

# Foundation I: Our Foundation



I am “doing good” in my local community and around the world

## Session Goals

Understand the Basic Goals, Programs & Financing of our Rotary Foundation

Discuss the Importance & Value of our Rotary Foundation to your Club

Need for each Rotarian to make TRF their charity of choice

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

## Materials

- ◆ □ OF-1: Exemplary Global Grant Projects
- ◆ □ OF-2: Areas of Focus
- ◆ □ OF-3: Foundation Facts—Giving 159-EN (1113), Graphics <http://www.rotary.org/en/document/12436>
- ◆ OF-4: Charity Navigator Rating
- ◆ OF-5: Donor Recognition Page <https://www.rotary.org/en/donate/recognition>
- OF-6: Rotary Direct commitment form <https://my.rotary.org/en/document/rotary-direct-rotarys-recurring-giving-program-form>
- □ Rotary Foundation Reference Guide 219-EN (1012) <http://www.rotary.org/en/document/518>
- □ Connect for Good (formerly Rotary Basics) <https://www.rotary.org/myrotary/en/document/connect-good>
- Rotary Learning Center
- ◆ attached insert      ● online      □ article

*How do clubs benefit from it and thereby lead into how does it then benefit the “world”, etc.*

While this course and others within RLI discuss Rotary Foundation topics, you should consult your district for specific Rotary Foundation training.

## Session Topics

- 1) How many of you have held roles in your club or in the District involving The Rotary Foundation? What role(s) have you had?
- 2) What is The Rotary Foundation and what does it do? How does it help you do good in the world?

- 3) Let's consider how The Rotary Foundation can be involved in the projects that we carry out in our clubs and districts?

**Engage the attendees in one of the following exercises:**

**Exercise #1: Distribute sticky note pads to attendees and ask all participants to write on the sticky notes one or two service projects in which their clubs have participated. Draw a large cooking pot on the easel pad with "flames" drawn underneath and ask each participant to place the sticky notes on the pot, announcing to the class what the project is. After all participants have added sticky notes, pull sticky notes off at random, ask the question in #4 below about the various projects, and discuss funding, etc.**

**Alternate Exercise #2: Divide participants into groups of four and assign one of the Rotary Stories at Inserts OF-1-A to OF-1-D to each group. Allow 10 minutes for them to answer the three questions at the bottom of each story: Why engage this project? Why now? and Why Rotary? Ask participants to report out with responses and discuss. Then allow the groups an additional 2–3 minutes to condense their responses into one sentence and report to the entire group. Suggest the facilitator write their responses on the easel pad—this allows the facilitator to choose the most instructive words.**

**Discuss the responses.**

- 4) What was the role of the Rotary Foundation in these projects?

**Funding provided through Global Grants, District Grants, perhaps no TRF funding at all. If not, ask why not? Note that Global and District Grants will be discussed in more depth in Part II.**

- 5) How do Rotary's Areas of Focus influence the financing of these many different projects? Must all projects meet the requirements of the Areas of Focus?

**The Areas of Focus describe the programs and projects for which Global Grants can be used. All Global Grant projects must be determined to be sustainable for the indefinite future and must be supported with the community needs assessment demonstrating that the project is necessary. Global Grants must be at least \$30,000. District Grants cost less than \$30,000 and not required to demonstrate sustainability or fall within the Areas of Focus**

- 6) How can you and your club contribute to and raise funds for our Rotary Foundation?

**Donations can be made by individuals (check or direct withdrawal), clubs, districts, corporations, other foundations, non-governmental organizations, governments, or fundraising from the general public. Note that Rotary Direct is a highly convenient way to contribute regularly/periodically to the Foundation. Refer to the Rotary Direct contribution form insert.**

- 7) When you give money to our Rotary Foundation, can you designate where the funds go and for what purpose?  
**Yes.**

What are the options and how do they work?

**Funds can be given to The Annual Fund (analogize to a checking account, spent annually), The Endowment Fund (analogize to a savings account, held as a traditional endowment where the interest-only is spent and the principal remains), or designated to funds supporting specific initiatives, such as Polio Eradication, Peace Scholars, or specific grants. See also OF-3: Foundation Facts – Giving.**

- 8) What incentives does our Foundation offer to enhance giving? **Recognitions for Rotarians, family and others, such as Paul Harris Fellow, Major Donor, Benefactor, Bequest Society; the use of points to creatively create recognitions; the ability to use cash or prior giving (DDF) donations to support projects; and district policies that bring back certain funds for local or community projects.**

- A. More details on the programs of our Foundation can be read about in Insert OF-2 and at Rotary.org.**
- B. You can learn more about the Rotary Grant Model by attending RLI Part II in the session “Targeted Service” and learn more about district-related information at one of your district’s Grants Seminars.**

9) What is meant by “EREY”? ***Every Rotarian, Every Year. It is a campaign to involve every Rotarian in the funding and activities of The Rotary Foundation at least one time per year. Rotary Foundation individual recognitions encourage giving by individuals at specific benchmarks, such as “EREY” for any amount annually, per Rotarian, per year, “Sustaining Member” or “Sustainer” at US\$100 per Rotarian, per year, and Paul Harris Society at US\$1000 per Rotarian, per year. Rotary Foundation club recognitions encourage giving by all individuals in a club, such as “100% EREY Club” recognizing all members of a club contributing some amount, and “100% Sustaining Member Club” at US\$100 per Rotarian, per year. District and Clubs often create their own recognitions and incentives to promote involvement. Faculty can use the chart below to emphasize particular types of giving and recognition, or to create an appropriate exercise.***

<b>TRF Giving &amp; Recognition</b>	<b>Annual Fund</b>	<b>Endowment Fund</b>
“Every Rotarian, Every Year” or “EREY” recognizes clubs that achieve an average of \$100 USD per capita giving and every dues-paying member personally contributes at least \$25 USD to the Annual Fund during the year	“Annual Fund” is TRF’s “checking account”, to be spent on programs in the third year after funds are received	“Endowment Fund” is TRF’s “savings account”, formerly the “Permanent Fund”
	“Sustaining Member” or “Sustainer” recognizes a cumulative \$100 USD gift each year to the Annual Fund	“Benefactor” recognizes a cumulative \$1,000 USD gift or pledge to the Endowment Fund
“100% Paul Harris Fellow Club” is when all dues-paying club members attain PHF status	“Paul Harris Fellow” or “PHF” recognizes a cumulative \$1,000 USD gift to the Annual Fund, Polio Plus, or an approved Foundation grant	“Bequest Society” recognizes a cumulative \$10,000 USD gift or pledge to the Endowment Fund
“100% Paul Harris Society Club” is when every dues-paying club member contributes a minimum of \$1,000 USD to the Annual Fund, Polio Plus, or an approved Foundation grant	“Paul Harris Society” recognizes a cumulative \$1,000 USD gift each year to the Annual Fund, Polio Plus, or an approved Foundation grant	“Major Donor” recognizes a cumulative \$10,000 USD gift to TRF
No portion of your Rotary dues is required to go to TRF. All contributions are voluntary.	“Polio Plus” is the program to receive funds given to TRF for the worldwide campaign to eradicate polio	“Arch Klumph Society” recognizes a cumulative \$250,000 USD gift to TRF

10) Why is the Rotary Foundation separate from Rotary International?  
***Specific “charitable purposes”, favorable tax status in many countries for givers and administration, contains different supervision and management structures than a standard business.***

11) What are the benefits to Rotary, if any, to having a Rotary Foundation? ***Refer to Fourth Object of Rotary***

***Suggestion to group leaders: You may use stories other than the stories in the inserts for the Alternate Exercise. Additional stories can be found in Rotary Showcase on the Rotary Website. Inform attendees that Rotary Showcase is a good resource for additional stories of this type.***



## Exemplary Global Grant Projects

Global Grants that exemplify what a project should be: a sustainable endeavour that aligns with one of Rotary's areas of focus and that is designed in cooperation with the community to address a real need. These noteworthy projects demonstrate how your club can leverage the resources of the Foundation to do good in the world.

### 1. Equipping a neonatal intensive care unit in Brazil

**Area of focus:** Saving mothers and children

**Host sponsor:** Rotary Club of Registro, Brazil

**International sponsor:** Rotary Club of Nakatsugawa, Japan

**Total budget:** \$172,500

**Background:** Neonatal mortality rates were significantly higher in the Ribeira Valley area of southern São Paulo state than in other regions.

**Scope:** The Rotarians worked with the Hospital Regional Dr. Leopoldo Bevilacqua in Pariquera-Açu to determine the best approach. The grant provided equipment for the hospital's neonatal ICU and provided prenatal care and breast-feeding workshops for pregnant adolescents.

**Impact:** Infant mortality in the region has been halved to seven per 1,000 live births.

### 2. Supporting Rotary Family Health Days in Uganda

**Area of focus:** Saving mothers and children

**Host sponsor:** Rotary Club of Kiwatule, Uganda

**International sponsor:** District 5500 (Arizona, USA)

**Total budget:** \$97,750

**Background:** A health care summit in Uganda, funded by a district grant, uncovered a need for improved prenatal diagnostic capabilities in rural communities and for better nutrition for expectant mothers.

**Scope:** A combination global grant provided humanitarian supplies for Uganda's Rotary Family Health Days and a vocational training team for health care workers at the health camps.

**Impact:** The team trained 23 nurses, midwives, and other health care practitioners to use ultrasound scanning devices to diagnose abnormalities in pregnancies and other life-threatening conditions.

**Fun fact:** Ten Rotary clubs in Uganda each adopted a rural health care center.

### 3. Collecting donated human milk for new born in the Philippines

**Area of focus:** Saving mothers and children

**Host sponsor:** Rotary Club of Chinatown-Manila, Philippines

**International sponsor:** Rotary Club of Tomobe, Japan

**Total budget:** \$82,000

**Background:** The Rotarians conducted a community needs assessment and decided to fund the creation of a human milk bank at a hospital in Manila.

**Scope:** The facility collects, screens, processes, and distributes milk to premature and sick newborns, and to well babies whose mothers cannot provide their own breast milk, at Justice Jose Abad Santos General Hospital. It will also supply milk to infants in communities affected by natural disasters throughout the country.

### 4. Training young community leaders in Guatemala

**Area of focus:** Promoting peace

**Host sponsor:** Rotary Club of Valle de Guatemala, Guatemala

**International sponsor:** Rotary Club of Manhattan Beach, California, USA

**Total budget:** \$39,873

**Background:** Students attending overcrowded schools in poverty-stricken areas of Guatemala face bullying and street violence. Crimes stemming from gang and drug activity are common.

**Scope:** Project sponsors worked with Alianza Joven, a Guatemalan organization focused on preventing crime and violence, to train students in four municipalities around Guatemala City on techniques for deflecting aggressiveness, strengthening leadership, making decisions, and serving their communities. Teachers, principals, and parents were involved.

**Impact:** More than 6,500 teachers and students received training.

**Fun fact:** The project sponsors connected at a project fair in Antigua, Guatemala.

### 5. Teaching peaceful problem-solving in Israel

**Area of focus:** Promoting peace

**Host sponsor:** Rotary Club of Haifa, Israel

**International sponsor:** Rotary Club of Coral Springs-Parkland, Florida, USA

**Total budget:** \$161,750

**Background:** Israel faces challenges with water scarcity and ongoing conflict.

**Scope:** This water project has a “hidden” peace component: Water challenges form the basis of a science curriculum that helps schoolchildren from different backgrounds in Haifa find solutions peacefully and creatively.

**Impact:** Students from 10 schools worked together to present 38 science projects focused on water and sanitation. One project involving students from three schools won first prize in a national competition. Schools also participated in 15 cross-cultural activities.

### 6. Bringing clean water to public schools in Lebanon

**Area of focus:** Providing clean water

**Host sponsor:** Rotary Club of Baabda, Lebanon

**International sponsor:** Rotary Club of Kernersville, North Carolina, USA

**Total budget:** \$43,550

**Background:** Municipal water supplies in Lebanon are often tainted because of deteriorating infrastructure, so most people buy bottled water for drinking. Many public schools collect rainwater in rusty tanks, leading to contamination, illness, and missed school days. The influx of refugees from Syria has made schools even more crowded and created an even greater need for clean water.

**Scope:** This grant supplied new water tanks, pipes, filters, and faucets to 19 schools; it also provided hygiene training.

**Impact:** Now, 6,743 children have access to clean water and the project is being replicated throughout the country. Rotarians in Lebanon aim to bring clean water to every public school – totaling more than 1,000.

## 7. Providing safe water for rural communities in Peru

**Area of focus:** Providing clean water

**Host sponsor:** Rotary Club of Cajamarca Layzón, Peru

**International sponsor:** District 2201 (Spain)

**Total budget:** \$258,195

**Background:** Before the project, residents drank untreated spring water, and the rate of intestinal and respiratory diseases, especially among infants and the elderly, was high.

**Scope:** The project repaired 32 reservoirs and installed gravity-fed drip chlorination systems for drinking water. The Rotarians also trained residents to administer and maintain the system.

**Impact:** More than 10,000 people, including 1,138 children under age four, now have clean drinking water.

**Fun fact:** The Rotary Club of Cajamarca Layzón has only 11 members; this was its first global grant.

## 8. Improving sanitation and hygiene training in Benin

**Area of focus:** Providing clean water

**Host sponsor:** Rotary Club of Abomey-Calavi, Benin

**International sponsor:** District 2080 (Italy)

**Total budget:** \$158,999

**Background:** The village of Paouignan needed improved clean water infrastructure.

**Scope:** The Rotarians provided a new well and water tower and 10 new taps, repaired seven older taps, and provided hygiene training in Paouignan.

**Impact:** Improved water access and sanitation practices benefited 17,000 people.

**Fun fact:** This grant was part of the Future Vision Pilot. The sponsoring clubs understood the Foundation's desire for sustainable projects and created the hygiene component of the grant before any training documents were available. The grant sponsors communicated in three languages while carrying out this project.

## 9. Bringing basic sanitation to a remote village in Colombia

**Area of focus:** Providing clean water

**Host sponsor:** Rotary Club of Cartagena de Indias, Colombia

**International sponsor:** Rotary Club of Los Angeles, California, USA

**Total budget:** \$38,507

**Background:** Sanitation facilities in the village of Leticia were nonexistent; residents had to relieve themselves outdoors. Environmental contamination and lack of hygiene contributed to illness among people in the village.

**Scope:** The Rotary Community Corps in Leticia proposed a project to provide bathrooms – each including toilet, shower, sink, and septic tank – to 25 of the village’s 75 homes.

University students and Rotarians trained residents in hygiene, food handling, and waste management.

**Fun fact:** A nearby village has asked the Rotarians to organize an RCC there.

**Top tip:** Work with an RCC; talk with clubs that have done a similar project; form strategic alliances with universities, local companies, and government officials; and actively involve local Rotary members.

## 10. Improving literacy in Guatemala

**Area of focus:** Supporting education

**Host sponsor:** Rotary Club of Guatemala Vista Hermosa, Guatemala

**International sponsor:** Rotary Club of Summit County (Frisco), Colorado, USA

**Total budget:** \$339,191

**Background:** The Guatemala Literacy Project is a 20-year partnership between Rotary clubs and districts and the nonprofit Cooperative for Education.

**Scope:** This global grant provided textbooks, computer labs, teacher training, and scholarships to impoverished schools. The sustainable model requires families to pay a fee to rent the donated textbooks; schools use the money to buy new books when the old ones wear out.

**Impact:** This grant served 5,880 students and trained 337 teachers. First-graders in the program scored 71 percent higher than the national average in letter naming.

**Fun fact:** More than 500 Rotary clubs have participated in the Guatemala Literacy Project over the past 20 years.

## 11. Providing equipment for indigenous farmers in Paraguay

**Area of focus:** Growing local economies

**Host sponsor:** Rotary Club of Asunción, Paraguay

**International sponsor:** Rotary Club of Flensburg, Germany

**Total budget:** \$52,500

**Background:** Indigenous residents of the village of El Paraiso, 300 miles north of the capital, Asunción, relied on subsistence farming.

**Scope:** The Rotarians provided agricultural equipment – a tractor, plow, and harrow – and worked with an organization that provides vocational training to the village chiefs and makes regular visits to the village to monitor progress.

**Impact:** Two weeks after the launch of the project, the villagers planted 500 acres of sesame.

## 12. Screening for breast cancer in Turkey

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Adana, Turkey

**International sponsor:** Rotary Club of San Antonio, Texas, USA

**Total budget:** \$38,000

**Background:** In Turkey, breast cancer is the eighth most common cause of death. Early detection is key to effective treatment, but women in rural areas have little access to, or education about, screening.

**Scope:** Working with local officials, Rotarians provided breast models that health workers use to explain the effects of breast cancer and to demonstrate how women can detect signs of the disease. Rotarians and the Public Health Directorate worked together to organize breast cancer awareness events in 15 districts of Adana, a city in southern Turkey.

### 13. Fighting cervical cancer in rural Bangladesh

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Padma Rajshahi, Bangladesh

**International sponsor:** Rotary Club of North Columbus, Georgia, USA

**Total budget:** \$59,500

**Background:** Bangladesh ranks fourth in the world in deaths from cervical cancer.

Prevention and early detection can lead to higher survival rates.

**Scope:** Project sponsors worked with the Rajshahi Cancer Hospital and Research Center to reduce the incidence of cervical cancer through vaccinations. They also worked to raise awareness about symptoms and funded training for female paramedics in 10 villages around Rajshahi.

**Impact:** Nearly 1,000 girls and women ages nine to 45 participated in the program.

**Fun fact:** Response to the program was stronger than anticipated; the Rotarians plan to include more villages in a future project.

### 14. Taking cancer screening on the road in India

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Madras East, India

**International sponsor:** Rotary Club of San Antonio, Texas, USA

**Total budget:** \$70,242

**Background:** India has more than 800,000 new cases of cancer every year; many people, especially in rural areas, are not aware of, cannot afford, or are afraid of screening for the disease. Late diagnosis of breast and cervical cancer leads to high mortality rates.

**Scope:** Rotarians identified a significant public health problem in their area, then found a strong cooperating organization to work with. They helped design a special vehicle to bring screenings to women in rural areas and mobilized their networks to ensure that the mobile unit would reach as many women as possible.

**Impact:** 3,650 women were screened during the project.

**Top tip:** Cooperate with an organization that is already experienced in the work your club plans to focus on.

### 15. Equipping a specialized medical center in New York state

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Burnt Hills-Ballston Lake, N.Y.

**International sponsor:** Rotary Club of Luanshya, Zambia

**Total budget:** \$34,650

**Background:** Children in need of comprehensive services to correct cleft craniofacial abnormalities had to travel several hundred miles to Boston or New York City.



**Scope:** The grant funded specialized equipment, supplies, and educational materials for doctors and families at the Albany Medical Center, which serves an area of 15 million people.

**Fun fact:** This was the New York club and district's first time sponsoring a global grant whose beneficiaries were in the United States.

## 16. Improving health services in Nepal with a VTT

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Patan West, Nepal

**International sponsor:** Rotary Club of Amagasaki West, Japan

**Total budget:** \$33,781

**Background:** Rotarians in District 2680 (Japan-Hyogo) have supported the Dr. Iwamura Memorial Hospital in Bhaktapur, Nepal, since it was established in 1998. Every month, the hospital treats 225 patients for emergency care and 1,300 outpatients. Rotarians saw a need for improved quality of services.

**Scope:** A vocational training team of an administrator and three nurses from the hospital received training on emergency care and dialysis treatment at Okamoto Hospital in Hyogo prefecture.

**Impact:** The training team members observed how Japanese hospitals receive and treat patients, learned best practices for infection management and safety procedures, and gained skills in dialysis treatment and the use of other advanced medical equipment.

## 17. Bridging the health care gap in Mongolia with smartphones

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Khuree, Mongolia

**International sponsor:** Rotary Club of Cheonan-Dosol, Korea

**Total budget:** \$50,000

**Background:** More than 300 villages in Mongolia are so remote that access to advanced health services is limited.

**Scope:** Doctors in 55 villages received smartphones and training in a tele-dermatology system through a user-friendly app.

**Fun fact:** The app was developed in Mongolia.

## 18. Fighting malaria with mosquito nets in Venezuela

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Puerto Ordaz, Venezuela

**International sponsor:** Rotary Club of Key Biscayne, Florida, USA

**Total budget:** \$77,500

**Background:** Venezuela is facing a malaria epidemic, with the eastern city of Sifontes at the epicenter. Rotarians already had relationships with area residents thanks to a previous Matching Grant project.

**Scope:** The project distributed 6,000 insecticide-treated bed nets to indigenous communities around Sifontes and provided instructions on how to use them. Local young people, including

Rotaractors and indigenous representatives, received training on how to perform house-to-house follow-up visits.

**Impact:** New malaria cases have been reduced by 60 to 80 percent. Sponsors hope to build on this success in Venezuela and are working on a similar project in Peru.

**Fun fact:** The project provides custom-made bed nets designed to work with the traditional hammocks used by people in the indigenous communities.

## 19. Mobilizing rural medical care in Mexico

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of San Nicolás de los Garza, Mexico

**International sponsor:** Rotary Club of Austin, Texas, USA

**Total budget:** \$50,000

**Background:** Isolated rural communities lack access to medical care.

**Scope:** Rotarians, through a series of global grants, donated mobile health units with medical and dental supplies to a fleet staffed by partner organization *Cáritas de Monterrey*.

**Impact:** More than 5,000 people now have access to medical care.

**Fun fact:** The Rotary clubs of San Nicolás de los Garza and Austin have been twin clubs for nine years.

## 20. Fighting dengue fever in Indonesia

**Area of focus:** Fighting disease

**Host sponsor:** Rotary Club of Solo Kartini, Indonesia

**International sponsor:** Rotary Club of Westport, Connecticut, USA

**Total budget:** \$70,725

**Background:** Dengue fever is the fastest-spreading tropical disease and a pandemic threat, according to the World Health Organization. An estimated 70 percent of cases occur in Asia.

**Scope:** The project aimed to interrupt the life cycle of the mosquito that carries dengue in parts of Surakarta by eliminating a common breeding site. The sponsors tiled the cement bathtubs that are common in Indonesian homes with white ceramic tiles, which make mosquito larvae more visible, and trained residents to check for the larvae and to empty, scrub, and cover their tubs to prevent infestation. Community social workers followed up weekly.

**Impact:** The Rotarians tiled 3,500 tubs. The government is now interested in taking up the project.

**Fun fact:** This project has been supported by three global grants, including the first one to be approved under The Rotary Foundation's new grant system. The host club's members are all women.

## Insert OF-2: Areas of Focus

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

1. Peace and conflict prevention/resolution
2. Disease prevention and treatment
3. Water and sanitation
4. Maternal and child health
5. Basic education and literacy
6. Economic and community development
7. Supporting the Environment



# Insert OF-3: 2020 Facts

## SUMMARY STATISTICS

Contribution summary	2019-20 unaudited	Cumulative
Annual Fund	\$123.6 million	\$2.9 billion
Endowment Fund	\$39.3 million	\$414.3 million
PolioPlus Fund	\$132.9 million	\$1.8 billion
Other*	\$43.0 million	\$278.3 million
<b>Total outright contributions</b>	<b>\$338.8 million</b>	<b>\$5.4 billion</b>
Total new commitments to the Endowment Fund	\$52.8 million	\$838.3 million
Polio transfers**	\$17.0 million	–
<b>Grand total</b>	<b>\$408.6 million</b>	<b>–</b>
<b>Program awards &amp; operations</b>	<b>\$327.7 million</b>	<b>Since 1947: \$4.9 billion</b>

\* Includes cash contributions to global grants, directed gifts, and the Disaster Response and donor advised funds

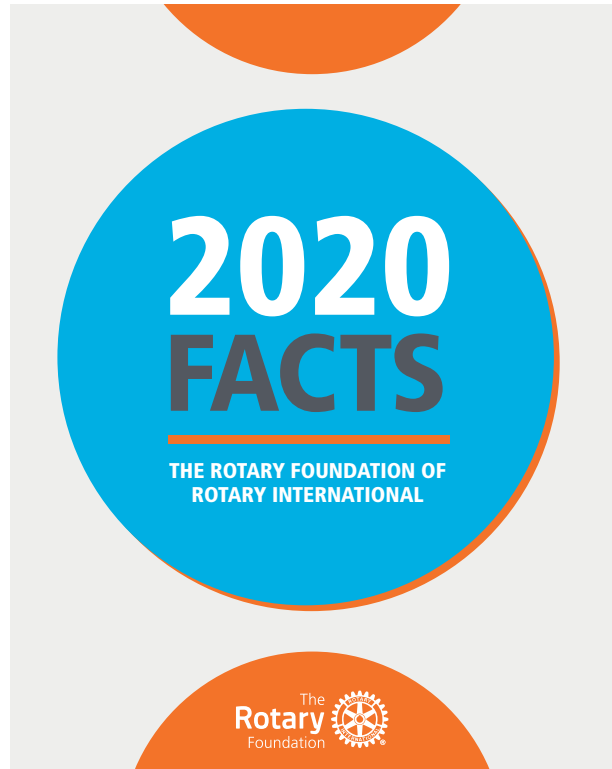
\*\* District Designated Fund transfers and the resulting World Fund match to PolioPlus, affinity card royalties, and donor advised fund transfers to PolioPlus

### For additional information, contact:

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159-EN—(11/20)



# PROGRAMS

(All figures are as of 30 June 2020 and in U.S. dollars.)

## PolioPlus

Since 1988, Rotary and our partners have immunized nearly 3 billion children against polio. As of June 2020, Rotary had committed more than \$2.1 billion to global polio eradication, seeking to eliminate the wild poliovirus in the last two countries where it remains endemic and to ensure that it does not return elsewhere. **In 2019-20, program awards, including PolioPlus Partners grants, totaled \$151.8 million.**

## Rotary Peace Centers

Each year, the Foundation supports the training of peace fellows at six Rotary Peace Centers, where they earn master's degrees or professional development certificates. Since 2002-03, 1,370 fellows from more than 110 countries have participated. **In 2019-20, 69 fellows from 35 countries began their studies at the Rotary Peace Centers, and program awards for the fellows and centers totaled \$4.5 million.**

## District grants

District grants support small-scale, short-term projects related to the Foundation's mission. **In 2019-20, the Foundation approved 490 district grants, and program awards totaled \$33.6 million.**

## Global grants

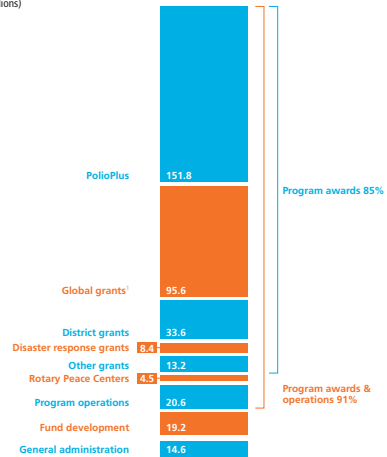
Global grants fund large-scale international activities with sustainable, measurable results that support Rotary's areas of focus. Activities include humanitarian projects, scholarships, and vocational training teams. **In 2019-20, the Foundation approved 1,359 global grants, and program awards totaled \$95.6 million.**

## Disaster response grants

Rotary's disaster response grants support relief and recovery efforts in areas that have been affected by natural disasters within the past six months. **In 2019-20, the Foundation approved 339 disaster response grants, and program awards totaled \$8.4 million.**

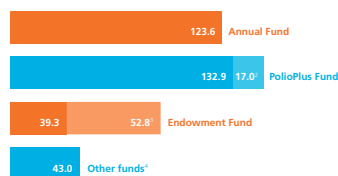
## 2019-20 TOTAL EXPENDITURES: \$362 million

(in millions)



## 2019-20 TOTAL CONTRIBUTIONS: \$408.6 million

(in millions)



1 Net of returned funds and other adjustments  
2 Polio transfers  
3 Total new commitments to the Endowment Fund  
4 Includes cash contributions to global grants, the Disaster Response and donor advised funds, and directed gifts

## Insert OF-4: Charity Navigator Rating

# Foundation receives highest rating from Charity Navigator

For the 10th consecutive year, The Rotary Foundation has received the highest rating—four stars—from Charity Navigator, an independent evaluator of charities in the U.S.

In the most recent ratings, ***the Foundation earned the maximum of 100 points*** for demonstrating both strong financial health and commitment to accountability and transparency.


In a letter to the Foundation, Charity Navigator notes that “only one percent of the charities we evaluate have received at least ten consecutive 4-star evaluations, indicating that The Rotary Foundation outperforms other charities in America. This exceptional designation from Charity Navigator sets The Rotary 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.

Charity Navigator - Rating for :

The Rotary Foundation of Rotary International

Enabling Rotarians to advance world understanding, goodwill, and peace

Score (out of 100)	Rating
<b>Overall Score &amp; Rating</b>	99.40. 
Financial	99.16
Accountability & Transparency	100.00

This rating was published 12/01/2020 and includes data from FY2019, the most recent 990 received at that time.

## Insert OF-5: Donor Recognitions

# DONOR RECOGNITIONS

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 of \$1,000 or more 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. Learn more about [Paul Harris Fellow recognition](#).

### 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. Learn more about the [Paul Harris Society](#).

### 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. Learn more about the [Arch Klumph Society](#).

- 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**

A designation provided to clubs in which every dues-paying member supports The Rotary Foundation's Endowment with a minimum commitment of \$1,000 or more in an estate plan or via an outright gift of \$1,000 or more. A certificate honoring the achievement will be provided upon request.

### **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.

# ROTARY DIRECT

Rotary's recurring giving program



## ROTARY DIRECT SAVES...

- ✓ **Time** — Sign up once to give continuous support
- ✓ **Money** — Lower administration costs means more money for programs
- ✓ **Lives** — Give to The Rotary Foundation to do good in the world

## There are four ways to enroll in Rotary Direct:

- Online:** [my.rotary.org/en/rotary-direct](http://my.rotary.org/en/rotary-direct)  
**By mail:** Rotary Direct, 17th Floor, Annual Giving  
 One Rotary Center  
 1560 Sherman Avenue  
 Evanston, IL 60201-3698 USA  
**By phone:** +1-866-976-8279  
**By fax:** +1-847-328-5260

Manage your recurring giving at any time by signing in to My Rotary and going to Donor Self-Service.

**YES! I INTEND TO GIVE US\$1,000 OR MORE ANNUALLY AND WILL JOIN THE PAUL HARRIS SOCIETY.\***

**YES! I WILL ENROLL IN ROTARY DIRECT.**

Name \_\_\_\_\_

### IF YOU ARE A ROTARIAN, PLEASE COMPLETE.

Rotary membership ID \_\_\_\_\_

Club name \_\_\_\_\_

Club number \_\_\_\_\_

Billing address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Postal code \_\_\_\_\_ Country \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

*Contributions are tax deductible where allowed by law. For security purposes, please do not send credit card contributions via email.*

*\*Note: By checking this box, donors notify The Rotary Foundation of their intention to contribute US\$1,000 or more every Rotary year to the Annual Fund or PolioPlus Fund. Learn more at [rotary.org/jphs](http://rotary.org/jphs).*

### GIFT DESIGNATION (choose one)

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Annual Fund — SHARE         | <input type="checkbox"/> Eradicating polio       | <input type="checkbox"/> Promoting peace         |
| <input type="checkbox"/> Fighting disease            | <input type="checkbox"/> Providing clean water   | <input type="checkbox"/> Supporting education    |
| <input type="checkbox"/> Saving mothers and children | <input type="checkbox"/> Growing local economies | <input type="checkbox"/> Responding to disasters |

### RECURRING GIFT AMOUNT (minimum US\$10)

\$25  \$85  \$100  \$250  \$1,000  Other \_\_\_\_\_

Currency (if not US\$) \_\_\_\_\_

### FREQUENCY

Monthly  Quarterly  Annually (specify month) \_\_\_\_\_

**CHECKING ACCOUNT**, please attach a voided check

*Available for U.S. and Canada bank accounts only*

*Not available online*

### CREDIT OR DEBIT CARD

Visa  MasterCard  AmEx  Discover

Card number:

Expiration   /     CVN

Signature \_\_\_\_\_



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, such as for Rotary fundraising purposes, financial processing, donor recognition, and record keeping. Personal data collected with this contribution is subject to Rotary's Privacy Policy found at [rotary.org/privacy](http://rotary.org/privacy).