grant program has been very successful and has grown at an incredible pace since its launch in 2013. This growth, however, means that we expect the demand for global grants to dramatically exceed the capacity of the World Fund.

Because of this, the Trustees of The Rotary Foundation have decided that World Fund resources will be used to match only District Designated Fund (DDF) contributions. This match will remain at 100 percent. The match on cash contributions to grants will be eliminated, effective 1 July 2020. Global grant applications that have been submitted but not yet approved on 1 July will still receive the World Fund match for cash contributions.

Contributions to the Annual Fund are invested to produce DDF and the World Fund. Cash contributions in support of a grant do not. By supporting the Annual Fund, members can ensure a steady supply of both DDF and World Fund resources for the global grant projects that change people's lives.

In addition, due to the incredible efforts of Rotarians to address the COVID-19 pandemic, we've fully expended the global grant budget. When the pandemic hit, global grant submissions rose 33% as Rotarians moved into action. It has truly been inspiring.

Continued...

Impact of RI Matching Change in World Fund Cash will affect Clubs

There are actually two minimums that RI requires a global grant project to meet. First is the \$30K project size minimum after matching. Second is the minimum World Fund monies RI will hand out- \$15K. The second requirement is more difficult to satisfy than the first.

	(A)	(B)	(C)	(D)
	\$30K min	\$30K min	WF 15K min	WF 15K min
	Old	Current new	old	current new
Cash amount	\$ 8,600	\$ 10,000	\$ 10,000	\$ 15,000
DDF mtching percentage	100%	100%	100%	100%
DDF amount	\$ 8,600	\$ 10,000	\$ 10,000	\$ 15,000
WF match for cash	50%	0%	50%	0%
WF\$	\$ 12,900	\$ 10,000	\$ 15,000	\$ 15,000
Total	\$ 30,100	\$ 30,000	\$ 35,000	\$ 45,000

Column (A) shows the minimum a club used to have to supply to reach \$30K using the old method or \$8,600. This assumes DDF match of 100% for the full club amount. Note that the \$30K is met but not the \$15K WF min. Column (B) shows the amount using the new method. That is, a club must raise \$10,000 to get to the minimum \$30K or +16% more and still does not get to the \$15K WF number.

Both minimums must be met, so in the old method (C), to reach \$15K in WF money, a club had to raise \$10,000. In the new method (D) a club must raise \$15,000 (50% more than before) and receive a full DDF match in order to drive the WF number to the \$15K minimum. Going forward \$15K must be the minimum DDF match for a project to qualify for global monies. Quite a burden on 7620 for the next couple of years, unless we grow the Annual Fund contributions. (Thank you, Daniel Fischer, RC of MetroBethesda, Grants Committee Member for the Impact example.)

FINANCIAL TRANSPARENCY

(page 30-34 Guide to Global Grants)

The financial management plan you develop during project planning helps you keep track of grant funds, promotes transparency to all involved, and safeguards against misuse. It also facilitates reporting. The financial management plan is a guide for recordkeeping.

Open a bank account

The Rotary Foundation recommends that grant funds be managed by the host sponsor club, unless there is a reasonable business purpose for managing the funds internationally.

Follow local laws

While the Rotary Foundation attempts to follow international guidelines, laws in some countries and regions may be more stringent than Foundation requirements. It is the responsibility of both international and host sponsors to be aware of and comply with local laws. Conversely, if local laws are less stringent, the club must still meet Foundation requirements.

Transfer and disbursement of funds

After your global grant application is authorized, your club must complete the payment requirements outlined in the approval notification.

The approval notification also provides important information about making travel arrangements and getting travel insurance, in addition to the most up-to-date terms and conditions of your grant.

Keep financial records

Follow your spending plan to use grant funds for their stated purposes and in a timely manner, and keep detailed records as you do so. For most grants, a single-entry financial journal or ledger is a sufficient accounting method. Up to 10 percent of the global grant budget can be used for project management expenses, including maintaining financial records.

Retain documents

Maintain detailed records to comply with the club MOU, local laws, and standard business practices. Make copies of all documents so that project activities can continue uninterrupted if there is a fire or other catastrophe. If local laws require you to submit original information to

the Foundation, it is still necessary to keep copies of these documents. Hard copies of all documents must be stored in a secure location that Rotarians have access to.

KEEP THESE DOCUMENTS FOR YOUR RECORDS:

All grant correspondence, including email

Beneficiary documentation, including:

- The community assessment
- Any cooperating organization memoranda of understanding

Vendor documentation, including:

- Quotes
- Contracts

Grant-related documentation, including:

- Scholar and vocational training agreements
- Receipts and invoices
- Bank statements and other financial documentation
- Inventory
- Photos

Track inventory

Establish an inventory system to track equipment and other assets purchased, produced, or distributed through the grant, identifying the person or entity that possesses the items. Rotary clubs are not allowed ownership of grant assets; all grant assets must legally belong to grant beneficiaries. A record of where grant assets are located also helps both the sponsors and the community even after project implementation.

REVIEWS, VISITS, AND AUDITS

In addition to providing technical assistance to Rotary members, the Foundation's [Cadre of Technical Advisers](#) also evaluates global grant funded projects for the Foundation's Board of Trustees. The cadre may conduct these types of evaluations:

- **Technical review**
- **Site visits**
- **Audits**

POINTS TO REMEMBER

Follow your project and financial management plans and communicate with your partners and the community regularly to prevent and quickly resolve problems. Maintain transparency when disbursing grant funds by tracking all expenses and inventory and retaining documents. Also report your activities and record data regularly.

Apply for a Global Grant

www.MyRotary.org

The screenshot shows the MyRotary.org website interface. At the top, there is a dark blue navigation bar with the Rotary logo and 'My Rotary' text. The main navigation menu includes: Exchange Ideas, Take Action, Learning & Reference, Manage, The Rotary Foundation, News & Media, and Member Center. Below this, there are three columns of links: 'Apply for Grants' (with sub-links: District Grants, Global Grants, Programs of Scale Grants, Grant Center), 'Give' (with sub-links: Ways to Give, Planned Giving, Donor Recognition), and 'About' (with sub-links: Foundation Reports, History). A red arrow points from 'Grant Center' to the 'Grant Center' link in the navigation bar. Another red arrow points from 'The Rotary Foundation' to the 'Apply for a Grant' link in the Grant Center navigation bar. Below the navigation bar, there is a section for 'projects related to COVID-19' and a 'Rotary Grant Center' section with a navigation bar containing: Home, Apply for a Grant, My Grants, My Actions, and More... The main content area of the Grant Center features a banner with the text: 'Rotary Grant Center. Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.' Below the banner, there is a text box: 'Use the Grant Center to apply for a grant, track its progress, report on it, and search for other grants in your district.' A section titled 'Types of grants' provides an overview: 'Global grants support large international projects with long-term, sustainable outcomes in one or more of Rotary's areas of focus. They range from \$15,000 to \$200,000.' and 'District grants fund smaller-scale, short-term projects that address immediate needs in your community or abroad.' On the right side, there is a 'Grant Resources' section with links: 'Application Supplement for Microcredit Projects', 'Areas of Focus Policy Statements', 'Community Assessment Results', and 'Connerative Organization'.

Available DDF 2019-2020 Transactions	Description	Status	Amount	Balance
50% of Annual Fund Share contributions from 2016 - 2017			\$168,718.18	\$168,718.18
50% of Available Endowment Fund Share Earnings			\$3,388.88	\$172,107.06
Carry Forward from 2018 - 2019			\$63,272.86	\$235,379.92
Transfer	To Polio Plus Pool		(\$10,000.00)	
Transfer	From Polio Plus Pool		\$10,000.00	
Transfer	To Polio Plus Pool (T10063)		(\$10,000.00)	
Total DDF Transferred			(\$10,000.00)	\$225,379.92
Project Funding	DG2085975		(\$92,032.00)	
Project Funding	GG1981082		(\$5,000.00)	
Project Funding	GG1984218		(\$4,000.00)	
Project Funding	GG1988658		(\$10,000.00)	
Project Funding	GG1990103		(\$3,000.00)	
Project Funding	GG1990366		(\$3,000.00)	
Project Funding	GG2011355		(\$10,000.00)	
Project Funding	GG2011799		(\$5,000.00)	
Project Funding	GG2095136		(\$5,000.00)	
Project Funding	GG2095672		(\$10,000.00)	
Project Funding	GG2095782		(\$2,000.00)	
Project Funding	GG2098225		(\$2,500.00)	
Total DDF Funding			(\$151,532.00)	\$73,847.92
Actual DDF Balance				\$73,847.92
Tagged	GG2091778	Submitted	(\$1,000.00)	
Tagged	GG2092418	Submitted	(\$2,700.00)	
Tagged	GG2096305	Submitted	(\$2,000.00)	
Total DDF Tagged			(\$5,700.00)	\$68,147.92
Uncommitted DDF Balance (Estimated)				\$68,147.92
Pending Allocations	GG1983177	Authorizations	(\$15,800.00)	
Pending Allocations	GG1985730	Draft	(\$15,835.00)	
Pending Allocations	GG1989340	Draft	(\$15,000.00)	
Pending Allocations	GG2011524	Draft	(\$2,500.00)	
Pending Allocations	GG2012418	Authorizations	(\$2,500.00)	
Total DDF Pending			(\$51,635.00)	\$16,512.92
Unallocated DDF Balance (Estimated)				\$16,512.92

REMEMBER – THIS IS
THE IMPACT OF
EVERY ROTARIAN'S
INSPIRATION TO GIVE
TO TRF WHICH
COMES BACK TO **THE**
DISTRICT ENGINE
EVERY THREE YEARS.

MONTHLY EREY GIVING THROUGH ROTARY DIRECT

"THE ENGINE THAT DRIVES OUR OF DISTRICT GIVING"

Rotary Year	Per Month	Per year	D-7620 Members	SHARE 100%	World 50%	DDF 50%	Community 25%	Global 25%
2018-2019	\$13	\$152	2151	\$329,116	\$164,558	\$164,558	\$82,279	\$82,279
2019-2020	\$13	\$157	2151	\$337,438	\$168,718	\$168,718	\$84,359	\$84,359
2020-2021	\$13	\$153	2151	\$329,388	\$164,694	\$164,694	\$82,347	\$82,347
2021-2022	\$12	\$142	2151	\$305,120	\$152,560	\$152,560	\$76,280	\$76,280
2022-2023								
Consider -	\$20	\$240	2151	\$516,240	\$258,120	\$258,120	\$129,060	\$129,060
	\$30	\$360	2151	\$774,360	\$387,180	\$387,180	\$193,590	\$193,590
	\$40	\$480	2151	\$1,032,480	\$516,240	\$516,240	\$258,120	\$258,120
	\$50	\$600	2151	\$1,290,600	\$645,300	\$645,300	\$322,650	\$322,650
Join the Paul Harris Society: Monthly Giving Through Rotary Direct								
	\$85	\$1,020	\$2,151	\$2,194,020	\$1,097,010	\$1,097,010	\$548,505	\$548,505

Ways to Give to the Rotary Foundation

RECURRING GIVING (ROTARY DIRECT)

Support our efforts year round by making a recurring gift. You choose how much and how often you want to give— it's a simple and secure way to make your big impact.

Online contributions can be made monthly, quarterly, or annually. If you prefer, you may return the completed Rotary Direct enrollment form or enroll by phone at 1-866-976-8279 FREE.

To update your existing recurring giving, contact us at rotarydirect@rotary.org or call 1-866-976-8279 FREE. For security reasons, changes to your credit card information should be made by phone.

CHECK, DRAFT, OR WIRE PAYMENTS

Learn how to donate by different payment methods.

SECURITIES

Your gift of marketable securities to The Rotary Foundation provides tax benefits and helps make an impact in lives both at home and around the world.

PLANNED GIVING

The Foundation offers several ways to structure your charitable gift that may provide tax and other financial benefits, including estate gifts, charitable gift annuities, and trusts.

NAMED GIFT

With an endowed or term gift, you can designate a specific name for your contribution. Endowed gifts are invested in perpetuity, while a portion of their earnings is spent on a designated program. Term gifts are spent in their entirety on a specific program over an agreed period of time.

See named gift opportunities

DONOR ADVISED FUNDS

The Rotary Foundation donor advised fund is a convenient way to simplify charitable giving and take advantage of U.S. tax savings. A Donor Advised Fund account is similar to a charitable checking account. You make contributions and recommend grants to the Foundation and other preferred charities at your convenience. An account may be established by individuals or Rotary-affiliated groups. Log in to your Donor Advised Fund

PERSONAL PROPERTY

The Rotary Foundation accepts gifts of tangible property, such as jewelry or artwork, with the approval of the Gift Acceptance Committee. At this time, gifts of automobiles, boats, airplanes, and motorcycles are not accepted by the Foundation.

See The Rotary Foundation's Gift Acceptance Policy for a complete list of criteria along with the required documents and information, or contact us to learn more.

REAL ESTATE

The Rotary Foundation accepts gifts of real estate with a minimum appraised value of \$25,000 (undeveloped property) and \$100,000. When a donor makes an outright gift of real estate that is approved by the Gift Acceptance Committee, the Foundation takes immediate possession of and title to the property. The donor is entitled to a U.S. charitable tax deduction based upon the fair market value of the property when donated as determined by a qualified appraisal and may receive tax benefits in other countries as determined on a case by case basis. The net proceeds from the sale of the real estate support the Foundation.

For more detail about the process, please contact us to learn more. See The Rotary Foundation's Gift Acceptance Policy for a complete list of criteria along with the required documents and information.

EMPLOYEE MATCHING GIFT

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 www.rotary.org/matchinggifts.

AIRLINE MILES

Through the United Airlines Mileage Plus Charity Miles program, you can donate miles to provide free airfare toward a club or district project.



02 May 2020

Mr. Richard B. Glover
3032 Palatine Dr.
Frederick, MD, 21701
United States

Thank you for your contribution to Rotary's Annual Fund. Your gift supports positive change in communities at home and abroad.

Whether it's promoting peace and economic growth, establishing health clinics in rural villages, or providing schoolchildren with books and educational equipment, your gift helps Rotarians take action against the world's most pressing humanitarian challenges.

Your contributions ensure that Rotarians can fulfill our promise of advancing goodwill, peace, and world understanding. Thank you for taking action, and for making The Rotary Foundation's mission a part of your own.

Sincerely,

A handwritten signature in blue ink that reads "Eric Schmelling".

Eric Schmelling
Chief Philanthropy Officer
The Rotary Foundation of Rotary International

**Donation
Details**

Amount	Currency	Fund
85.00	USD	Annual Fund-SHARE

Your privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data you share with Rotary will only be used for official Rotary business. The personal data you provided will primarily be used for [Rotary fundraising purposes](#). You may receive information about Rotary and donation opportunities via email. Personal data collected when you donated is subject to Rotary's Privacy Policy found at <https://my.rotary.org/en/privacy-policy>.

The Rotary Foundation's US. Federal Tax ID No. is 36-3245072. Please retain this receipt for your tax records. No goods or services were received in exchange for this contribution unless specifically noted.

Rotary International One Rotary Center 1560 Sherman Ave. Evanston, IL 60201-3698 United States TEL: +1 866-976-8279 Email: rotarysupportcenter@rotary.org

2269955

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.

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.

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.



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 of Rotary International

Recognize the Generous Contributions

Your generous contributions to [The Rotary Foundation](#) are essential to securing and growing Rotary programs throughout the world. We recognize donors to express our gratitude for your commitment, offering individual and club recognition as well as naming opportunities that enable you to honor a friend or family member with a named or endowed gift.

Individual recognition

Rotary Foundation Sustaining Member

When you give \$100 or more per year to the Annual Fund.

Benefactor

When you include the [Endowment Fund](#) as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.

Paul Harris Fellow

When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name.

Multiple Paul Harris Fellow

When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

Paul Harris Society member

When you elect to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant.

Bequest Society

When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.

- \$10,000: Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000: Rotary's Promise crystal and named endowed fund, plus all of the above
- \$50,000: Separate named endowed funds directed to two areas of focus or districts, plus all of the above
- \$100,000: Customized Rotary's Promise crystal, plus all of the above
- \$250,000: Posthumous induction into the Arch Klumph Society, plus all of the above
- \$500,000: Special seating and registration benefits at the Rotary International Convention, plus all of the above

Major Donor

When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant. NOTE: Name recognition is not automatic and needs to be reported to **RI staff**. Recognition items commemorate giving at these levels:

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

Arch Klumph Society

When your cumulative donations reach \$250,000. Recognition includes an induction ceremony and your picture and biography in the Arch Klumph Society interactive gallery at the Rotary International headquarters in Evanston, Illinois, USA. You also receive invitations to society events, along with membership pins and crystals that commemorate giving at the following levels.

- Trustees Circle: \$250,000 to \$499,999
- Chair's Circle: \$500,000 to \$999,999
- Foundation Circle: \$1,000,000 to \$2,499,999
- Platinum Trustees Circle: \$2,500,000 to \$4,999,999
- Platinum Chair's Circle: \$5,000,000 to \$9,999,999
- Platinum Foundation Circle: \$10,000,000 and above

Legacy Society

When you promise a gift of \$1 million or more to the Endowment, you'll be listed in Rotary's annual report and invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special recognition items and all the benefits provided to Bequest Society members.

Club recognition

100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

100% Paul Harris Society Club

For clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus, or global grants within a Rotary year

100% Foundation Giving Club

For clubs that achieve an average of \$100 in per capita giving and 100 percent 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% Rotary's Promise Club

For clubs in which every dues-paying member supports the Endowment. The commitment may be for a future gift to The Rotary Foundation in an estate plan or an outright gift of \$1,000 or more to the Endowment.

Every Rotarian, Every Year Club

For clubs that 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.

Top Three Per Capita in Annual Fund Giving

For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

Naming opportunities

Special opportunities are available to create an endowment or make a directed gift in your name or the name of a loved one. Endowed gifts are invested in perpetuity, with part of their earnings spent on a designated program. Directed gifts are spent in their entirety, usually in the following Rotary year.

Endowed global grant fund

- \$500,000 or more: You can specify up to three of the following: the district sponsor, the area of focus, the general geographic region of the project, or the type of grant activity, such as a project or scholarship.
- \$250,000 or more: You may choose up to two of the options listed above
- \$150,000 or more: You may choose one grant activity type, such as a humanitarian project, scholarship, or vocational training team.

Named endowment

If you donate \$25,000 or more, you can direct the money to one of the following:

- Area of Focus: funds global grants in one area of focus
- World Fund: funds global grants in all areas of focus
- SHARE: supports the World Fund and provides district designated funds to your district
- Rotary Peace Centers: supports Rotary's partnership with leading universities around the world to train professionals in conflict resolution, peace studies, international relations, and related disciplines

Directed gift global grants

- \$150,000: A one-time gift that provides funding for global grants in up to two areas of focus of your choice or to a special initiative of the Foundation, such as WASH in Schools
- \$30,000: A one-time gift that provides your district with funds for one or more global grants in an area of focus of your choice
- \$15,000: A one-time gift that provides funding for a global grant in an area of focus of your choice without specifying the district that will sponsor the grant

Rotary Peace Centers endowment opportunities

- \$1.5 million: Endows a Rotary Peace fellow every year
- \$1 million: Endows a Rotary Peace fellow every two years
- \$1 million: Endows a visiting lecturer every year
- \$750,000: Endows a Rotary Peace fellow every three years
- \$500,000: Endows a Rotary Peace fellow every four years
- \$250,000: Endows one Rotary Peace certificate fellow every year
- \$100,000: Endows an annual seminar at a Rotary Peace Center
- \$25,000 and up: Provides general support

Rotary Peace Centers directed gifts

- \$75,000: Provides funding for a Rotary Peace Fellow to complete a two-year master's degree program
- \$75,000: Provides funding for up to 10 internships or research projects for peace fellows
- \$60,000: Provides funding for five fellows enrolled in the three-month professional development certificate program
- \$10,000: Provides general support

Rotary Peace Symposium directed gifts

- \$400,000-\$500,000: Underwrites the cost of the Peace Symposium
- \$50,000-\$100,000: Provides full funding for a donor-specified element of the peace symposium (speakers, Rotary Peace Fellow travel, etc.)
- \$10,000-\$25,000: Provides funding for a hosted reception connected to the Peace Symposium
- \$10,000 and up: Provides general support for the Peace Symposium

Entrepreneurial named gift for peace

- \$75,000-\$1 million: Funds new opportunities within Rotary's peace programs for global grants and the Rotary Peace Centers, such as workshops and retreats, and other initiatives.

Foundation Awards 2020 Categories by Club Alpha (Year-End June 30, 2019)

Last Update: 11/03/2019

7620 Clubs	Present	Title	Rep	All-Time Giving \$	Year Chartered	Years of Service
Annapolis End Polio Now, #3- PHF (93), #2- PHS (14), #2 Maj D(6)	Yes	President	Carletta Allen	\$ 713,498	2/11/1921	98
Annapolis (Parole) End Polio Now, #3- AF per Giving (\$287.18)	Yes	Past President	David Hillery	\$ 372,599	12/10/1985	34
Bethesda Chevy Chase End Polio Now, #5- PHF (54), #3- Maj D (5), #2- Benef (6)	Yes	Club TRF Chair	Katey Boerner	\$ 698,019	4/12/1933	86
Capitol Hill #3- Bequest (2)	Yes	Club TRF Chair	Roxanne Suratgar	\$ 128,005	11/19/2003	16
Carroll Creek End Polio Now, #2- PHF (109), #1- PHS (16), #1- Maj D (8), #3- Benef (5), #1- Bequest (4)	Yes	Club President	Mike Moore	\$ 940,167	8/6/1993	26
Catonsville EREY TRF Giving				\$ 41,626	5/2/2001	18
Charlotte Hall #1- Per Capita Giving (\$578.95)	Yes	Club Member	Ila Shah	\$ 377,523	6/30/1995	24
College Park #2- Per Capita Giving (\$306.15)	Yes	Past President	Nomie Hamid	\$ 587,522	5/31/1935	84
Columbia EREY TRF Giving, #4 Bequest (2)				\$ 241,090	4/18/1967	52
Columbia Patuxent End Polio Now	Yes	Club President	Linda Sorg-Ostovitz	\$ 299,303	2/18/1986	33

Columbia Town Center	EREY TRF Giving				\$ 100,159	5/27/1982	37
Downtown Silver Spring	<5 years in Charter: #3 Total Giving (\$3,520)	Yes	President	Shannon Babe-Thomas	\$ 3,520	1/15/2016	3
Frederick	End Polio Now, #1- PHF (124), #4- Maj D (5)	Yes	Club Member	Sue Hough	\$ 776,899	10/28/1920	99
Gaithersburg	End Polio Now				\$ 94,766	8/24/1966	53
Glen Bernie	#3- PHS (10)	Yes	Club President	Peter Grayson	\$ 217,822	4/4/1930	89
Greenbelt	EREY TRF Giving				\$ 48,021	5/14/1988	31
Howard West	<5 years in Charter: #1 Total Giving (\$14,010)	Yes	PDG Club Member	Jay Kumar	\$ 14,010	11/4/2014	5
Lake-Shore -Severna Park	End Polio Now	Yes	President	John Clark	\$ 321,700	12/22/1947	72
Lexington Park	End Polio Now, #6- PHF (51)	Yes	President	Regina Faden	\$ 402,950	5/7/1960	59
New Market	<5 years Charter: #2 Total Giving (\$6,000)	Yes	Past President	Jennie Coppit	\$ 6,000	6/19/2019	1
North Bethesda	End Polio Now	Yes	Dist Grants Chair	Barry Thompson	\$ 216,793	3/11/1974	45
Olney	EREY TRF Giving				\$ 87,447	6/18/1951	68
Potomac - Bethesda	EREY TRF Giving				\$ 174,288	8/4/1980	39

Prince Frederick	EREY TRF Giving				\$ 105,518	6/30/1964	55
Smoketowne (Brunswick)	<5 years in Charter: #4 Total Giving (\$920)				\$ 920	11/17/2017	2
Southern Frederick County	#6 Bequest (2)	Yes	Club Member	Gary McKee	\$ 49,194	6/29/2009	10
South Anne Arundel County	End Polio Now	Yes	Club TRF Chair	John May	\$ 120,612	6/30/2005	14
Washington DC	End Polio Now, #4- PHF (73), #1- Benefactor (8), #2- Bequest (3)	Yes	President-Elect	Nancy Riker	\$ 1,143,876	7/12/1912	107
DISTRICT 7620 Total Giving		Since Charter in 1912 of the first Club (Baltimore)			\$ 12,065,220		
Special Recognition: RC of Carroll Creek	Fastest Growing in TRF Total Giving: in just 25 years: Average Giving per Year of \$38,000:	Yes	Mike Moore		\$940,167		

NOTES:

- * End Polio Now: Annually \$1,500 or More per club
- * EREY: Minimum Annual \$100 per cap & \$25 per member

58 Clubs

7620 Clubs

\$ 12,065,220	N/A	47.06
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All-Time Giving	Chartered	Years of Service
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FORMS



THE ROTARY FOUNDATION CONTRIBUTION FORM

Contributions can also be made at rotary.org/donate.

1. DONOR OF CONTRIBUTION

Type of Donor (Check one): Individual Rotary club Rotaract club District Business Charitable organization/Foundation Other: _____

Name: _____ Donor ID: _____

Club Name: _____ Club No.: _____ District No.: _____

Billing Address: _____ City: _____ State/Province: _____

Country: _____ Postal Code: _____

Daytime Phone: _____ Email Address: _____

2. DESIGNATION/PURPOSE (Check one):

- Annual Fund — SHARE Eradicating polio Promoting peace Endowment - _____
- Fighting disease Providing clean water Saving mothers and children Global Grant # _____
- Supporting education Growing local economies Responding to disasters Other _____

3. CONTRIBUTION DETAILS

Amount of contribution _____ Currency _____

Type of Payment (Check one): **For security purposes, please do not send credit card contributions via email.**

Credit card: Visa MasterCard Diners Club JCB American Express

Make this a recurring contribution: Monthly Quarterly Annually (Select month) _____

Card Number

Expiration Date: _____ CVN*: _____

Name as it appears on credit card: _____ Signature: _____

Check — Payable to "The Rotary Foundation." Check number _____

Wire transfer Date initiated _____ (Please send completed contribution form as soon as possible after initiating a wire transfer.)

*The card verification number, or CVN, is a three-digit number that appears on the back of your credit or debit card; for AmEx, it is a four-digit number on the front of the card. It typically appears following the digits of your credit card number.

4. SHIPPING INFORMATION — Recognition materials only

If recognition materials from this contribution are requested for individual(s) other than donor, please complete the Paul Harris Fellow Recognition Transfer Request Form.

Presentation Date: _____ Please do **not** send recognition Please keep my gift anonymous

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: _____

5. INDIVIDUAL COMPLETING THIS FORM (if other than donor)

Name: _____ Daytime Phone: _____

Email Address: _____ Date: _____

Please send your completed form with contribution only once.

Data privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data shared with Rotary will only be used for official Rotary business to support Rotary's core business purposes. Personal data collected on this form is subject to Rotary's Privacy Policy found at my.rotary.org/en/privacy-policy.

Mail: The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL 60693, USA (Canada: The Rotary Foundation (Canada) c/o 911600, P.O. Box 4090 STN A, Toronto, ON M5W 0E9, Canada). **Email:** rotarysupportcenter@rotary.org. **Fax:** +1-847-328-5260. For more information, or to make a contribution by phone: 1-866-9ROTARY (1-866-976-8279). Or contact the Rotary International office that serves your area. The contribution amount may not include the value of any goods or services given to an individual donor in consideration for this contribution.

PUBLICLY TRADED SECURITIES – USA

GIFTS OF STOCK TO THE ROTARY FOUNDATION

Thank you for your interest in making a gift of securities to The Rotary Foundation. For tax purposes, your stock will be valued at the average of the high and low prices on the date of gift - this is the date that the shares are legally transferred to The Rotary Foundation's account at Pershing. **Please inform The Rotary Foundation in advance of your intent to gift securities by completing the attached Notice of Transmittal.**

1. **Complete the Notice of Transmittal of Gift Securities on page 2.** Please fax, email or mail a copy of the completed form to:

Gift Administration
The Rotary Foundation
1560 Sherman Avenue
Evanston, IL 60201 USA
Fax: 847-556-2181
Email: giftadministration@rotary.org

2. **Send the Letter of Intent on page 3 to initiate the electronic transfer with your broker.** Your broker is responsible for initiating the transfer of securities using the information provided on the Letter of Intent. Your broker may have its own form, but the Letter of Intent has the information your broker will need. Once the transfer is complete The Rotary Foundation will issue a charitable tax receipt.

Certificate Transfer or Mutual Funds

If you are interested in making a gift of **mutual funds** or if your stock is in the form of a **physical certificate**, please contact The Rotary Foundation's Gift Administration department as these types of donations may require different processing procedures.

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Please contact Gift Administration at 847-866-3380 or giftadministration@rotary.org for any questions.



NOTICE OF TRANSMITTAL OF GIFT OF SECURITIES

GIFTS OF STOCK TO THE ROTARY FOUNDATION

My gift is worth approximately \$ _____.

I have notified my broker to wire transfer _____ shares of _____ stock.
Company/Symbol

I have sent a physical certificate via certified mail to Gift Administration/The Rotary Foundation:
 _____ shares of _____ stock on _____, 201____.
Company/Symbol Date

The completed stock power form was sent under separate cover via certified mail.

I would like to speak with someone about giving a stock gift. Please call me at: _____

Please direct my gift to:

<input type="checkbox"/> Annual Fund — SHARE	<input type="checkbox"/> Endowment Fund — SHARE
<input type="checkbox"/> Annual Fund — World Fund	<input type="checkbox"/> Endowment Fund — World Fund
<input type="checkbox"/> PolioPlus	<input type="checkbox"/> Rotary Peace Centers
<input type="checkbox"/> Other	<input type="checkbox"/> Endowment Fund – Area of Focus
_____	_____

Name: _____

Address: _____

Phone: _____ Email: _____

Rotary Club: _____ District: _____

Foundation Donor ID # (if known): _____

Please mail, fax, or email this page to:

Gift Administration
 The Rotary Foundation
 1560 Sherman Avenue
 Evanston, IL 60201 USA
 Fax: 847-556-2181
 Email: giftadministration@rotary.org



Publicly Traded Securities Letter of Instruction - USA

DATE: _____

NAME OF YOUR BROKER _____

FIRM/COMPANY _____

ADDRESS _____

CITY, PROVINCE, POSTAL CODE _____

I wish to make a gift of stock to The Rotary Foundation. Please accept this letter authorizing the transfer:

_____ shares **OR** \$ _____
Dollar Amount

Of _____
Name of Stock/Symbol

From my account number # _____ and transfer securities electronically to:

Account Name:	The Rotary Foundation of Rotary International
Broker:	Pershing, LLC
Account Number:	N7M100012
DTC Number:	0443

The Rotary Foundation Tax ID: 36-3245072

Sincerely,

SIGNATURE _____

PRINT NAME _____

ADDRESS _____

CITY, PROVINCE, POSTAL CODE _____

EMAIL ADDRESS _____

PHONE NUMBER _____

In order to initiate your gift transfer, please complete this form with your broker and return a copy to the Rotary Foundation's Gift Administration Department by fax at (847)-556-2181 or by email at giftadministration@rotary.org.

THE ROTARY FOUNDATION MULTIPLE DONOR FORM

Complete this form when submitting a single contribution reflecting the combined gifts of multiple club members. Please do not send cash. Club officers can also make contributions to The Rotary Foundation on behalf of their club or multiple club members at rotary.org/donate.

Data privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data shared with Rotary will only be used for official Rotary business to support Rotary's core business purposes. Personal data collected on this form is subject to Rotary's Privacy Policy found at my.rotary.org/en/privacy-policy.

Contributions to credit Rotary Club of _____
Club Name Club # District #

1. DESIGNATION/PURPOSE (Check one):

- Annual Fund — SHARE Endowment Fund — World Fund Endowment Fund — Rotary Peace Centers
- PolioPlus Fund Endowment Fund — SHARE Responding to Disasters
- Other _____ Approved Foundation grant _____ (number mandatory)

2. CONTRIBUTION DETAILS

Amount of contribution _____ Currency _____

Credit card contributions can be made at rotary.org/donate.

Check — Payable to "The Rotary Foundation." Check number _____

Wire transfer Date initiated _____ (Please send completed contribution form as soon as possible after initiating a wire transfer.)

3. INDIVIDUAL DONOR DETAILS (Identify and allocate individual contribution amounts.)

Please provide each individual donor's membership ID, name, and personal contribution amount. Membership ID numbers may be obtained from the club secretary and are also listed on the Club Recognition Summary (CRS).

NOTE: Changes to designation can only be requested within 90 days of gift receipt date within current Rotary year.

Membership ID #	Donor Name (as appears on CRS)	Contribution Amount		Membership ID #	Donor Name (as appears on CRS)	Contribution Amount
1.				11.		
2.				12.		
3.				13.		
4.				14.		
5.				15.		
6.				16.		
7.				17.		
8.				18.		
9.				19.		
10.				20.		
Total Amount of Contribution						



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, or contact the Rotary International office that serves your area.

Contributions can be made at 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

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

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

RI EUROPE AND AFRICA OFFICE

Rotary International
 Witikonstrasse 15
 CH-8032 Zurich
 Switzerland
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rfuk@ribi.org



District & Club Reports

www.myrotary.org



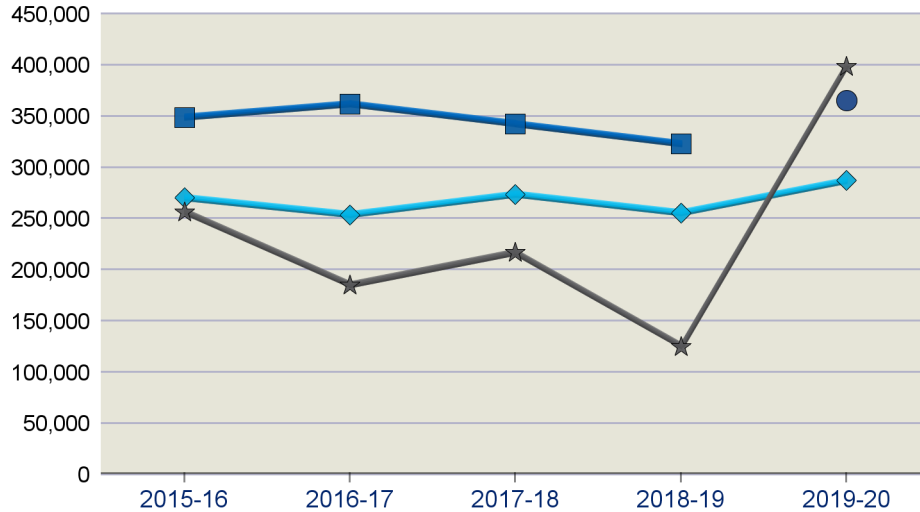
DISTRICT 7620 FUNDRAISING ANALYSIS

INTERIM RESULTS FOR JULY THROUGH MAY 2019-20

	Number of Members	Annual Fund						PolioPlus Fund					Other Funds**	Endowment Fund	Total Giving
		Goal	% Goals Received	Total	Per Capita	Goal Achieved	Non-Giving Clubs	Goal	% Goals Received	Total	Goal Achieved	Non-Giving Clubs	Total	Total	
2019-20	2,131	\$398,525	27.1%	\$287,086	\$134.72	72.0%	11	\$19,160	16.9%	\$83,981	438.3%	24	\$369,557	\$225,843	\$966,467
2018-19	2,181	\$125,150	25.9%	\$322,739	\$147.98	257.9%	1	\$29,336	25.9%	\$81,689	278.5%	21	\$76,165	\$165,509	\$646,102
2017-18	2,164	\$216,950	48.3%	\$342,355	\$158.20	157.8%	1	\$42,244	40.0%	\$87,636	207.5%	23	\$100,750	\$33,822	\$564,563
2016-17	2,279	\$184,900	49.2%	\$361,827	\$158.77	195.7%	1	\$36,750	36.1%	\$118,494	322.4%	20	\$62,618	\$29,623	\$572,563
2015-16	2,299	\$256,770	55.7%	\$348,719	\$151.68	135.8%	1	\$44,350	44.3%	\$93,913	211.8%	10	\$120,987	\$12,505	\$576,124

**Other Funds include term/directed gifts and funds for approved grants.

Annual Fund Measures



Year to Date (YTD) covers the period from July through May.

Recognition and Endowment Measures

	PHF	Bene-factor	Bequest Society*	Major Donor*	Major Gifts	EREY Eligible	Sustaining Member	PHS Eligible
All-time	6,155	179	45	144	--	--	--	--
2019-20	212	2	1	11	9	804	679	109
2018-19	340	2	1	6	8	938	837	134
2017-18	340	4	3	16	4	1,059	906	153
2016-17	315	4	2	18	8	1,129	951	150
2015-16	340	4	2	10	5	1,198	970	150

Yearly breakdowns include both new qualifiers and recognition level changes

Paul Harris Society Members: 153 **Rotary Direct Participants: 99**

Total Endowed Funds: 5 * Joint Major Donor/Bequest Society counts as one.

Market Value: \$4,896,524

Market Value Date: 31-Mar-2020

Foundation Recognition Points: 9,092.64 EREY (USD 25 starting in 2016-17), Sustaining Member, and PHS Eligible includes all individuals, not just active club members.

Recognition/Reports:

Rotary Support Center

(866) 9-ROTARY or (866) 976-8279

RotarySupportCenter@rotary.org

This is Rotary



PEACE AND
CONFLICT
PREVENTION/
RESOLUTION



MATERNAL
AND
CHILD
HEALTH

DISEASE
PREVENTION
AND
TREATMENT



BASIC
EDUCATION
AND
LITERACY

WATER
AND
SANITATION



ECONOMIC
AND
COMMUNITY
DEVELOPMENT

For more information visit www.rotary.org



Rotary District 7620 Job Description

DISTRICT GRANTS SUB-COMMITTEE CHAIR

Overview

The District Grants Sub-Committee (DGSC) is comprised of subject experts in the six Areas of Focus identified by Rotary International (RI) and is not a approve or disapprove team. Under the direction of the Districts Grants Sub-Committee Chair ("Chair") is to vet and shepherd district club grant submissions – *"Not vetted if not working it."*

District 7620 has purchased a district grants database providing an efficient and transparent tool to administer club community grant submissions. This tool is the **District and Club Database**, officially referred to as "**DaCdb**." The program design provides the DGSC subject experts confidential, virtual and transparent interface platform for all committee members to view and submit comments relative only to the subject grant submission grant number.

Pursuant to the DGSC recommendation of a qualified grant to the "Chair," by an electronic signature forwards the vetted grant recommendation to the DRFC for final approval.

The grant awards are funded through established accounts identified as the District Designated Funds (DDF) and or District Project Trust Fund (PTF) IRS 501(c)(3) entities.

Role and Responsibilities

The "Chair" accepts:

1. The mission of role and responsibilities in concert with the DRFC. The DRFC allocates DDF Funds per the approval of the District Governor (DG) from The Rotary Foundation (TRF).
2. Establish and manage governance adhoc committees to address standard policies and procedures, bylaws, DGSC qualifications, etc. documents.
3. Establish routine DGSC team meetings no less than quarterly with invitation to DG & DRFC.
4. In collaboration with the DRFC oversees the administration of grants evaluation procedures by DGSC team members in a timely and efficient manner. Overseeing and taking actions necessary to assist the DGSC is fulfilling its responsibilities in supporting clubs.

5. In collaboration with the DRFC sets policy for the vetting, timely turn-around and awarding recommendations to the DRFC. Understanding that there may be "unique" situations (i.e. COVID-19), that may require extraordinary changes in policy to address the times of emergent needs and expediting approvals per the DG and DRFC.
6. In collaboration with DRFC oversees DGSC annual training on DaCdb, review updates in understanding of the TRF, annual DG grant awards eligibility guidelines, and grant Memorandum of Understanding (MOU).
7. In collaboration with the DG & DRFC in recruiting subject experts to the DGSC.
8. Assigning DGSC encourages the DGSC through interaction with clubs to promote a culture of inspiration and support to clubs. Show that we value the fairest manner possible in vetting qualified grants so as to encourage enhanced support to their club members increased contributions to the TRF Annual Fund. This is a unique situation and opportunity to be part of enhancing a Giving and Grant Culture - Promoting the Spirit and Art of Giving.
9. Promotes the participation of DGSC subject experts of the six focus areas in, but may not be limited to, Club President-Elect Trainings (Pre-PETS), Club Rotary Foundation Chairs Training and Rotary Leadership Institute (RLI).
10. Promotes to clubs the value and provide guidance to club TRF chairs on use of, application for, administration of, applying for and reporting requirements for grant approvals.
11. Participate on other District activities as requested by the DG and or DRFC.
12. Assist in succession planning.

Qualifications

1. Must be an active member in good standing with a Rotary Club for at least 5 years
2. Having served as a Club Foundation Chair is strongly desirable
3. Have served on a District Grants Committee
4. Having participated in applying for District and Global grants
5. Having past accounting/fiduciary experience in either a professional or voluntary capacity

Term of Office:

- ❖ 3 years, or at the discretion of the standing District Governor.
- ❖



Club Foundation Chair Position Description and Responsibilities

The Club Foundation Chair provides leadership to the club's efforts to support The Rotary Foundations (TRF) activities and programs. Working with each governor-elect and governor and the District Rotary Foundation chair (DRFC) every year, the Club Foundation Chair educates club members regarding the Foundation, encourages and promotes club contributions to the various Foundation funds and persuades the club to undertake district and global grants that meet community needs locally and globally.

The Club Foundation Chair will create and manage the operation of a Club Foundation Committee. The Club Foundation committee should include made up of experienced and new dedicated Rotarians who work together to in educating, training, motivating, supporting and inspiring Rotarians to participate in all Foundation programs and grants. The Club Foundation Committee serves as the liaison and link between the District Foundation Committee and club members.

Purpose: To help clubs achieve their goals and objectives related to Foundation activities, the Club Foundation Chair works with the club leadership to plan, coordinate, and evaluate Foundation related activities of the club.

Qualifications: Appointed by the club president, the Club Foundation Chair serves a single or multiple annual terms. Preference is given to Rotarians with experience in Foundation related activities and a passion for Foundation programs.

Duties and Responsibilities:

- Lead the efforts to get the club qualified for Foundation grants – district grants and global grants, per the procedures established by the District Foundation Committee
- Lead the club's effort to get Rotarians to contribute to the various Foundation Funds at different levels such as EREY and Sustaining Members for the Annual Fund, Paul Harris Fellows, Paul Harris Society, Major Donors and Bequest Society.
- Encourage the club to apply for district and global grants, using the DaCdb Grant Module (DDF) and My Rotary (Global).
- Ensure that reports on district sponsored programs and activities are submitted to the Foundation on time.
- Assist the President to establish annual Foundation goals.
- Participate in the meetings of the District Foundation Committee and the Grants Subcommittee
- Promote member and club contributions to PolioPlus and to global grants undertaken by the club or other clubs in the District.
- Collaborate and coordinate with other Club Foundation chairs and with other district committee chairs to access and utilize resources that help increase participation in Foundation programs such as grants and to increase giving. Work especially with Club PR chair to increase Club and Rotary visibility in the community.
- Encourage club participation in Foundation training opportunities.
- Recruit members to the Foundation Committee and identify and monitor successors for the Club Foundation Chair role.
- Promote member and club contributions to PolioPlus and to global grants undertaken by the club.



The Rotary Foundation is in a Class of their Own

Why should Rotary be your charity of choice?

Because our 1.2 million members see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

The Rotary Foundation is the best steward for your money. Here's why.

The Rotary Foundation received the highest possible score from Charity Navigator – 100 of 100 points – for its strong financial health and commitment to accountability and transparency.

It is twelve straight years the Rotary Foundation has earned a four-star rating from the independent evaluator of charities across the U.S., a distinction only 1 percent of charities have attained.

The Association of Fundraising Professionals likewise named the Foundation the World's Outstanding Foundation for 2016, an award previously given to other familiar names such as Kellogg and The Gates Foundation.

These organizations agree: When you donate to The Rotary Foundation, you're investing wisely. We followed your money from start to finish to discover how the Foundation ensures that your gift makes an impact for years to come.

Directing your own donation.

There's a reason Rotarians donate to The Rotary Foundation: It's a simple way to achieve your philanthropic goals – whether it's supporting clean water, the eradication of polio, or a particular global grant.

TRF, why do we need it? We are Rotarians, this is what we do !

Rotary Takes Action

The 6 Focus Areas of Rotary International



Peace and Conflict Prevention & Resolution:

- ✓ Identify triggering or accelerating factors in the conflict and work to mitigate them.
- ✓ Offer support to marginalized groups that are at risk of violence or persecution.
- ✓ Help children who have been orphaned, injured or traumatized by conflict.
- ✓ Plan Projects to engage all community stakeholders, including women, marginalized populations such as ethnic or religious minorities and opposing sides of conflict.

Disease Prevention and Treatment:

- ✓ Support health education programs that explain how diseases are spread, and promote ways to reduce risk of transmission.
- ✓ Help immunize people against infectious diseases.
- ✓ Support Continued Education and training for health workers through scholarships, stipends, and public recognition.
- ✓ Improve and expand access to low-cost and free healthcare in underserved areas.
- ✓ Partner with successful community-based healthcare organizations to strengthen and expand existing services.
- ✓ Focus on providing long-term support for community health centers.
- ✓ Partner with global health systems to increase access to equipment, facilities, and the latest healthcare programs.
- ✓ Incorporate innovative technologies.

Water, Sanitation and Hygiene:

- ✓ Improve sanitation facilities by providing toilets and latrine that flush into a sewer or safe enclosure.
- ✓ Promote good hygiene habits through education. Proper handwashing with soap and water can reduce diarrhea cases by up to 35 percent.
- ✓ Build wells to extract groundwater from underground aquifers.
- ✓ Implement rainwater harvesting systems to collect and store rainwater for drinking or recharging underground aquifers.
- ✓ Provide home water treatment capability, through the use of filters, solar disinfection, or flocculants, to make drinking water safe.
- ✓ Promote low-cost solutions, such as chlorine tablets or plastic bottles that can be exposed to sunlight, to improve water quality.

Maternal and Child Health:

- ✓ Develop or support programs that provide immunization and antibiotics. Measles, malaria, pneumonia, AIDS, and diarrheal diseases are the leading causes of death of children under five.
- ✓ Prevent mother-to-infant HIV transmission by encouraging the use of antiretroviral drugs and formula feeding.
- ✓ Promote Good Nutrition including encouraging breast feeding for most infants.
- ✓ Include water, sanitation and hygiene efforts to maximize child nutrition. Diarrheal diseases caused by contaminated water exacerbate malnutrition in children.
- ✓ Provide birth kits.
- ✓ Support accredited training programs for health professionals.
- ✓ Provide information about – and access to – contraceptives. Just filling the unmet need for contraception could reduce the number of maternal deaths by nearly one-third.
- ✓ Ensure sustainability and empower the local community to take ownership of health

Basic Education and Literacy:

- ✓ Provide teacher training and needed classroom supplies.
- ✓ Design teacher training programs and curriculums.
- ✓ Consult with experts to ensure teachers have the latest training materials.
- ✓ Send a vocational training team to offer curriculums development training in rural communities.
- ✓ Volunteer in a classroom or after school program.
- ✓ Support concentrated language encounter (CLE) literacy programs. These low-cost text or activity-based immersion programs can be effective with adults as well as children.
- ✓ Develop an adult literacy program.
- ✓ Serve as a mentor to students in your community.
- ✓ Promote student enrollment and prevent health-related absences by sponsoring school meal programs and providing safe drinking water and sanitation facilities.

Economic and Community Development:

- ✓ Partner with a local micro lender to improve access to financial services and provide financial infrastructure in the community.
- ✓ Develop mobile banking resources in partnership with a micro lender. Cell phones, which can be used to make deposits and transfer funds, can increase access to banking systems in developing communities.
- ✓ Expand vocational training opportunities, including job replacement programming, at local nonprofit organizations.
- ✓ Send a vocational training team to teach business leaders in developing communities how to create a business plan and maintain accurate financial accounting.
- ✓ Provide equipment or supplies to a cooperative to increase production and sales in the local market.
- ✓ Partner with a cooperative that provides training, joint economic ventures, and owner of assets to its members through a democratic structure.

SIX AREAS OF FOCUS

ROTARY INTERNATIONAL

**"MAY OUR
HAPPINESS
INCREASE WITH
OUR USEFULNESS.
WHAT ROTARY
WILL BE ONE
HUNDRED YEARS
HENCE, NONE
LIVING CAN
IMAGINE."**

- Paul Harris



Peace and Conflict
Prevention/Resolution



Disease Prevention
and Treatment



Water and Sanitation



Maternal and
Child Health

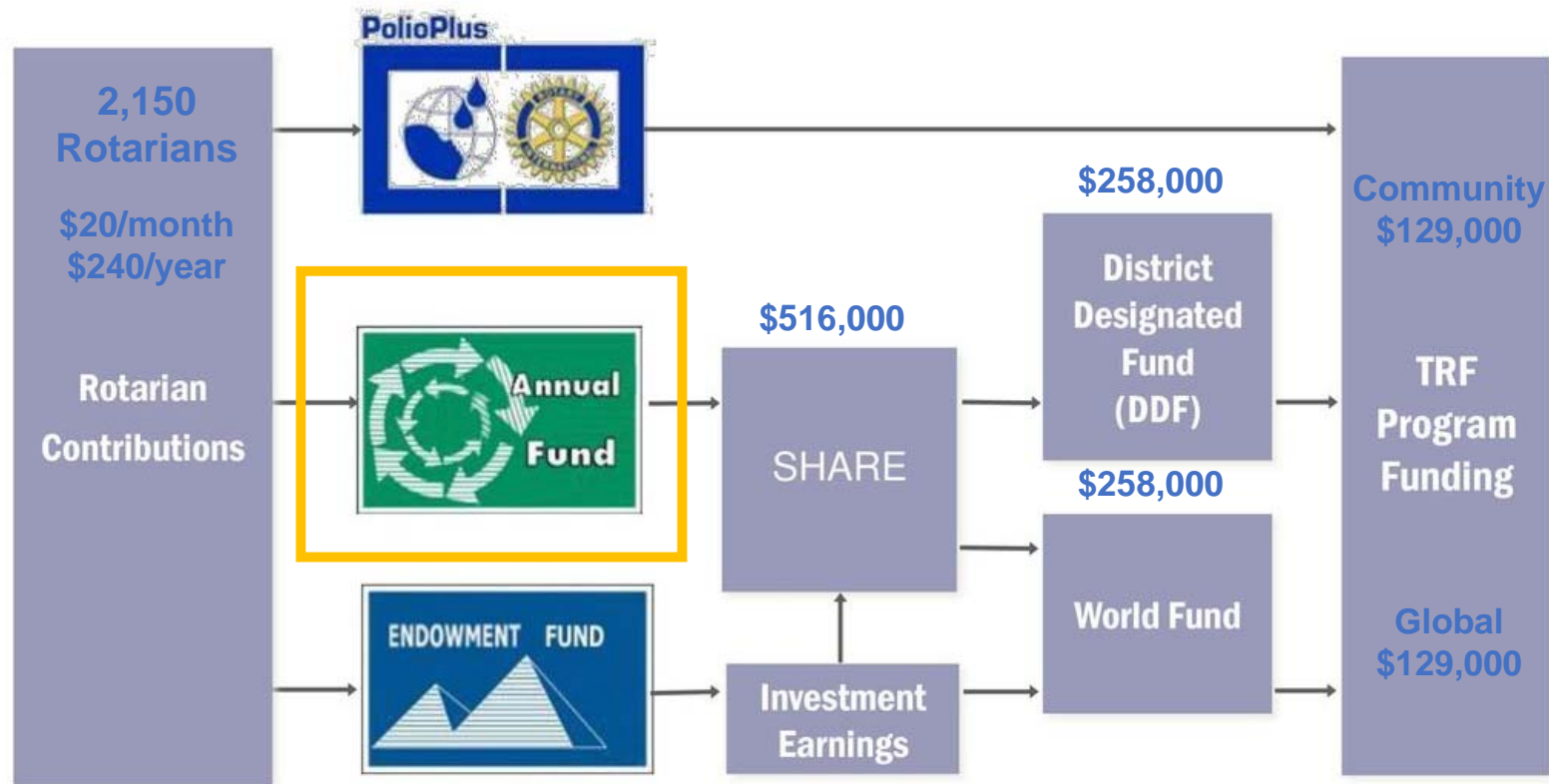


Basic Education
and Literacy



Economic and
Community Development

THE ANNUAL FUND IS THE ENGINE THAT DRIVES OUR DISTRICT GIVING





Rotary District 7620

Memorandum of Understanding Rotary Year 2020-2021

For
Clubs or District Groups Applying for
District Designated Fund Grants
Using DACdb Grants Module

This document is an official Memorandum of Understanding (MOU) between Rotary District 7620 and Clubs or District groups applying for and/or participating in District Grant Funds (DDF). It is an agreement between the local Club/District and the District Rotary Foundation "Grant" Committee explaining what measures the grant recipient will undertake to ensure proper implementation of grant activities and management of awarded funds. By authorizing this document, the recipient agrees that it will comply with all *District 7620* requirements.

1. Terms of Qualification

Upon successful completion of the qualification requirements, the Club will receive qualified status for one year.

By entering into this agreement and receiving TRF District Grant funds, the recipient understands and confirms that, as an entity, they are responsible for the use of these grant funds, regardless of which individual(s) or group controlled the funds.

The recipient must disclose any possible conflicts of interest and must comply with the Conflict of Interest Policy for Grants Participants as outlined in section 7.030 of the Rotary Foundation Code of Policies.

The recipient must cooperate with all district fiscal management requirements.
Project must fall under at least one of the 6 Areas of Focus of the Rotary Foundation.
The project and recipient comply with the published evaluation criteria.

2. Grant Recipient(s) Leadership Responsibilities for Qualification

A. The awarded organization must have Annual Share per capita giving of at least \$120 (except COVID-19 \$0.00 per cap giving).

B. Must appoint two of its members to manage qualification and ensure that stewardship measures and proper grant management practices are implemented for District Grants.

C. The recipient must establish a succession plan for the transfer of grant records to ensure retention of information and documentation.

D. The Club President and Club Foundation Chair (during the year the grant is approved) (or a designated appointee, who will be involved with the management of the grant) **must** attend grant management and qualification training arranged by the District and maintain a trained member for the term of the grant.

E. A single grant, or total of multiple club requests may NOT exceed 20% of the total DDF money available for each Rotary Year.

3. Financial Management

The recipient must follow financial management procedures that include measures to:

Maintain a complete record of all receipts and disbursements, and maintain receipts for all expenditures related to the grant project.

Disburse grant funds, as appropriate, to entities as approved in the grant application. Establish an inventory system for the control of equipment and other assets purchased with grant funds, and maintain records for items that are purchased, produced, or distributed through grant activities.

Maintain a plan for transferring the custody of the grant funds in the event of a change in leadership.

Ensure all grant activities, including the conversion of funds, are in accordance with local laws. District Grant funds will only be spent on eligible expenditures as designated by TRF and approved in the awarding of the grant.

4. Document Retention and Reporting on Use of Grant Funds

All records, documentation, application, accounting and reporting associated with the awarded grant must be retained by the recipient for a period of five years and be easily accessible for review by the District.

The recipient must submit all required reporting forms (final reports if project is completed or progress report if project is still in progress) and documentation of expenditures to the District by the grant deadline.

The recipient must report any changes in project funding, potential misuse or irregularities in grant-related activities to the District.

5. Fund distribution & duration of TRF District 7620 Grant Projects

The project cannot begin prior to the recipient being notified, by the District, of the amount of their awarded funds.

No funds can be expended prior to award notification and grant funds cannot be used to reimburse costs incurred prior to award notification.

The project MUST be completed and a final report submitted to the District Grant Chair by **May 31, 2021**, following the awarding of the grant, unless an extension is specified at the time of the awarding of the grant.

Should the recipient not submit the report in a timely manner, the recipient may jeopardize any future grant approvals for the next Rotary years.

The transfer of grant funds to the awarded recipient will be made at 50% of the requested grant amount upon review and approval of the project.

The transfer of the remaining 50% of grant funds to the awarded amount will be made upon the completion of all report requirements to the award recipient.

Each Club or group may only have 2 District grants ongoing at any one time and cannot be delinquent in reporting on any TRF funded grant.

6. Authorization and Agreement

We being responsible for administering grant activities for: the

The Rotary Club of _____, or District 7620, certify that the recipient adheres to the requirements listed in this Memorandum of Understanding and will notify Rotary International District 7620 of any changes or revisions to the recipient's policies and procedures related to these requirements.

Club President or
Club Foundation Chair

President-Elect or
Vice-chair

Term 2020-2021

Term 2020-2021

PRINTED NAME

PRINTED NAME

SIGNATURE

SIGNATURE

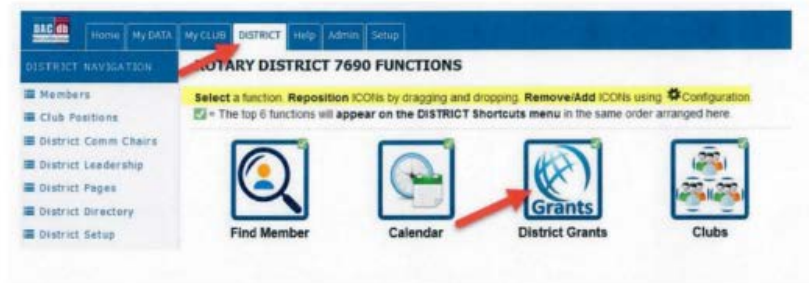
DATE

DATE

QUICK START TO BEGIN A COMMUNITY GRANT

District Grants Process

- Applications must be submitted through DACdb Grants Module



A quick start process by steps in DACdb

A quick start process by steps in DACdb Grants Module:



- > Login to DACdb
- > Select My Club (at the top bar)
- > Click icon Club Grants
- > Grants Navigation (on the left)
- > Select Admin then click Club Signature (please add at least one signature)
- > Go to Club Grant View (on the left under Grant Navigation)
- > New Club Grant Request - Click Here to Create Grant



Rotary District 7620 - Southern Frederick County (Urbana) Glover, Richard B.

District Grants [2019-20]

A summary is shown below of all grants submitted to the District. Click on the Project Name to view below. When more than one club is working on together on a Grant, the sponsor club is designated (*) below. Click on \$ below, to fund the Club grant. This will open a dialog where the Amount and Check No can be entered.

Show Deleted? [Apply Block Grant No](#) [Change OrgYear](#)

Approved	Action	Project Name	Proj No	Lead Club Name	Status	Funded Amount	Requested DDF	Other Funding	Project Budget
<input type="checkbox"/>		Classmates4Life Film and Poster Contest	8157	New Market	Approved Grant	0.00	2,000.00	1,000.00	3,000.00
<input type="checkbox"/>		Enviro Loos-Hoodspruit	8639	Lake Shore - Severna Park	Approved Grant	0.00	1,000.00	1,000.00	2,000.00
<input type="checkbox"/>		Health Education and training to include vision sc	8438	Pikesville - Owings Mills	Approved Grant	0.00	1,000.00	4,500.00	5,500.00
<input type="checkbox"/>		Home Work Club Support	8524	Sykesville - South Carroll	Approved Grant	0.00	1,000.00	0.00	1,000.00
<input type="checkbox"/>		Homeless Services for the City of Gaithersburg.	8575	Gaithersburg	Approved Grant	0.00	1,000.00	753.00	1,753.00
<input type="checkbox"/>		Interact Club - First Outreach Project (Arundel Ho	8569	Glen Burnie	Approved Grant	0.00	1,000.00	1,000.00	2,000.00



Edit Grant: Lucas Village Playground Project [2019-20] ID=8304

Grant Status: **Project Complete** This Grant is **locked** and you are unable to save changes in its current state. However, you may continue to add expenses, upload files and file reports. This Grant is **COMPLETED**. No additional changes should be made to this Grant.

[LVL-7: Change Status](#) [LVL-7: Save Grant](#) [Lvl 7: Update FINAL Report](#)

Remember to save your work !

Details | Clubs Involved | Contacts | Application | Budget | Documents | Activity Log | Signature Log | Interim Report | Final Report

Complete the basic Grant information form below. All the fields on this page must be entered to save the initial Grant application. Once the Grant is saved, the Budget and Document tabs will appear.

* Project Name: **Lucas Village Playground Project**

* Deleted: **No** Delete flag for Grants (Note: Level-7+ function)

RI Project No: **8304** (By default, this will be set to the internal Grant No assigned)

Priority: **Medium**

* Org Year: **2019-20** (Level-7+ can change the OrgYear, if necessary)

* Round: **1** (e.g., 1 or 2)

* City: **Frederick**

* State: **Maryland**

* Country: **United States**

Target Completion Date: **12/31/2019** Target completion date for this project.

Area of Focus:

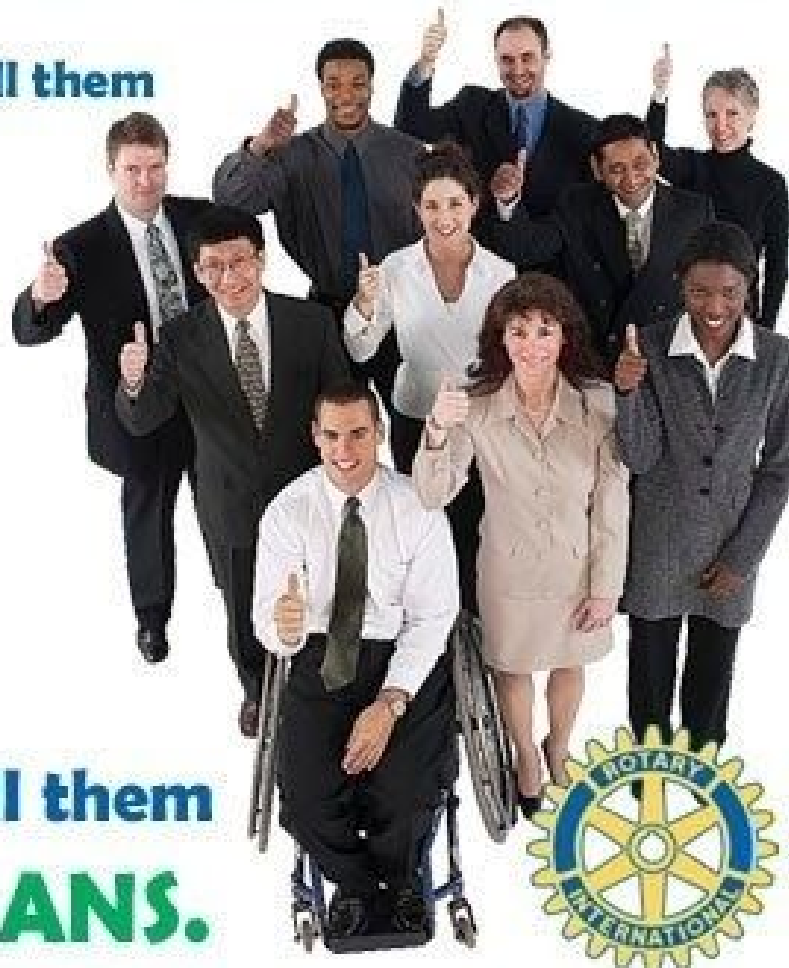
- Promoting Peace
- Promoting Clean Water, Sanitation and Hygiene
- Supporting Education
- Other:
- Fighting Disease
- Saving Mothers and Children
- Growing Local Economies



Community Grants Awarded

Everyday more than 1.2 million people conduct humanitarian and community service projects around the world and in their local communities.

Some people call them heroes.



We just call them
ROTARIANS.

2019-2020 DDF Grants Approved

DDF Grant #DG

DDF #	Cpt	Dac	Man	Date	Club	Name of Grant	DDF Match
o18	x		x	9/14/2019	Annapolis	Little Free Libraries	\$2,000.00
o21	x	x		9/15/2019	Bel Air	Triple fountain - ADA, bottle, dogs	\$4,000.00
o23	x		x	9/15/2019	Bethesda-Chevy Chase	Backpacks for Venezuela	\$2,781.00
o06	x	x		8/20/2019	Carroll Creek	Lucas Village Playground	\$5,000.00
o01	x	x		8/5/2019	Catonsville	Kitchenette, Children's Home, VR Cottage	\$1,000.00
o07	x	x		8/25/2019	Charles County (LaPlata)	Warfighter Advance Support	\$1,755.00
o24	x		x	4/18/2020	Columbia Patuxant	COVID-19:Hospice Sleeper Chairs & Staff PPE	\$2,000.00
o19	x	x		9/15/2019	Dupont Circle	Friendship Place Coat Drive	\$1,000.00
o08	x	x		8/20/2019	Ellicott City	iPads for Howard County	\$2,500.00
o25	x	x		4/20/2020	Harf, Aberd, Bel Air, Hav dG	COVID-19: Response & Relief Harford Comm Action Ag	\$5,000.00
o13	x		x	9/14/2019	Howard West	Lend-a-Hand	\$2,000.00
o20	x		x	9/15/2019	Leonardtown/ Charlotte Hall	Historic Sotterly	\$5,000.00
o14	x		x	9/14/2019	Lexington Park	Feed St. Mary's Food Bank	\$8,500.00
o02	x	x		8/5/2019	Metro Bethesda	Hydroponic Garden Towers for MCPS	\$2,634.00
o11	x	x		8/24/2019	Metro Bethesda	Creating Livable Homes for Refugees & Other Poverty	\$5,100.00
o17	x	x		9/14/2019	New Market	Messenelle Memorial Park	\$3,262.00
o10	x	x		8/24/2019	North Bethesda	Buddy Bench for Elementary School	\$1,000.00
o03	x	x		8/5/2019	Potomac	Tree House Tour de Cookie	\$3,000.00
o15	x	x		9/14/2019	Southern Fred/ New Market	Urbana Park Pump Track	\$8,000.00
o04	x	x		8/5/2019	Southern Frederick Co	Food Waste / Composting	\$10,000.00
o05		x		8/5/2019	Sykesville	Sound System for Boys & Girls Club	\$2,500.00
o09	x		x	8/20/2019	Townson towne	See 2 Learn	\$6,000.00
o12	x	x		8/25/2019	Washington, DC	Laptops for Students Columbia Heights Ed Center	\$8,000.00
TOTAL				26 Clubs			\$92,032.00

7620#	Cpt	Dac	Man	Date	Club	Name of Grant	District Match
Aoo01	x		x	9/15/2019	Baltimore	Dental Program, Drills / Chairs	\$5,000.00
Aoo23	x		x	9/15/2019	Bethesda-Chevy Chase	Backpacks for Venezuela	\$2,119.00
Aoo13	x		x	9/14/2019	Howard West	Lend-a-Hand	\$2,000.00
TOTAL				1 Clubs			\$9,119.00

Addtl.	Cpt	Dac	Man	Date	Club	Name of Grant	District Match
ADM					District 7620 PTF / DDF	Checks for DDF Account	\$164.88
D00.13	x	x		4/21/2020	Bonds Meadows	COVID-19: Shepard's Staff	\$835.12
Doo01	x	x			Smoketown	Tree Planting	\$500.00
Doo02	x	x			Sykesville	Homework Club	\$1,000.00
Doo03		x			Pikesville	Health Evaluation / Vision Screening	\$1,000.00
Doo04	x	x			Mt. Airy	Improvement Recovery Women's Home	\$1,000.00
Doo05	x	x			Ellicott City Sunrise	Shelter Box	\$1,000.00
Doo06	x	x			Glen Bernie	Homeless Youth Program	\$1,000.00
Doo07		x			Gaithersburg	Homeless Services	\$1,000.00
Doo08	x	x			Washington/Capitol Hill	Youth Exchange	\$1,000.00
Doo09	x	x			Washington/Capitol Hill	Youth Exchange	\$1,000.00
Doo10	x	x			Prince Frederick/Charles Co	Nambale Magnet School Library Project	\$1,000.00
Doo11		x			Lake Shore Severa Park	Enviro Loos-Hoedspruit	\$1,000.00
Doo12	x	x			Metro Bethesda	Recycling While Promoting Rotary	\$1,000.00
Doo14	x	x			Metro Bethesda	Sponsorship- International Women's Day Conference	\$500.00
Doo15	x	x			Middle River	Maryland School for the Blind NASA Camp	\$1,000.00
Doo16	x	x			Southern Frederick Co.	Expand Blessings In Backpack for at-risk children	\$1,000.00
TOTAL				11 Clubs			\$15,000.00

Total Submissions: 40 Different Clubs: 38 63.33% District Clubs Participating

Global Grants



Global Grant Spending Limits 2020-2021

RGO Renée Reiling confirms “there is no global grant maximum project size” However, \$400,000 is the most World Fund will contribute to a Global Grant (GG).

1. Yes, \$400,000 is the most World Fund that can be requested for a Global Grant.
2. There is no maximum project size.
3. Yes, a Level III grant requires Trustee review. See below for details on levels.
4. Yes, grants requested a certain amount of World Fund must be reviewed by the Cadre. See below for details.

Levels of Grant Application Assessment

- a) Level 1*
 - i. World Fund award amount requested: US\$15,000-US\$50,000
 - ii. Assessment requirements: Application review by general secretary; area of focus expert analysis, if needed.

- b) Level 2*
 - i. World Fund award amount: US\$50,001–US\$200,000, or
 - ii. Total funding amount for applications with directed gifts or endowment earnings: US\$100,002–US\$400,000, and
 - iii. Assessment requirements: Application review by general secretary; area of focus expert analysis; and interim site visit by The Rotary Foundation Cadre of Technical Advisers.

- c) Level 3*
 - i. World Fund award amount: US\$200,001–400,000, or
 - ii. Total funding amount for applications with directed gifts or endowment earnings: US\$400,002+, and
 - iii. Assessment requirements: Application review by general secretary, area of focus expert analysis, advance site visit, audit and/or interim site visit by The Rotary Foundation Cadre of Technical Advisers.

Level III Application Deadline: Level III applications must be reviewed at a Trustees’ meeting and must be submitted by the following deadlines:

- a) 1 June will be reviewed in September/October
- b) 1 October will be reviewed in January
- c) 1 December will be reviewed in April
- d) 1 March will be reviewed in June

.....
Renée Reiling
Regional Grants Officer | Rotary Grants
Tel: +1.847.866.3314
rotary.org



Important Notice from RI TRF Global Grant Cash Matching Policy Effective July 01, 2020

From: Abby McNear, Director of Grants < abby.mcnear@rotary.org >
Barbee Nancy Bender, Zone 33 RRFC < nbarbee@gmail.com >
Rich Glover, D-7620 DRFC < 18.19.dg7620@glovercrew.com >

Date: May 28, 2020 at 7:20:24 PM EDT

To: District Rotary Foundation Chairs and District Grants Subcommittee Chairs

Subject: Important Updates for Global Grants

< Copied and pasted >

Global Grants

An important change is being implemented to global grant funding for 2020-21.

The global grant program has been very successful and has grown at an incredible pace since its launch in 2013. This growth, however, means that we expect the demand for global grants to dramatically exceed the capacity of the World Fund.

Because of this, the Trustees of The Rotary Foundation have decided that World Fund resources will be used to match only District Designated Fund (DDF) contributions. This match will remain at 100 percent. The match on cash contributions to grants will be eliminated, effective 1 July 2020. Global grant applications that have been submitted but not yet approved on 1 July will still receive the World Fund match for cash contributions.

Contributions to the Annual Fund are invested to produce DDF and the World Fund. Cash contributions in support of a grant do not. By supporting the Annual Fund, members can ensure a steady supply of both DDF and World Fund resources for the global grant projects that change people's lives.

In addition, due to the incredible efforts of Rotarians to address the COVID-19 pandemic, we've fully expended the global grant budget. When the pandemic hit, global grant submissions rose 33% as Rotarians moved into action. It has truly been inspiring.

Continued...

Impact of RI Matching Change in World Fund Cash will affect Clubs

There are actually two minimums that RI requires a global grant project to meet. First is the \$30K project size minimum after matching. Second is the minimum World Fund monies RI will hand out- \$15K. The second requirement is more difficult to satisfy than the first.

	(A)	(B)	(C)	(D)
	\$30K min	\$30K min	WF 15K min	WF 15K min
	Old	Current new	old	current new
Cash amount	\$ 8,600	\$ 10,000	\$ 10,000	\$ 15,000
DDF mtching percentage	100%	100%	100%	100%
DDF amount	\$ 8,600	\$ 10,000	\$ 10,000	\$ 15,000
WF match for cash	50%	0%	50%	0%
WF\$	\$ 12,900	\$ 10,000	\$ 15,000	\$ 15,000
Total	\$ 30,100	\$ 30,000	\$ 35,000	\$ 45,000

Column (A) shows the minimum a club used to have to supply to reach \$30K using the old method or \$8,600. This assumes DDF match of 100% for the full club amount. Note that the \$30K is met but not the \$15K WF min. Column (B) shows the amount using the new method. That is, a club must raise \$10,000 to get to the minimum \$30K or +16% more and still does not get to the \$15K WF number.

Both minimums must be met, so in the old method (C), to reach \$15K in WF money, a club had to raise \$10,000. In the new method (D) a club must raise \$15,000 (50% more than before) and receive a full DDF match in order to drive the WF number to the \$15K minimum. Going forward \$15K must be the minimum DDF match for a project to qualify for global monies. Quite a burden on 7620 for the next couple of years, unless we grow the Annual Fund contributions. (Thank you, Daniel Fischer, RC of MetroBethesda, Grants Committee Member for the Impact example.)

FINANCIAL TRANSPARENCY

(page 30-34 Guide to Global Grants)

The financial management plan you develop during project planning helps you keep track of grant funds, promotes transparency to all involved, and safeguards against misuse. It also facilitates reporting. The financial management plan is a guide for recordkeeping.

Open a bank account

The Rotary Foundation recommends that grant funds be managed by the host sponsor club, unless there is a reasonable business purpose for managing the funds internationally.

Follow local laws

While the Rotary Foundation attempts to follow international guidelines, laws in some countries and regions may be more stringent than Foundation requirements. It is the responsibility of both international and host sponsors to be aware of and comply with local laws. Conversely, if local laws are less stringent, the club must still meet Foundation requirements.

Transfer and disbursement of funds

After your global grant application is authorized, your club must complete the payment requirements outlined in the approval notification.

The approval notification also provides important information about making travel arrangements and getting travel insurance, in addition to the most up-to-date terms and conditions of your grant.

Keep financial records

Follow your spending plan to use grant funds for their stated purposes and in a timely manner, and keep detailed records as you do so. For most grants, a single-entry financial journal or ledger is a sufficient accounting method. Up to 10 percent of the global grant budget can be used for project management expenses, including maintaining financial records.

Retain documents

Maintain detailed records to comply with the club MOU, local laws, and standard business practices. Make copies of all documents so that project activities can continue uninterrupted if there is a fire or other catastrophe. If local laws require you to submit original information to

the Foundation, it is still necessary to keep copies of these documents. Hard copies of all documents must be stored in a secure location that Rotarians have access to.

KEEP THESE DOCUMENTS FOR YOUR RECORDS:

All grant correspondence, including email

Beneficiary documentation, including:

- The community assessment
- Any cooperating organization memoranda of understanding

Vendor documentation, including:

- Quotes
- Contracts

Grant-related documentation, including:

- Scholar and vocational training agreements
- Receipts and invoices
- Bank statements and other financial documentation
- Inventory
- Photos

Track inventory

Establish an inventory system to track equipment and other assets purchased, produced, or distributed through the grant, identifying the person or entity that possesses the items. Rotary clubs are not allowed ownership of grant assets; all grant assets must legally belong to grant beneficiaries. A record of where grant assets are located also helps both the sponsors and the community even after project implementation.

REVIEWS, VISITS, AND AUDITS

In addition to providing technical assistance to Rotary members, the Foundation's [Cadre of Technical Advisers](#) also evaluates global grant funded projects for the Foundation's Board of Trustees. The cadre may conduct these types of evaluations:

- **Technical review**
- **Site visits**
- **Audits**

POINTS TO REMEMBER

Follow your project and financial management plans and communicate with your partners and the community regularly to prevent and quickly resolve problems. Maintain transparency when disbursing grant funds by tracking all expenses and inventory and retaining documents. Also report your activities and record data regularly.

Apply for a Global Grant

www.MyRotary.org

The screenshot shows the MyRotary.org website interface. At the top, there is a dark blue navigation bar with the Rotary logo and 'My Rotary' text. The main navigation menu includes: Exchange Ideas, Take Action, Learning & Reference, Manage, The Rotary Foundation, News & Media, and Member Center. Below this, there are three columns of links: 'Apply for Grants' (with sub-links: District Grants, Global Grants, Programs of Scale Grants, Grant Center), 'Give' (with sub-links: Ways to Give, Planned Giving, Donor Recognition), and 'About' (with sub-links: Foundation Reports, History). A red arrow points from 'Grant Center' to the 'Grant Center' link in the navigation bar. Another red arrow points from 'The Rotary Foundation' to the 'Apply for a Grant' link in the Grant Center navigation bar. Below the navigation bar, there is a section for 'projects related to COVID-19' and a 'Rotary Grant Center' section with a navigation bar containing: Home, Apply for a Grant, My Grants, My Actions, and More... The main content area of the Grant Center features a banner with the text: 'Rotary Grant Center. Welcome to Rotary grants! As Rotary members, we contribute our skills, expertise, and resources to solve some of the world's most serious problems. From providing clean water in local communities to promoting peace worldwide, Rotary grants can bring your project ideas to life.' Below the banner, there is a section titled 'Use the Grant Center to apply for a grant, track its progress, report on it, and search for other grants in your district.' followed by 'Types of grants' which lists 'Global grants' and 'District grants'. On the right side, there is a 'Grant Resources' section with links for 'Application Supplement for Microcredit Projects', 'Areas of Focus Policy Statements', 'Community Assessment Results', and 'Connerative Organization'.

Available DDF 2019-2020 Transactions	Description	Status	Amount	Balance
50% of Annual Fund Share contributions from 2016 - 2017			\$168,718.18	\$168,718.18
50% of Available Endowment Fund Share Earnings			\$3,388.88	\$172,107.06
Carry Forward from 2018 - 2019			\$63,272.86	\$235,379.92
Transfer	To Polio Plus Pool		(\$10,000.00)	
Transfer	From Polio Plus Pool		\$10,000.00	
Transfer	To Polio Plus Pool (T10063)		(\$10,000.00)	
Total DDF Transferred			(\$10,000.00)	\$225,379.92
Project Funding	DG2085975		(\$92,032.00)	
Project Funding	GG1981082		(\$5,000.00)	
Project Funding	GG1984218		(\$4,000.00)	
Project Funding	GG1988658		(\$10,000.00)	
Project Funding	GG1990103		(\$3,000.00)	
Project Funding	GG1990366		(\$3,000.00)	
Project Funding	GG2011355		(\$10,000.00)	
Project Funding	GG2011799		(\$5,000.00)	
Project Funding	GG2095136		(\$5,000.00)	
Project Funding	GG2095672		(\$10,000.00)	
Project Funding	GG2095782		(\$2,000.00)	
Project Funding	GG2098225		(\$2,500.00)	
Total DDF Funding			(\$151,532.00)	\$73,847.92
Actual DDF Balance				\$73,847.92
Tagged	GG2091778	Submitted	(\$1,000.00)	
Tagged	GG2092418	Submitted	(\$2,700.00)	
Tagged	GG2096305	Submitted	(\$2,000.00)	
Total DDF Tagged			(\$5,700.00)	\$68,147.92
Uncommitted DDF Balance (Estimated)				\$68,147.92
Pending Allocations	GG1983177	Authorizations	(\$15,800.00)	
Pending Allocations	GG1985730	Draft	(\$15,835.00)	
Pending Allocations	GG1989340	Draft	(\$15,000.00)	
Pending Allocations	GG2011524	Draft	(\$2,500.00)	
Pending Allocations	GG2012418	Authorizations	(\$2,500.00)	
Total DDF Pending			(\$51,635.00)	\$16,512.92
Unallocated DDF Balance (Estimated)				\$16,512.92

REMEMBER – THIS IS
THE IMPACT OF
EVERY ROTARIAN'S
INSPIRATION TO GIVE
TO TRF WHICH
COMES BACK TO **THE**
DISTRICT ENGINE
EVERY THREE YEARS.

**Monthly EREY giving through Rotary Direct
The Engine that drives our District Giving**

Rotary Year	Per Month	Per year	D-7620 Members	SHARE 100%	World 50%	DDF 50%	Community 25%	Global 25%
2021-2022	\$12	\$142	2151	\$305,120	\$152,560	\$152,560	\$76,280	\$76,280
2018-2019	\$13	\$152	2151	\$329,116	\$164,558	\$164,558	\$82,279	\$82,279
2020-2021	\$13	\$153	2151	\$329,388	\$164,694	\$164,694	\$82,347	\$82,347
2019-2020	\$13	\$157	2151	\$337,438	\$168,718	\$168,718	\$84,359	\$84,359
	\$20	\$240	2151	\$516,240	\$258,120	\$258,120	\$129,060	\$129,060
	\$30	\$360	2151	\$774,360	\$387,180	\$387,180	\$193,590	\$193,590
	\$40	\$480	2151	\$1,032,480	\$516,240	\$516,240	\$258,120	\$258,120
	\$50	\$600	2151	\$1,290,600	\$645,300	\$645,300	\$322,650	\$322,650

Paul Harris Society: Monthly Giving through Rotary Direct

\$85	\$1,020	\$2,151	\$2,194,020	\$1,097,010	\$1,097,010	\$548,505	\$548,505
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Ways to Give to the Rotary Foundation

RECURRING GIVING (ROTARY DIRECT)

Support our efforts year round by making a recurring gift. You choose how much and how often you want to give— it's a simple and secure way to make your big impact.

Online contributions can be made monthly, quarterly, or annually. If you prefer, you may return the completed Rotary Direct enrollment form or enroll by phone at 1-866-976-8279 FREE.

To update your existing recurring giving, contact us at rotarydirect@rotary.org or call 1-866-976-8279 FREE. For security reasons, changes to your credit card information should be made by phone.

CHECK, DRAFT, OR WIRE PAYMENTS

Learn how to donate by different payment methods.

SECURITIES

Your gift of marketable securities to The Rotary Foundation provides tax benefits and helps make an impact in lives both at home and around the world.

PLANNED GIVING

The Foundation offers several ways to structure your charitable gift that may provide tax and other financial benefits, including estate gifts, charitable gift annuities, and trusts.

NAMED GIFT

With an endowed or term gift, you can designate a specific name for your contribution. Endowed gifts are invested in perpetuity, while a portion of their earnings is spent on a designated program. Term gifts are spent in their entirety on a specific program over an agreed period of time.

See named gift opportunities

DONOR ADVISED FUNDS

The Rotary Foundation donor advised fund is a convenient way to simplify charitable giving and take advantage of U.S. tax savings. A Donor Advised Fund account is similar to a charitable checking account. You make contributions and recommend grants to the Foundation and other preferred charities at your convenience. An account may be established by individuals or Rotary-affiliated groups. Log in to your Donor Advised Fund

PERSONAL PROPERTY

The Rotary Foundation accepts gifts of tangible property, such as jewelry or artwork, with the approval of the Gift Acceptance Committee. At this time, gifts of automobiles, boats, airplanes, and motorcycles are not accepted by the Foundation.

See The Rotary Foundation's Gift Acceptance Policy for a complete list of criteria along with the required documents and information, or contact us to learn more.

REAL ESTATE

The Rotary Foundation accepts gifts of real estate with a minimum appraised value of \$25,000 (undeveloped property) and \$100,000. When a donor makes an outright gift of real estate that is approved by the Gift Acceptance Committee, the Foundation takes immediate possession of and title to the property. The donor is entitled to a U.S. charitable tax deduction based upon the fair market value of the property when donated as determined by a qualified appraisal and may receive tax benefits in other countries as determined on a case by case basis. The net proceeds from the sale of the real estate support the Foundation.

For more detail about the process, please contact us to learn more. See The Rotary Foundation's Gift Acceptance Policy for a complete list of criteria along with the required documents and information.

EMPLOYEE MATCHING GIFT

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 www.rotary.org/matchinggifts.

AIRLINE MILES

Through the United Airlines Mileage Plus Charity Miles program, you can donate miles to provide free airfare toward a club or district project.



02 May 2020

Mr. Richard B. Glover
3032 Palatine Dr.
Frederick, MD, 21701
United States

Thank you for your contribution to Rotary's Annual Fund. Your gift supports positive change in communities at home and abroad.

Whether it's promoting peace and economic growth, establishing health clinics in rural villages, or providing schoolchildren with books and educational equipment, your gift helps Rotarians take action against the world's most pressing humanitarian challenges.

Your contributions ensure that Rotarians can fulfill our promise of advancing goodwill, peace, and world understanding. Thank you for taking action, and for making The Rotary Foundation's mission a part of your own.

Sincerely,

A handwritten signature in blue ink that reads "Eric Schmelling".

Eric Schmelling
Chief Philanthropy Officer
The Rotary Foundation of Rotary International

**Donation
Details**

Amount	Currency	Fund
85.00	USD	Annual Fund-SHARE

Your privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data you share with Rotary will only be used for official Rotary business. The personal data you provided will primarily be used for [Rotary fundraising purposes](#). You may receive information about Rotary and donation opportunities via email. Personal data collected when you donated is subject to Rotary's Privacy Policy found at <https://my.rotary.org/en/privacy-policy>.

The Rotary Foundation's US. Federal Tax ID No. is 36-3245072. Please retain this receipt for your tax records. No goods or services were received in exchange for this contribution unless specifically noted.

Rotary International One Rotary Center 1560 Sherman Ave. Evanston, IL 60201-3698 United States TEL: +1 866-976-8279 Email: rotarysupportcenter@rotary.org

2269955

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.

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.

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.



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 of Rotary International

Recognize the Generous Contributions

Your generous contributions to [The Rotary Foundation](#) are essential to securing and growing Rotary programs throughout the world. We recognize donors to express our gratitude for your commitment, offering individual and club recognition as well as naming opportunities that enable you to honor a friend or family member with a named or endowed gift.

Individual recognition

Rotary Foundation Sustaining Member

When you give \$100 or more per year to the Annual Fund.

Benefactor

When you include the [Endowment Fund](#) as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.

Paul Harris Fellow

When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name.

Multiple Paul Harris Fellow

When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

Paul Harris Society member

When you elect to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant.

Bequest Society

When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.

- \$10,000: Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000: Rotary's Promise crystal and named endowed fund, plus all of the above
- \$50,000: Separate named endowed funds directed to two areas of focus or districts, plus all of the above
- \$100,000: Customized Rotary's Promise crystal, plus all of the above
- \$250,000: Posthumous induction into the Arch Klumph Society, plus all of the above
- \$500,000: Special seating and registration benefits at the Rotary International Convention, plus all of the above

Major Donor

When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant. NOTE: Name recognition is not automatic and needs to be reported to [RI staff](#). Recognition items commemorate giving at these levels:

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

Arch Klumph Society

When your cumulative donations reach \$250,000. Recognition includes an induction ceremony and your picture and biography in the Arch Klumph Society interactive gallery at the Rotary International headquarters in Evanston, Illinois, USA. You also receive invitations to society events, along with membership pins and crystals that commemorate giving at the following levels.

- Trustees Circle: \$250,000 to \$499,999
- Chair's Circle: \$500,000 to \$999,999
- Foundation Circle: \$1,000,000 to \$2,499,999
- Platinum Trustees Circle: \$2,500,000 to \$4,999,999
- Platinum Chair's Circle: \$5,000,000 to \$9,999,999
- Platinum Foundation Circle: \$10,000,000 and above

Legacy Society

When you promise a gift of \$1 million or more to the Endowment, you'll be listed in Rotary's annual report and invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special recognition items and all the benefits provided to Bequest Society members.

Club recognition

100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

100% Paul Harris Society Club

For clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus, or global grants within a Rotary year

100% Foundation Giving Club

For clubs that achieve an average of \$100 in per capita giving and 100 percent 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% Rotary's Promise Club

For clubs in which every dues-paying member supports the Endowment. The commitment may be for a future gift to The Rotary Foundation in an estate plan or an outright gift of \$1,000 or more to the Endowment.

Every Rotarian, Every Year Club

For clubs that 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.

Top Three Per Capita in Annual Fund Giving

For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

Naming opportunities

Special opportunities are available to create an endowment or make a directed gift in your name or the name of a loved one. Endowed gifts are invested in perpetuity, with part of their earnings spent on a designated program. Directed gifts are spent in their entirety, usually in the following Rotary year.

Endowed global grant fund

- \$500,000 or more: You can specify up to three of the following: the district sponsor, the area of focus, the general geographic region of the project, or the type of grant activity, such as a project or scholarship.
- \$250,000 or more: You may choose up to two of the options listed above
- \$150,000 or more: You may choose one grant activity type, such as a humanitarian project, scholarship, or vocational training team.

Named endowment

If you donate \$25,000 or more, you can direct the money to one of the following:

- Area of Focus: funds global grants in one area of focus
- World Fund: funds global grants in all areas of focus
- SHARE: supports the World Fund and provides district designated funds to your district
- Rotary Peace Centers: supports Rotary's partnership with leading universities around the world to train professionals in conflict resolution, peace studies, international relations, and related disciplines

Directed gift global grants

- \$150,000: A one-time gift that provides funding for global grants in up to two areas of focus of your choice or to a special initiative of the Foundation, such as WASH in Schools
- \$30,000: A one-time gift that provides your district with funds for one or more global grants in an area of focus of your choice
- \$15,000: A one-time gift that provides funding for a global grant in an area of focus of your choice without specifying the district that will sponsor the grant

Rotary Peace Centers endowment opportunities

- \$1.5 million: Endows a Rotary Peace fellow every year
- \$1 million: Endows a Rotary Peace fellow every two years
- \$1 million: Endows a visiting lecturer every year
- \$750,000: Endows a Rotary Peace fellow every three years
- \$500,000: Endows a Rotary Peace fellow every four years
- \$250,000: Endows one Rotary Peace certificate fellow every year
- \$100,000: Endows an annual seminar at a Rotary Peace Center
- \$25,000 and up: Provides general support

Rotary Peace Centers directed gifts

- \$75,000: Provides funding for a Rotary Peace Fellow to complete a two-year master's degree program
- \$75,000: Provides funding for up to 10 internships or research projects for peace fellows
- \$60,000: Provides funding for five fellows enrolled in the three-month professional development certificate program
- \$10,000: Provides general support

Rotary Peace Symposium directed gifts

- \$400,000-\$500,000: Underwrites the cost of the Peace Symposium
- \$50,000-\$100,000: Provides full funding for a donor-specified element of the peace symposium (speakers, Rotary Peace Fellow travel, etc.)
- \$10,000-\$25,000: Provides funding for a hosted reception connected to the Peace Symposium
- \$10,000 and up: Provides general support for the Peace Symposium

Entrepreneurial named gift for peace

- \$75,000-\$1 million: Funds new opportunities within Rotary's peace programs for global grants and the Rotary Peace Centers, such as workshops and retreats, and other initiatives.

Foundation Awards 2020 Categories by Club Alpha (Year-End June 30, 2019)

Last Update: 11/03/2019

7620 Clubs	Present	Title	Rep	All-Time Giving \$	Year Chartered	Years of Service
Annapolis End Polio Now, #3- PHF (93), #2- PHS (14), #2 Maj D(6)	Yes	President	Carletta Allen	\$ 713,498	2/11/1921	98
Annapolis (Parole) End Polio Now, #3- AF per Giving (\$287.18)	Yes	Past President	David Hillery	\$ 372,599	12/10/1985	34
Bethesda Chevy Chase End Polio Now, #5- PHF (54), #3- Maj D (5), #2- Benef (6)	Yes	Club TRF Chair	Katey Boerner	\$ 698,019	4/12/1933	86
Capitol Hill #3- Bequest (2)	Yes	Club TRF Chair	Roxanne Suratgar	\$ 128,005	11/19/2003	16
Carroll Creek End Polio Now, #2- PHF (109), #1- PHS (16), #1- Maj D (8), #3- Benef (5), #1- Bequest (4)	Yes	Club President	Mike Moore	\$ 940,167	8/6/1993	26
Catonsville EREY TRF Giving				\$ 41,626	5/2/2001	18
Charlotte Hall #1- Per Capita Giving (\$578.95)	Yes	Club Member	Ila Shah	\$ 377,523	6/30/1995	24
College Park #2- Per Capita Giving (\$306.15)	Yes	Past President	Nomie Hamid	\$ 587,522	5/31/1935	84
Columbia EREY TRF Giving, #4 Bequest (2)				\$ 241,090	4/18/1967	52
Columbia Patuxent End Polio Now	Yes	Club President	Linda Sorg-Ostovitz	\$ 299,303	2/18/1986	33

Columbia Town Center	EREY TRF Giving				\$ 100,159	5/27/1982	37
Downtown Silver Spring	<5 years in Charter: #3 Total Giving (\$3,520)	Yes	President	Shannon Babe-Thomas	\$ 3,520	1/15/2016	3
Frederick	End Polio Now, #1- PHF (124), #4- Maj D (5)	Yes	Club Member	Sue Hough	\$ 776,899	10/28/1920	99
Gaithersburg	End Polio Now				\$ 94,766	8/24/1966	53
Glen Bernie	#3- PHS (10)	Yes	Club President	Peter Grayson	\$ 217,822	4/4/1930	89
Greenbelt	EREY TRF Giving				\$ 48,021	5/14/1988	31
Howard West	<5 years in Charter: #1 Total Giving (\$14,010)	Yes	PDG Club Member	Jay Kumar	\$ 14,010	11/4/2014	5
Lake-Shore -Severna Park	End Polio Now	Yes	President	John Clark	\$ 321,700	12/22/1947	72
Lexington Park	End Polio Now, #6- PHF (51)	Yes	President	Regina Faden	\$ 402,950	5/7/1960	59
New Market	<5 years Charter: #2 Total Giving (\$6,000)	Yes	Past President	Jennie Coppit	\$ 6,000	6/19/2019	1
North Bethesda	End Polio Now	Yes	Dist Grants Chair	Barry Thompson	\$ 216,793	3/11/1974	45
Olney	EREY TRF Giving				\$ 87,447	6/18/1951	68
Potomac - Bethesda	EREY TRF Giving				\$ 174,288	8/4/1980	39

Prince Frederick	EREY TRF Giving				\$ 105,518	6/30/1964	55
Smoketowne (Brunswick)	<5 years in Charter: #4 Total Giving (\$920)				\$ 920	11/17/2017	2
Southern Frederick County	#6 Bequest (2)	Yes	Club Member	Gary McKee	\$ 49,194	6/29/2009	10
South Anne Arundel County	End Polio Now	Yes	Club TRF Chair	John May	\$ 120,612	6/30/2005	14
Washington DC	End Polio Now, #4- PHF (73), #1- Benefactor (8), #2- Bequest (3)	Yes	President-Elect	Nancy Riker	\$ 1,143,876	7/12/1912	107
DISTRICT 7620 Total Giving		Since Charter in 1912 of the first Club (Baltimore)			\$ 12,065,220		
Special Recognition: RC of Carroll Creek		Fastest Growing in TRF Total Giving: in just 25 years: Average Giving per Year of \$38,000:		Yes	Mike Moore	\$940,167	

NOTES:

- * End Polio Now: Annually \$1,500 or More per club
- * EREY: Minimum Annual \$100 per cap & \$25 per member

58 Clubs

7620 Clubs

\$ 12,065,220 N/A 47.06

All-Time Giving Chartered Years of Service



FORMS

PUBLICLY TRADED SECURITIES – USA

GIFTS OF STOCK TO THE ROTARY FOUNDATION

Thank you for your interest in making a gift of securities to The Rotary Foundation. For tax purposes, your stock will be valued at the average of the high and low prices on the date of gift - this is the date that the shares are legally transferred to The Rotary Foundation's account at Pershing. **Please inform The Rotary Foundation in advance of your intent to gift securities by completing the attached Notice of Transmittal.**

1. **Complete the Notice of Transmittal of Gift Securities on page 2.** Please fax, email or mail a copy of the completed form to:

Gift Administration
The Rotary Foundation
1560 Sherman Avenue
Evanston, IL 60201 USA
Fax: 847-556-2181
Email: giftadministration@rotary.org

2. **Send the Letter of Intent on page 3 to initiate the electronic transfer with your broker.** Your broker is responsible for initiating the transfer of securities using the information provided on the Letter of Intent. Your broker may have its own form, but the Letter of Intent has the information your broker will need. Once the transfer is complete The Rotary Foundation will issue a charitable tax receipt.

Certificate Transfer or Mutual Funds

If you are interested in making a gift of **mutual funds** or if your stock is in the form of a **physical certificate**, please contact The Rotary Foundation's Gift Administration department as these types of donations may require different processing procedures.

All contributions are tax-deductible to the fullest extent provided by law. Every effort will be made to sell non-marketable securities as quickly as possible. The donor should be aware of possible tax implications. Please contact your tax advisor for complete tax deductibility rules.

Please contact Gift Administration at 847-866-3380 or giftadministration@rotary.org for any questions.



NOTICE OF TRANSMITTAL OF GIFT OF SECURITIES

GIFTS OF STOCK TO THE ROTARY FOUNDATION

My gift is worth approximately \$ _____.

I have notified my broker to wire transfer _____ shares of _____ stock.
Company/Symbol

I have sent a physical certificate via certified mail to Gift Administration/The Rotary Foundation:
 _____ shares of _____ stock on _____, 201____.
Company/Symbol Date

The completed stock power form was sent under separate cover via certified mail.

I would like to speak with someone about giving a stock gift. Please call me at: _____

Please direct my gift to:

<input type="checkbox"/> Annual Fund — SHARE <input type="checkbox"/> Annual Fund — World Fund <input type="checkbox"/> PolioPlus <input type="checkbox"/> Other _____	<input type="checkbox"/> Endowment Fund — SHARE <input type="checkbox"/> Endowment Fund — World Fund <input type="checkbox"/> Rotary Peace Centers <input type="checkbox"/> Endowment Fund – Area of Focus _____
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Name: _____

Address: _____

Phone: _____ Email: _____

Rotary Club: _____ District: _____

Foundation Donor ID # (if known): _____

Please mail, fax, or email this page to:

Gift Administration
 The Rotary Foundation
 1560 Sherman Avenue
 Evanston, IL 60201 USA
 Fax: 847-556-2181
 Email: giftadministration@rotary.org



Publicly Traded Securities Letter of Instruction - USA

DATE: _____

NAME OF YOUR BROKER _____

FIRM/COMPANY _____

ADDRESS _____

CITY, PROVINCE, POSTAL CODE _____

I wish to make a gift of stock to The Rotary Foundation. Please accept this letter authorizing the transfer:

_____ shares **OR** \$ _____
Dollar Amount

Of _____
Name of Stock/Symbol

From my account number # _____ and transfer securities electronically to:

Account Name:	The Rotary Foundation of Rotary International
Broker:	Pershing, LLC
Account Number:	N7M100012
DTC Number:	0443

The Rotary Foundation Tax ID: 36-3245072

Sincerely,

SIGNATURE _____

PRINT NAME _____

ADDRESS _____

CITY, PROVINCE, POSTAL CODE _____

EMAIL ADDRESS _____

PHONE NUMBER _____

In order to initiate your gift transfer, please complete this form with your broker and return a copy to the Rotary Foundation's Gift Administration Department by fax at (847)-556-2181 or by email at giftadministration@rotary.org.

THE ROTARY FOUNDATION MULTIPLE DONOR FORM

Complete this form when submitting a single contribution reflecting the combined gifts of multiple club members. Please do not send cash. Club officers can also make contributions to The Rotary Foundation on behalf of their club or multiple club members at rotary.org/donate.

Data privacy is important to Rotary International and The Rotary Foundation (collectively, "Rotary") and the personal data shared with Rotary will only be used for official Rotary business to support Rotary's core business purposes. Personal data collected on this form is subject to Rotary's Privacy Policy found at my.rotary.org/en/privacy-policy.

Contributions to credit Rotary Club of _____
Club Name Club # District #

1. DESIGNATION/PURPOSE (Check one):

- Annual Fund — SHARE Endowment Fund — World Fund Endowment Fund — Rotary Peace Centers
- PolioPlus Fund Endowment Fund — SHARE Responding to Disasters
- Other _____ Approved Foundation grant _____ (number mandatory)

2. CONTRIBUTION DETAILS

Amount of contribution _____ Currency _____

Credit card contributions can be made at rotary.org/donate.

Check — Payable to "The Rotary Foundation." Check number _____

Wire transfer Date initiated _____ (Please send completed contribution form as soon as possible after initiating a wire transfer.)

3. INDIVIDUAL DONOR DETAILS (Identify and allocate individual contribution amounts.)

Please provide each individual donor's membership ID, name, and personal contribution amount. Membership ID numbers may be obtained from the club secretary and are also listed on the Club Recognition Summary (CRS).

NOTE: Changes to designation can only be requested within 90 days of gift receipt date within current Rotary year.

Membership ID #	Donor Name (as appears on CRS)	Contribution Amount		Membership ID #	Donor Name (as appears on CRS)	Contribution Amount
1.				11.		
2.				12.		
3.				13.		
4.				14.		
5.				15.		
6.				16.		
7.				17.		
8.				18.		
9.				19.		
10.				20.		
Total Amount of Contribution						



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, or contact the Rotary International office that serves your area.

Contributions can be made at 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

CANADA

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

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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
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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

RI JAPAN OFFICE

Rotary International
 Mita Kokusai Building 24F
 Mita 1 Chome 4-28, Minato-ku
 Tokyo 108-0073
 Japan
 Tel: (81-) 03-5439-5800
 Fax (81-) 03-5439-0405
rijapan@rotary.org

RI KOREA OFFICE

Rotary International
 Rm. 705, 70, Gukjegeumyung-ro
 Yeongdeungpo-gu
 Seoul 07333
 Korea
 Tel: (82-2) 783-3077
 Fax: (82-2) 783-3079
rikorea@rotary.org

RI SOUTH ASIA OFFICE

Rotary International
 Pullman/Novotel Commercial
 Tower
 First Floor, Asset No. 2,
 Hospitality District
 Aerocity (Near IGI Airport)
 New Delhi 110037
 India
 Tel: (91-11) 42250101 to 105
 Fax: (91-11) 42250191 or 192
risao@rotary.org

RI SOUTH PACIFIC AND PHILIPPINES OFFICE

Rotary International
 P.O. Box 1415
 Parramatta, NSW 2124
 Australia
 Tel: (61-2) 8894 9800
 Fax: (61-2) 8894 9899
risppo@rotary.org

RI GREAT BRITAIN AND IRELAND (RIBI) OFFICE

Rotary International
 Kinwarton Road
 Alcester
 Warwickshire B49 6PB
 England
 Tel: 01789 765411
 Fax: 01789 764916
rfuk@ribi.org



District & Club Reports

www.myrotary.org



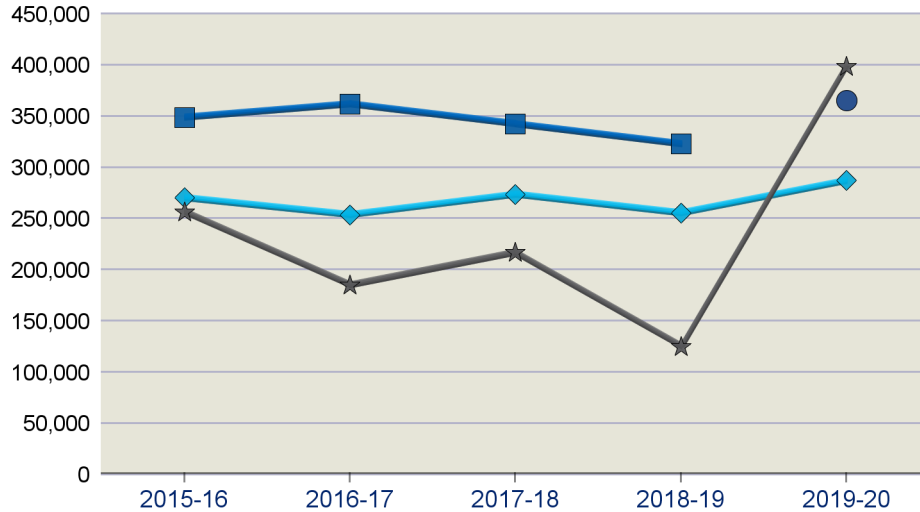
DISTRICT 7620 FUNDRAISING ANALYSIS

INTERIM RESULTS FOR JULY THROUGH MAY 2019-20

	Number of Members	Annual Fund						PolioPlus Fund					Other Funds**	Endowment Fund	Total Giving
		Goal	% Goals Received	Total	Per Capita	Goal Achieved	Non-Giving Clubs	Goal	% Goals Received	Total	Goal Achieved	Non-Giving Clubs	Total	Total	
2019-20	2,131	\$398,525	27.1%	\$287,086	\$134.72	72.0%	11	\$19,160	16.9%	\$83,981	438.3%	24	\$369,557	\$225,843	\$966,467
2018-19	2,181	\$125,150	25.9%	\$322,739	\$147.98	257.9%	1	\$29,336	25.9%	\$81,689	278.5%	21	\$76,165	\$165,509	\$646,102
2017-18	2,164	\$216,950	48.3%	\$342,355	\$158.20	157.8%	1	\$42,244	40.0%	\$87,636	207.5%	23	\$100,750	\$33,822	\$564,563
2016-17	2,279	\$184,900	49.2%	\$361,827	\$158.77	195.7%	1	\$36,750	36.1%	\$118,494	322.4%	20	\$62,618	\$29,623	\$572,563
2015-16	2,299	\$256,770	55.7%	\$348,719	\$151.68	135.8%	1	\$44,350	44.3%	\$93,913	211.8%	10	\$120,987	\$12,505	\$576,124

**Other Funds include term/directed gifts and funds for approved grants.

Annual Fund Measures



Year to Date (YTD) covers the period from July through May.

Recognition and Endowment Measures

	PHF	Bene-factor	Bequest Society*	Major Donor*	Major Gifts	EREY Eligible	Sustaining Member	PHS Eligible
All-time	6,155	179	45	144	--	--	--	--
2019-20	212	2	1	11	9	804	679	109
2018-19	340	2	1	6	8	938	837	134
2017-18	340	4	3	16	4	1,059	906	153
2016-17	315	4	2	18	8	1,129	951	150
2015-16	340	4	2	10	5	1,198	970	150

Yearly breakdowns include both new qualifiers and recognition level changes

Paul Harris Society Members: 153 **Rotary Direct Participants: 99**

Total Endowed Funds: 5 * Joint Major Donor/Bequest Society counts as one.

Market Value: \$4,896,524

Market Value Date: 31-Mar-2020

Foundation Recognition Points: 9,092.64 EREY (USD 25 starting in 2016-17), Sustaining Member, and PHS Eligible includes all individuals, not just active club members.

Recognition/Reports:

Rotary Support Center

(866) 9-ROTARY or (866) 976-8279

RotarySupportCenter@rotary.org

This is Rotary



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