



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.

The Rotary Foundation provides your club the opportunity to participate in and contribute to programs that make a difference in the lives of people around the globe. Participation in Rotary Foundation activities can help attract and retain members. When Rotarians directly experience Foundation programs, they can be inspired to contribute to The Rotary Foundation. Foundation programs are supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world.

Club presidents, secretaries, treasurers, and Rotary Foundation committee chairs can review their club's Foundation contributions in Member Access at [www.rotary.org](http://www.rotary.org).

## **Responsibilities**

As president-elect, you have the following Rotary Foundation responsibilities:

- Appointing and meeting with your club Rotary Foundation committee
- Reviewing your club's current involvement with Foundation programs, using the *Planning Guide for Effective Rotary Clubs* (copies in Tabs 4 & 5 of PETS Manual)
- Reviewing your club's financial contributions to The Rotary Foundation, using Member Access at [www.rotary.org](http://www.rotary.org)
- Setting your club's financial contribution and program participation goals for your year, using the *Planning Guide for Effective Rotary Clubs* and The Rotary Foundation Fund Development Club Goal Report Form (distributed at PETS and at [www.rotary.org](http://www.rotary.org))
- Knowing the resources available to help your club support The Rotary Foundation

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As club president, your leadership will be particularly important to ensuring steady progress is made toward Foundation goals. Use the following strategies to encourage club members to support club goals:

- Conduct inspirational Rotary Foundation-focused weekly club programs four times a year, or at least twice a year.
- Contact your district Rotary Foundation committee chair to find alumni or volunteers to relate their experiences with The Rotary Foundation.
- Encourage club members to get involved in Rotary Foundation's humanitarian grants and educational programs.
- Ask club members to contribute to the Foundation, giving extra attention to members who have never given.
- Provide club-wide recognition and special thanks for contributions and involvement in Foundation programs, especially for Paul Harris Fellows and Foundation Benefactors (and higher level gifts)
- Ensure proper stewardship of Foundation grant funds.

Plan weekly meetings and activities in observance of Rotary Foundation Month (November), World Understanding Month (February), and Literacy Month (March).

You'll find more information on the club Rotary Foundation committee in the *Club Rotary Foundation Committee Manual*.

## Rotary Foundation Committee

The club-level committee structure for The Rotary Foundation should be determined by the Foundation goals your club sets. For example, if your plans include applying for a humanitarian grant, your club may want to have a grants subcommittee.

When appointing your Rotary Foundation committee, choose Rotarians with excellent communication skills, international experience, and community or international volunteer experience. Former program participants are also good candidates.

The Rotary Foundation committee should develop and carry out plans to support the Foundation through financial contributions and club participation in Foundation programs. Include the Foundation committee as one of the five standing committees of your club. Your club may amend its bylaws to reflect the specific responsibilities of this committee, adding subcommittees as needed.

- Your Rotary Foundation committee has the following responsibilities:
- Achieving club Foundation goals for the coming year
- Educating club members about the Foundation

- Encouraging club members to participate in Foundation programs and support the Foundation financially
- Communicating the Foundation goals of the district and the Trustees of The Rotary Foundation to club members
- Ensuring proper stewardship of Foundation grant funds

## District Support for The Rotary Foundation

Members of the district Rotary Foundation committee can provide guidance about The Rotary Foundation and put your club in contact with other Rotary clubs working on similar projects. Contact your district Rotary Foundation chair with questions about The Rotary Foundation.

Information about the various ways your club can participate in the programs of The Rotary Foundation can be found in *The Rotary Foundation Quick Reference Guide*.

## District Rotary Foundation Seminar

The purpose of the district Rotary Foundation seminar is to reach every Rotarian with The Rotary Foundation's message of achieving world understanding and peace. Club presidents, club directors/board members, Foundation committee members, and other interested Rotarians are encouraged to attend to learn more about the Rotary Foundation., the heart and soul of Rotary.

## Programs of The Rotary Foundation

The Rotary Foundation has three main program areas:

- PolioPlus
- Educational Programs
- Humanitarian Grants

### PolioPlus

The goal of PolioPlus is the global certification of polio eradication. It is important for Rotarians in your club to stay informed and involved until certification is achieved.

More than one million Rotarians worldwide have contributed over US\$800 million to PolioPlus. In addition, Rotarians serve as a powerful volunteer network at the local level providing support at clinics and mobilizing their communities for immunization or other polio eradication activities. The PolioPlus program allows Rotary clubs, district, and individual Rotarians to voluntarily assist in reaching Rotary's goal of a polio-free world.

***Recognizing Rotary's resolve to eradicate polio and its extensive volunteer network, the Bill & Melinda Gates Foundation awarded The Rotary Foundation grants totaling US\$355 million. In return, Rotary is committed to raising \$200 million by 30 June 2012. Together, Rotary International and the Gates Foundation will provide over half a billion dollars toward our goal of a polio-free world.***

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Your club can help ensure that the goal of global polio eradication is achieved by conducting the following activities:

- Working with local health officials to maintain high rates of immunization for polio and other diseases
- Contributing to PolioPlus, which will help fulfill Rotary's US\$200 Million Challenge
- Holding a club fundraiser to support Rotary's US\$200 Million Challenge
- Devoting a weekly club program to the topic of polio eradication
- Ensuring club members remain informed and involved until the world is certified polio-free

## Educational Programs

Through its educational programs, The Rotary Foundation furthers international understanding by providing opportunities for students, educators, and business and professional people to experience another culture and develop long-lasting relationships with peers in other countries. Educational programs help participants learn about the needs of their local and world communities and the opportunities available through Rotary to help address them. The educational programs include:

- Ambassadorial Scholarships
- Rotary Grants for University Teachers\*
- Group Study Exchange (GSE)
- Rotary World Peace Fellowships

For a description of these programs, see Worksheet 17 that follows this PETS section.

Rotarians are involved in the selection, orientation, and hosting of educational program participants. Your club can get involved with educational programs in a variety of ways:

- Invite current and past scholars, Rotary World Peace Fellows, and Group Study Exchange team members to share their experiences with your club. These participants typically offer your club excellent program content.
- Nominate Ambassadorial Scholars, Rotary World Peace Fellows, Rotary Grants for University Teachers recipients, or GSE team members.
- Publicize the exchange opportunity.
- Serve as host and sponsor counselors to program participants.

## Humanitarian Grants

The Humanitarian Grants Program provides grants to Rotary clubs and districts to implement humanitarian projects. The following grants are available to address different service needs and funding options:

- Matching Grants
- District Simplified Grants
- Health, Hunger and Humanity (3-H) Grants\*
- Volunteer Service Grants\*

For a description of the Humanitarian Grants Program, see Worksheet 17

*\*These programs will be available for the last time in 2010-11.*

Specific eligibility criteria and application forms for each humanitarian grant and educational program are available through the *RI Catalog*, at [www.rotary.org](http://www.rotary.org), or from your district Rotary Foundation committee.

The Trustees of The Rotary Foundation have established the following standards to guide the program:

- Grants should address humanitarian needs with the aim of providing sustainable development.
- All Rotary Foundation grants require the active participation of Rotarians.
- Grants should assist in the development of stronger Rotary networks.
- All grants must display a commitment to stewardship of funds.

As club president, you are responsible for club activities funded by the Foundation. Work with your club Rotary Foundation committee, district Rotary Foundation committee, and district grants subcommittee to ensure your club regularly reports how Foundation funds for projects are used.

## Foundation Alumni

More than **110,000 people** have received program awards from The Rotary Foundation since 1947. It is important to maintain contact with former Foundation program participants in your area because they are powerful advocates for The Rotary Foundation and are potential donors. Alumni can also help your club by:

- Connecting Rotary clubs from different countries for service projects and fellowship
- Sharing with club members and the media how their experience in the Rotary Foundation program changed their life
- Promoting program opportunities to their peers

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- Advising on selection, orientation, and hosting programs

Contact the Rotary Foundation alumni coordinator or the district Foundation Committee chair for your district/region to find out how you can integrate Foundation alumni into club activities.

## Financial Support for Foundation Programs

Rotary Foundation programs are funded by voluntary contributions from Rotarians worldwide. When Rotarians see the extraordinary results of education, cultural exchanges, and humanitarian projects, they understand why supporting The Rotary Foundation financially is vital to making the world a better place. Contributions sent to the Foundation can be directed to the Annual Programs Fund, the Permanent Fund, or the PolioPlus Fund.

As president-elect, you will submit The Rotary Foundation Fund Development Club Goal Report Form, which you'll receive at PETS.

## Annual Programs Fund — For Support Today

The Annual Programs Fund is the primary source of support for Rotary Foundation programs. Money from the Annual Programs Fund is spent every year on Foundation programs, such as Group Study Exchange, Ambassadorial Scholars, District Simplified Grants, and Matching Grants. Rotarians are encouraged to make financial contributions to The Rotary Foundation annually. The **Every Rotarian, Every Year** initiative, designed to encourage worldwide annual per capita giving of \$100 or more, supports vital Foundation programs. To support the **Every Rotarian, Every Year** effort, you should:

- Make your gift to the Foundation early in the Rotary year.
- Encourage and ask every club member to make a gift every year.
- Inform members of how their contributions to the Annual Programs Fund support Foundation programs that achieve good in the world.
- Recognize Rotarians who support The Rotary Foundation.

## Permanent Fund — To Secure Tomorrow

The Permanent Fund is Rotary's endowment. The principal is never spent, and a portion of the earnings is directed toward Foundation programs. Donations to the Permanent Fund can be outright gifts, securities, bequests, or life-income agreements. Many Rotarians direct substantial gifts to the Permanent Fund. If you know of a club member who has the capacity to make a large gift to The Rotary Foundation, please contact the regional Rotary Foundation coordinator serving your area.

Search [www.rotary.org](http://www.rotary.org) to find the regional Rotary Foundation coordinator serving your area.

## **PolioPlus Fund**

The PolioPlus Fund helps pay for Rotary's efforts to eradicate polio including National Immunization Days and surveillance activities. Donations to the PolioPlus Fund help to fulfill Rotary's US\$200 Million Challenge. Clubs are encouraged to hold special community fundraising events to meet their part of the challenge. Rotary districts may also direct District Designated Fund allocations to Rotary's US\$200 Million Challenge.

## ***SHARE* and the District Designated Fund**

Through the *SHARE* system, contributions to The Rotary Foundation are transformed into Ambassadorial Scholarships, Matching Grants, Group Study Exchanges, and other Foundation programs, awards and activities. Through *SHARE*, the Foundation Trustees involve Rotarians worldwide in the decision-making process for funding Foundation programs. No other foundation gives its donors the freedom to decide how contributions are spent.

At the end of every Rotary year, contributions to the Annual Programs Fund from all of the Rotary clubs in a district are divided into two funds:

- 50 percent credited to the World Fund
- 50 percent credited to the District Designated Fund (DDF)

The Foundation uses the World Fund portion to pay for the worldwide programs available to all Rotary districts, such as Group Study Exchange, Matching Grants, and 3-H Grants. Your district uses the DDF portion to fund the Foundation programs of its choice.

The Rotary Foundation's unique funding cycle uses contributions for programs three years after they are received. The three-year cycle gives districts time to plan programs and select participants and allows the Foundation to invest the contributions. The earnings from those investments pay for general administration and fund development expenses.

Your district Rotary Foundation committee is responsible for deciding how to use the district's available District Designated Fund, in consultation with the clubs in your district. Contact your district Rotary Foundation committee chair to learn how the district plans to use its available District Designated Fund.

## **Stewardship**

All grants must display a commitment to stewardship of funds, which reflects The Four-Way Test and responsible fiscal oversight. Stewardship includes:

- Detailed project planning
- Submitting complete and accurate applications with documentation
- Direct Rotarian involvement in the implementation of the project
- Transparency in all financial transactions
- Reporting in an efficient and effective manner

For more information about financial management best practices, refer to appendix \_\_\_\_\_

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## Contribution Recognition

The sincere acknowledgement of a donor's gift is the first step toward additional financial support. The Rotary Foundation presents recognition to donors in appreciation of financial contributions or commitments for future contributions.

### *Recognition for Individuals*

- Rotary Foundation Sustaining Member
- Paul Harris Fellow Recognition
- Multiple Paul Harris Fellow
- Memorial Paul Harris Fellow
- Memorial Paul Harris Certificate
- Major Donor
- Arch C. Klumph Society
- Benefactor
- Annual Programs Fund recognition banner
- The Rotary Foundation Bequest Society
- Certificate of Appreciation (also available to corporations)

### *Recognition for Clubs*

- 100% Rotary Foundation Sustaining Member club banner (awarded annually)
- Every Rotarian, Every Year banner (awarded annually)
- Top Three Annual Programs Fund Per Capita Club banner (per district; awarded annually)
- 100% Paul Harris Fellow Club banner (upon request)

For additional details on Rotary Foundation recognition, see the *Donor Recognition Booklet*.

## Future Vision Plan

The Rotary Foundation Trustees adopted the Future Vision Plan, a forward-looking, strategic approach to fulfilling the Foundation's mission that will continue its transformation and advancement. Based on input from a wide variety of Rotarians, the Foundation Trustees developed the Future Vision Plan, which is designed to

- Simplify Foundation programs and processes consistent with the mission
- Focus Rotarian service efforts where they will have the greatest impact by addressing major world needs that are relevant to Rotarians
- Offer program options to help achieve both global and local goals

- Increase the sense of ownership at the district and club levels by transferring more decisions to the districts

## Grants Structure

Under the new grants structure, the Foundation will provide two types of grants:

- **Rotary Foundation District Grants** – Block grants made to districts to support smaller projects, both locally and internationally. Districts may use up to 50 percent of their available District Designated Fund (DDF) for these grants in a given Rotary year and administers the grant without the Foundation’s involvement.
- **Rotary Foundation Global Grants** – Grants that support larger projects with sustainable, high-impact outcomes in one of the six areas of focus:
  - Peace and conflict prevention/resolution
  - Disease prevention and treatment
  - Water and sanitation
  - Maternal and child health
  - Basic education and literacy
  - Economic and community development

Clubs and districts can either create their own global grant projects in the areas of focus or sponsor packaged grants developed by The Rotary Foundation in conjunction with its strategic partners.

Club- and district-developed global grant projects are funded by the sponsors and a matching World Fund award. Packaged global grants are developed by the Foundation and its strategic partners. The World Fund and the strategic partner provide 100 percent of the funding, and Rotarians implement the grant project.

## Strategic partnerships

The Rotary Foundation will form strategic partnerships with organizations that specialize in one of the strategic areas of focus. These organizations would provide financial support, technical expertise, and advocacy efforts for projects and activities that are designed jointly with the Foundation and include Rotarian participation.

## Implementation

The Future Vision Plan will be implemented in stages until its full implementation in 2013-14. Selected representative districts will participate in the Future Vision Pilot program that will run 2010-13. This pilot will have the following timeline:

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- **2010-11: Begin awarding grants to pilot districts. Approximately 100 districts will participate in the three-year pilot.**
- **2011-12: Continue awarding grants to pilot districts. Begin to phase out current Foundation programs**
- **2012-13: Continue awarding grants to pilot districts. Begin to adjust the grant model based on pilot district's feedback. Qualify and train all districts.**
- **2013-14: Begin awarding new grants worldwide and phase out remaining Foundation programs.**

For questions about the Future Vision Plan, e-mail [newgrantspilot@rotary.org](mailto:newgrantspilot@rotary.org) or go to [www.rotary.org/futurevision](http://www.rotary.org/futurevision).

## Resources

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the *Official Directory* and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org), [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org), or your international office.

The following resources are available to help your club achieve its Foundation goals:

***The Rotary Foundation Quick Reference Guide (219-EN)*** — Detailed overview of the programs and services of The Rotary Foundation.

## Human Resources

- District Rotary Foundation committee — Responsible for overseeing all Rotary Foundation activity in your district.
- PolioPlus committees — Serve as international, regional, national, and local advisers on Rotary's participation in the polio eradication effort.
- Regional Rotary Foundation coordinators (RRFCs) — Rotarians appointed to help districts and clubs in all aspects of The Rotary Foundation.
  - Assistant regional Rotary Foundation coordinators — Assist the regional Rotary Foundation coordinators, districts, and clubs with their annual giving, major gifts, and program participation.
  - Rotary Foundation alumni coordinators (RFACs) — Assist RRFCs, club, and districts in reconnecting with Foundation program alumni and involving alumni in Rotary Foundation activities.
  - Zone challenge coordinators — Assist the RRFCs, districts, and club in fundraising in support of PolioPlus Fund and fulfilling Rotary's US\$200 Million Challenge
- Rotary Foundation staff at RI World Headquarters or your international office — Staff members dedicated to supporting Rotarians, clubs, and district involved in Rotary Foundation programs and fund development.

- The Rotary Foundation Contact Center — Foundation staff available to answer questions about The Rotary Foundation at e-mail [contact.center@rotary.org](mailto:contact.center@rotary.org) or, in North America only, at **1-866-976-8279 (toll-free)**.

## Informational Resources

- Club Rotary Foundation Committee Manual (226E-EN) — Overview of the committee's role and responsibilities as well as available resources.
- Donor Recognition Booklet (189-MU) — Multilanguage booklet detailing all available forms of Foundation donor recognition.
- End Polio Now— A bimonthly newsletter that provides an update on the global status of polio eradication and Rotary's US\$200 Million Challenge fundraising efforts
- Every Rotarian, Every Year Club Success Kit (958-EN) — Brochures, stickers, and instructions to help Rotary clubs promote program participation and contributions to the Annual Programs Fund.
- Gift Acceptance Policy Manual (Web only) — Overview of the types of gifts accepted by The Rotary Foundation, including gifts to the Permanent Fund.
- The Rotary Foundation section of the Planning Guide for Effective Rotary Clubs — Club assessment and goal-setting tool used to plan the club's Rotary Foundation goals.
- PolioPlus Brochure (323-EN) — Update on the global polio eradication effort, including recent developments and statistics, and a description of the contributions of Rotary and its major partners and the challenges remaining to achieve a polio-free world.
- Rotary's US\$200 Million Challenge Brochure (986-EN) — Informs Rotarians and non-Rotarian supporters about Rotary's commitment to eradicate polio and encourages support for Rotary's fundraising challenge.
- Rotary Foundation Facts (159-EN) — Pocket-size leaflet with recent Foundation statistics.
- Rotary International and Rotary Foundation Annual Reports (187-EN) — Year-end financial figures and notable program achievements.
- [www.rotary.org](http://www.rotary.org) — **The Rotary Foundation** section of running a club includes information such as the Rotary Foundation's annual report, Foundation goals, and program information.

## Financial Resources

- Funds from individual donors or local businesses
- Rotary Foundation grants