



THE ROTARY FOUNDATION  
**REFERENCE  
GUIDE**





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All figures are in U.S. dollars.

# THE ROTARY FOUNDATION

The mission of The Rotary Foundation is to enable Rotary members to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. The Foundation is a not-for-profit corporation supported solely by voluntary contributions from Rotary members and friends of the Foundation who share its vision of a better world. This support is essential to make possible projects, funded with Foundation grants, that bring sustainable improvement to communities in need.



# POLIOPLUS

Polio eradication is Rotary's top philanthropic priority. When Rotary launched the PolioPlus program in 1985, there were more than 350,000 polio cases in over 125 countries. Since 1988, when Rotary began working with its partners in the Global Polio Eradication Initiative to immunize more than 2 billion children, the incidence of polio has decreased 99 percent. As of 2013, Rotary's contributions to the global polio eradication effort totaled \$1.2 billion.

## POLIOPLUS GRANTS

**Purpose** PolioPlus grants support global eradication efforts in polio-endemic countries and those that have imported the disease or are at high risk for it. Activities include conducting National Immunization Days and monitoring poliovirus transmission.

**Funding** PolioPlus grants are funded from the general PolioPlus Fund and District Designated Fund contributions.

**Application** Proposals are submitted primarily by major partner agencies, such as the World Health Organization or UNICEF, or national PolioPlus committee chairs (listed in the Official Directory [007-EN]).

**Decision** Trustees approve PolioPlus grants at regularly scheduled meetings.

## POLIOPLUS PARTNERS GRANTS

**Purpose** PolioPlus Partners grants support urgent social mobilization and surveillance projects submitted by Rotary members in polio-endemic countries and those that have imported the disease or are at high risk for it.

**Funding** PolioPlus Partners grants are funded from the general PolioPlus Fund.

- Application** Grant applications are accepted only from national PolioPlus committee chairs in priority countries.
- Decision** Grants are approved on a rolling basis.

## **POLIOPLUS RESOURCES**

- End Polio Now: Monthly [e-newsletter](#) with updates and news about polio eradication efforts
- End Polio Now video and digital resources (942-USB): USB drive loaded with polio-focused materials, including the new End Polio Now video, End Polio Now logo, polio images, and broadcast quality PSAs
- End Polio Now brochure (940-EN): Describes Rotary’s commitment to eradicating polio and encourages support
- End Polio Now poster (941-EN): Describes Rotary’s commitment to eradicating polio and encourages support
- End Polio Now pins (988-MUP): Lapel pins with the End Polio Now logo
- End Polio Now Advocacy Flier (943-EN): Four-page flier with the top five reasons to eradicate polio and four ways to take action
- End Polio Now — Make History Today (944-EN): Infographics that explain the Bill & Melinda Gates Foundation’s 2-for-1 agreement with Rotary
- [www.endpolionow.org](http://www.endpolionow.org)

For ordering information, see page 27.

# ROTARY PEACE FELLOWSHIPS

- Purpose** Rotary Peace Fellowships enable individuals to pursue a graduate degree in international relations, peace, conflict resolution, and related subjects, or a professional development certificate in peace and conflict studies at one of the six Rotary Peace Centers.
- Funding** Fellowships cover transportation, tuition, qualified internships, room and board, and other limited expenses for the duration of the program. Fellowships are supported through a pool of funds contributed by districts from their District Designated Fund, through term gifts, Rotary's Endowment Fund, and the World Fund.
- Application** District submits a Rotary Peace Fellowship Application.
- Deadlines** District can submit an unlimited number of qualified applications by 1 July for world-competitive selection. Find out your district's deadline from your district Rotary Peace Fellowships subcommittee chair.
- Criteria** A candidate should have:
- A bachelor's degree or equivalent for a master's degree program, a strong academic background for a professional certificate program
  - Work or service experience in relevant fields
  - English proficiency for both programs, and knowledge of a second language for master's degree
  - A demonstrated commitment to peace and international understanding

## Decision

Up to 50 master's degree and 50 professional development certificate fellows are selected annually. Trustee-approved applicants are notified by 15 November.

## Ineligibility

The following are not eligible for fellowships: Rotarians; honorary Rotarians; employees of a club, district, or other Rotary entity, including Rotary International; spouses, lineal descendants (children or grandchildren by blood, legal adoption, or marriage without adoption), spouses of lineal descendants, or ancestors (parent or grandparent by blood) of any living person in the foregoing categories. However, such individuals are eligible to apply for the short-term professional development program at Chulalongkorn University in Bangkok.

## ROTARY PEACE FELLOWSHIPS RESOURCES

- Peace in Action: Monthly [e-newsletter](#) with updates and news about Rotary Peace Fellowships
- Rotary Peace Centers brochure (084-EN): Fold-out brochure with general information about the program
- Peace Is Possible brochure (850-EN): Provides an overview of the Rotary Peace Centers and available naming opportunities
- Rotary Peace Centers pins (089-MUP): Lapel pins with the dove and Rotary logo
- [www.rotary.org/peace-fellowships](http://www.rotary.org/peace-fellowships)

For ordering information, see page 27.



# GRANTS

Rotary Foundation grants support Rotarians' efforts to change lives and serve communities.

## DISTRICT GRANTS

District grants are block grants that enable clubs and districts to address immediate needs in their communities and abroad. Districts may request up to 50 percent of their District Designated Fund for one grant annually (see Annual Fund-SHARE on page 13). Districts manage and disburse these funds to support district- and club-sponsored activities, including vocational training teams, scholarships, humanitarian service projects, and cultural exchanges, provided they are aligned with the Foundation's mission.

## GLOBAL GRANTS

Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale international humanitarian projects, vocational training teams, and scholarships that have sustainable, measurable outcomes in one or more of Rotary's areas of focus (see pages 6-7). Activities may be carried out individually or in combination — for example, one grant may support a vocational training team and a related humanitarian project.

Global grant projects must have a minimum total budget of \$30,000. This includes the World Fund award, which is based on a 100 percent match of District Designated Fund allocations or a 50 percent match of cash contributions from the sponsors. All global grants must be sponsored by two clubs or districts: a host partner in the country where the activity takes place and an international partner outside that country.

When planning a global grant project, sponsors should conduct a thorough needs assessment that explores the pressing concerns in the project location as well as the club and community resources available to address them.

## AREAS OF FOCUS

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

### Peace and conflict prevention/resolution

- Providing training for leaders, and young potential leaders, in prevention and mediation of conflict
- Supporting peace-building in communities and regions affected by conflict
- Supporting studies related to peace and conflict prevention and resolution by career-minded professionals

### Disease prevention and treatment

- Improving the capacity of local health care professionals
- Supporting disease prevention programs in order to limit the spread of communicable diseases and reduce the incidence of and complications from noncommunicable diseases
- Enhancing the health infrastructure of local communities
- Educating people and mobilizing communities to prevent the spread of major diseases
- Preventing physical disability resulting from disease or injury
- Supporting studies related to disease prevention and treatment by career-minded professionals

### Water and sanitation

- Providing equitable access to safe water, good sanitation, and hygiene
- Strengthening the ability of communities to develop, fund, and maintain sustainable water and sanitation systems
- Supporting programs that enhance communities' awareness of the benefits of safe water, sanitation, and hygiene
- Supporting studies related to water and sanitation by career-minded professionals

## Maternal and child health

- Reducing mortality and morbidity rates for children under age five
- Reducing maternal mortality and morbidity rates
- Improving mothers' and children's access to essential medical services, trained community health leaders, and health care providers
- Supporting studies related to maternal and child health by career-minded professionals

## Basic education and literacy

- Involving communities to support programs that strengthen their capacity to provide basic education and literacy to all
- Increasing adult literacy
- Working to reduce gender disparity in education
- Supporting studies related to basic education and literacy by career-minded professionals

## Economic and community development

- Building the capacity of entrepreneurs, community leaders, local organizations, and community networks to support economic development in impoverished communities
- Developing opportunities for productive work
- Reducing poverty in underserved communities
- Supporting studies related to economic and community development by career-minded professionals

## SUSTAINABILITY

Sustainability means different things to different organizations. For The Rotary Foundation, sustainability means providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends. Global grant projects must be sustainable and display the following characteristics:

- **Community needs** — The host community and Rotary project sponsors develop projects based on the community's assessment of its needs and strengths.
- **Appropriate technology** — Project materials are appropriate for the community and, ideally, are purchased locally.

- **Sustainable funding** — The community is able to sustain the project without ongoing financial support from The Rotary Foundation or other Rotary sources.
- **Knowledge transfer** — The project includes teaching beneficiaries how to address their ongoing needs after the project is completed.
- **Motivation** — The community is able to assume ownership of the project upon its completion.
- **Monitoring and evaluation** — The project includes a measurement plan to confirm significant improvement, ideally for at least three years.

## SCHOLARSHIPS

Scholarships can be funded by district grants and global grants. District grants have no restrictions on the educational level of the scholarship (e.g., undergraduate or graduate), duration of the program, or field of study. Districts may develop their own criteria for selecting scholars, determine the monetary amount of the awards, and support students attending local universities, as there is no international requirement.

Global grants support international graduate-level study related to an area of focus for one to four years.

Today's scholars are tomorrow's leaders within the areas of focus.

## VOCATIONAL TRAINING TEAMS

Vocational training teams can be supported by district grants and global grants. Teams sponsored by district grants have no restrictions on participant age or the duration or focus of the exchange.

Global grants address humanitarian needs by supporting teams that travel abroad to provide or receive training in one or more areas of focus. At least one team leader, preferably a Rotarian, and two members are required per team. There is no maximum team size or age restriction, but all team participants should have relevant professional skills and experience.

Global grant-sponsored teams may provide or receive training in various settings, including universities, hospitals, and companies, and may stay in a range of places, such as Rotary members' homes, university dormitories, and hotels. Training may last for any length of

time, and more than one team may travel on a single grant. Training team costs must meet the \$30,000 global grant minimum for total project cost, including team member expenses and other grant activities.

## **QUALIFICATION AND STEWARDSHIP**

### **What districts must do**

To participate in district grants and global grants, districts must complete an online qualification process in which they agree to follow and implement the financial and stewardship guidelines in the district memorandum of understanding. Each district must also conduct a grant management seminar as part of the qualification process for clubs.

Each district is responsible for providing careful stewardship of Foundation funds. The requirements detailed in the memorandum of understanding include the following:

- Have a written financial management plan
- Plan activities thoroughly and involve Rotarians directly in project implementation
- Demonstrate transparency in all financial transactions
- Report to clubs each year on the use of the District Designated Fund
- Submit reports to the Foundation promptly
- Develop a method for reporting and resolving misuse of grant funds

### **What clubs must do**

Clubs must complete an annual qualification process to be eligible for global grants. To qualify, clubs must send one or more members to the district's grant management seminar, sign and adhere to the club memorandum of understanding, and fulfill any additional qualification requirements set by the district. Clubs are also expected to comply with the stewardship requirements detailed in the club memorandum of understanding.

## GRANT APPLICATION PROCESS

Once they are qualified, clubs and districts may submit grant applications online.

District grants follow a two-year business model: Planning and applying happen during the first year, and projects take place during the second.

The Rotary Foundation administers global grants through a two-step application process. The first step gives sponsors an opportunity to confirm that their project meets global grant requirements. This ensures that sponsors are familiar with the Foundation's eligibility standards before they spend significant time preparing a grant application. In the second step, applicants provide all the information necessary for the Foundation to make a grant award decision.

## REPORTING

Districts are required to submit a report to the Foundation and to all clubs in the district on the disbursement of funds within 12 months of receiving a district grant. Global grant sponsors must submit progress reports every 12 months for the life of the grant and a final report within two months of the grant's completion.

## GRANTS RESOURCES

- Giving & Grants: Quarterly [e-newsletter](#) with information about fundraising and grants
- Grant Management Manual (1000-EN): Resource for clubs and districts on managing global grants
- Lead Your District: Rotary Foundation Committee (300-EN): Resource for district leaders about Foundation activities, including information about district grants
- Terms and Conditions for Rotary Foundation District Grants and Global Grants: Detailed information about grants and eligibility requirements
- [www.rotary.org/grants](http://www.rotary.org/grants)

For ordering information, see page 27.

# ROTARY ALUMNI

The Rotary Foundation has a proud history of funding more than 125,000 people to participate in its programs for various scholarships and vocational exchanges. Now Rotary has expanded its view of alumni to include participants of New Generations programs, including Rotaract, Interact, Youth Exchange, and RYLA.

As talented, committed individuals, alumni know Rotary well and share its vision of furthering world understanding and peace. Alumni are powerful advocates for Rotary because they put a human face on Rotary activities and demonstrate a commitment to the world community. They serve as volunteers for local and international service projects and are potential Rotary club members and Foundation donors. They are available to speak at Rotary functions or participate in Rotary programs. Contact your district alumni subcommittee chair or district Rotary Foundation committee chair to find alumni available for speaking engagements or club activities.

Consider nominating an outstanding Foundation alumnus for the Global Alumni Service to Humanity Award, the Foundation's highest alumni honor. Each Rotary district may nominate one qualified alumnus per year.

Rotary alumni associations are groups of alumni that unite to pursue service and fellowship. There are more than 120 alumni associations worldwide, and the number is growing. Consider nominating an association in your area for the Alumni Association of the Year Award, an honor given to an outstanding group that promotes Service Above Self within the Rotary family. If there is no alumni association in your area, consider starting one.

## ALUMNI RESOURCES

- Reconnect: Quarterly [e-newsletter](#) with news and information for alumni
- Rotary Alumni Association of the Year Nomination Form: Describes the criteria and nomination process for the Alumni Association of the Year Award

- Rotary Alumni Association of the Year recipients: Describes past winners of this award
- The Rotary Foundation Global Alumni Service to Humanity Award Nomination Form: Describes the criteria and nomination process for the Global Alumni Service to Humanity Award
- The Rotary Foundation Global Alumni Service to Humanity Award recipients: Describes past winners of this award
- Alumni pins: Lapel pin to recognize alumni, available for purchase through the Foundation Recognition Replacement Form
- Frequently Asked Questions: Explores basic information on Rotary alumni associations
- [www.rotary.org/alumni](http://www.rotary.org/alumni)



# FOUNDATION FUNDING

## ANNUAL FUND-SHARE

### Purpose

Annual Fund-SHARE is the primary source of funding for a broad range of local and international Rotary Foundation activities.

Every Rotarian, Every Year (EREY) is the fundraising initiative to encourage support for the Foundation's Annual Fund. EREY aims to engage every Rotary club member by:

- Encouraging every Rotarian to contribute to the Annual Fund every year
- Encouraging every Rotarian to participate in a Foundation grant or program every year

### How fund works

Through the SHARE system, contributions to The Rotary Foundation are transformed into grants that change lives.

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

- Fifty percent is credited to the World Fund.\*
- Fifty percent is credited to the District Designated Fund.

The Foundation uses the World Fund portion to pay for the worldwide grant and program opportunities available to all Rotary districts. Your district uses the District Designated Fund portion to fund the Foundation grants and programs of its choice.

The Rotary Foundation's funding cycle makes district contributions available for use three years after they are received. The three-year cycle gives districts time to plan projects and activities and allows the Foundation to invest the contributions.

Your district Rotary Foundation committee decides how to use the District Designated Fund allocations in consultation with the clubs in the district. Districts may use up to 50 percent of the fund (which might also include spendable earnings from gifts to the Endowment

Fund-SHARE) for district grants; the remainder may be used for global grants or be donated to PolioPlus, Rotary Peace Centers, or another district.

In addition to SHARE, donors may direct their Annual Fund contributions directly to the World Fund or to one of the Foundation's six areas of focus. Annual Fund contributions directed to an area of focus are credited toward a club's annual giving goal and per capita giving calculations. Likewise, these contributions are eligible for all Annual Fund recognition opportunities, including EREY, Rotary Foundation Sustaining Member, Paul Harris Fellow, Paul Harris Society, Major Donor, and Arch Klumph Society. They also count toward all club recognition opportunities.

Contributions designated for areas of focus are not included in a district's SHARE calculation and do not generate any increases in the amount of the District Designated Fund. Because Annual Fund-SHARE contributions are the primary source of funding for Foundation grants, SHARE-designated contributions from Every Rotarian, Every Year remain crucial and therefore are strongly encouraged.

**\*Note:** To safeguard the Foundation's ability to support Rotarians, clubs, and districts, the Trustees have laid out a clear order of priority to ensure that programs, operating expenses (fund development and general administrative expenses), and the operating reserve are funded. The funding model that will take effect on 1 July 2015 will provide a more predictable level of financial support for programs and the operating expenses it takes to make them successful. Learn more about the long-term strategy to secure the Foundation's future by reading the PowerPoint presentation at [www.rotary.org](http://www.rotary.org).

Most nonprofit organizations allocate a percentage of their contributions to support future fundraising efforts. Looking ahead, the Foundation will continue its strong record of financial accountability and transparency.

## ENDOWMENT FUND

### Purpose

Ensures the long-term viability of the Foundation's grants and programs. Spendable earnings from this endowed fund also enable the Foundation to expand existing activities and occasionally underwrite new ones like the Rotary Peace Centers.

**How fund works** Contributions are invested in perpetuity. A percentage of the total value of the fund is directed annually to Foundation grants and programs.

**Types of contributions**

- Outright gifts of cash, investments, or other property
- Life income gifts (e.g., charitable remainder trusts, charitable gift annuities, pooled-income funds)
- Testamentary gifts through wills or estate plans
- Beneficiary of life insurance, retirement plan accounts, or other financial accounts

## FOUNDATION FUNDING RESOURCES

- Giving & Grants: Quarterly [e-newsletter](#) with information about fundraising and grants
- Ways to Give brochure (173-EN): Provides an overview of Annual Fund, Endowment Fund, term gift, and Rotary Peace Centers endowed naming opportunities
- Every Rotarian, Every Year brochure (957-EN): For distribution to every club member, outlining the need for Rotarians to participate in and contribute to Rotary Foundation grants and activities
- Doing Good in the World DVD (978-DVD-MU): Videos showing how the Foundation and its partners are achieving sustainable results in Rotary’s six areas of focus — and how you can help
- Peace Is Possible brochure (850-EN): Provides an overview of the Rotary Peace Centers and available naming opportunities
- Your Rotary Legacy brochure (330-EN): Describes benefits of giving to the Endowment Fund and provides a form to join the Bequest Society or to register as a benefactor
- [www.rotary.org/plannedgiving](http://www.rotary.org/plannedgiving)

For ordering information, see page 27.

# RECOGNITION

The Rotary Foundation shows its appreciation to individuals and clubs for personal outright contributions supporting its humanitarian and educational activities.

## INDIVIDUAL RECOGNITION OPPORTUNITIES

### Rotary Foundation Sustaining Member

A Rotary Foundation Sustaining Member is an individual who contributes \$100 or more each year to the Annual Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition. To obtain the annual Sustaining Member badge sticker in recognition of these contributions, contact your Rotary club president.

### Paul Harris Fellow

Paul Harris Fellow recognition is given to an individual who contributes (or in whose name is contributed) \$1,000 or more cumulatively to the Annual Fund, PolioPlus, or an approved Foundation grant. Recognition consists of a certificate and pin. An optional medallion is available for \$15.



### Certificate of Appreciation

Occasionally, a donor contributes \$1,000 and wishes to recognize a business or organization. In these instances, a Certificate of Appreciation is given instead of Paul Harris Fellow recognition, which is only for individuals.



## Multiple Paul Harris Fellow

Multiple Paul Harris Fellow recognition is given at subsequent \$1,000 levels. Recognition consists of a pin set with stones corresponding to the 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



## Paul Harris Society

The Paul Harris Society recognizes Rotarians and friends of The Rotary Foundation who personally contribute \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant each year. While this recognition was originally a district-administered program, the Trustees adopted the Paul Harris Society as an official recognition program of The Rotary Foundation effective 1 July 2013. Paul Harris Society contributions count toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, Major Donor, and Arch Klumph Society recognition. Recognition consists of a chevron-style pin provided by your district Paul Harris Society coordinator.



## Major Donor

The Rotary Foundation recognizes individuals or couples whose combined giving has reached \$10,000, regardless of the gift designation. This recognition level can be achieved only through personal contributions and not through recognition points. Major Donors may elect to receive a crystal recognition piece and wearable recognition commemorating the gift at each new recognition level.

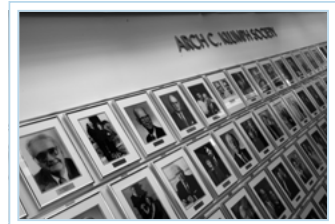
- \$10,000 to \$24,999.99 – level 1
- \$25,000 to \$49,999.99 – level 2
- \$50,000 to \$99,999.99 – level 3
- \$100,000 to \$249,999.99 – level 4



## Arch Klumph Society

Donors who contribute \$250,000 or more become members of the Arch Klumph Society. Portraits, biographies, and, in some cases, video clips are housed in the society's interactive galleries, one of which is located at Rotary International World Headquarters, while the other travels to Rotary events around the world. Members also receive lapel pins and pendants, signed certificates, and invitations to the society's exclusive events, held worldwide. New members are invited to an induction ceremony at RI World Headquarters.

- Trustees Circle – \$250,000 to \$499,999.99
- Chair's Circle – \$500,000 to \$999,999.99
- Foundation Circle – \$1,000,000 and more



## Benefactor

A Benefactor is an individual who informs The Rotary Foundation in writing that he or she has provided for the Foundation in his or her estate plan, or who makes an outright gift of \$1,000 or more to the Endowment Fund. Benefactors receive a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin.



## Bequest Society

The Rotary Foundation recognizes couples or individuals who have made commitments in their estate plans totaling \$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and wearable recognition commemorating the commitment at each new recognition level.



- \$10,000 to \$24,999.99 — level 1
- \$25,000 to \$49,999.99 — level 2
- \$50,000 to \$99,999.99 — level 3
- \$100,000 to \$249,999.99 — level 4
- \$250,000 to \$499,999.99 — level 5
- \$500,000 to \$999,999.99 — level 6
- \$1,000,000 and more — level 7



## CLUB RECOGNITION OPPORTUNITIES

### Every Rotarian, Every Year Club

This banner is awarded to clubs that achieve a minimum of \$100 in per capita giving and 100 percent participation, with every active (dues-paying) member contributing some amount to the Annual Fund during the Rotary year. This annual recognition is awarded at the end of the Rotary year.



## 100% Rotary Foundation Sustaining Member Club

This banner is awarded to clubs in which every active (dues-paying) member personally contributes \$100 or more to the Annual Fund during the Rotary year. This annual recognition is awarded at the end of the Rotary year.



## Top Three Per Capita Clubs in Annual Fund Giving

Banners are given to the top three per capita giving clubs in each district. To be eligible, clubs must achieve a minimum of \$50 in per capita annual giving. This banner is awarded at the end of the Rotary year.



## 100% Paul Harris Fellow Club

In order for a club to be eligible, every active (dues-paying) member must be a Paul Harris Fellow when banner recognition is requested. To obtain this recognition, a club leader contacts the district governor, confirming the club's eligibility, and the governor submits a recognition request to The Rotary Foundation. The club receives a banner, and its name is included on the list of 100% Paul Harris Fellow Clubs at [www.rotary.org](http://www.rotary.org). This one-time-only recognition is awarded throughout the Rotary year.



## RECOGNITION RESOURCES

- Every Rotarian, Every Year Rotary Foundation Sustaining Member badge stickers (956-EN): For donors who become Rotary Foundation Sustaining Members with Annual Fund contributions of \$100 or more each year
- Paul Harris Society brochure (099-EN): Promotes the Paul Harris Society program, which recognizes donors who make a commitment to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or approved Foundation grants

For ordering information, see page 27.



# FOUNDATION RECOGNITION POINTS

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, PolioPlus, or an approved Foundation grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Contributions to the Endowment Fund are not eligible.

Donors can extend Foundation recognition points to others to help them become, or to name them as, a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor's death, when they expire, or until the donor (or his or her surviving spouse) uses the points.

**Note:** Foundation recognition points do not count toward Paul Harris Society and Major Donor recognition.

## Transfer rules

A minimum of 100 Foundation recognition points must be transferred at a time, and an authorizing signature is required when completing the Paul Harris Fellow Recognition Transfer Request Form, available at [www.rotary.org](http://www.rotary.org).

**Note:** Foundation recognition points may not be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow to receive recognition points.

# FOUNDATION AWARDS

## THE ROTARY FOUNDATION DISTRICT SERVICE AWARD

**Nominators: District governors**

**Deadline: Ongoing**

The Rotary Foundation created the District Service Award to recognize Rotarians' Foundation-related humanitarian efforts. Honorees receive a certificate, awarded at the district level. (District governors may obtain up to 20 blank certificates at no cost.)

## THE ROTARY FOUNDATION CITATION FOR MERITORIOUS SERVICE

**Nominators: District governors**

**Deadline: Ongoing**

This award recognizes Rotarians who have demonstrated active service to The Rotary Foundation for more than one year.

## THE ROTARY FOUNDATION DISTINGUISHED SERVICE AWARD

**Nominators: Any Rotarian**

**Deadline: 30 June**

Four complete Rotary years after receiving the Citation for Meritorious Service, a Rotarian becomes eligible for the Distinguished Service Award. Because this is the Foundation's highest service recognition, a recipient's exemplary service to the Foundation must extend beyond the district level and occur over an extended period.

## SERVICE AWARD FOR A POLIO-FREE WORLD

**Nominators: Any Rotarian**

**Deadline: 1 November**

This award was established by the Trustees of The Rotary Foundation to recognize Rotarians' outstanding contributions to the polio eradication campaign and thereby to encourage efforts in the final push to eradicate the disease. In geographic areas coinciding with World Health Organization regions, up to 10 service awards per region are given annually, recognizing outstanding service in polio eradication. International awards, for broad service to the cause, are also made annually, to a maximum of 10 individuals.

## THE ROTARY FOUNDATION GLOBAL ALUMNI SERVICE TO HUMANITY AWARD

**Nominators: Regional Rotary Foundation coordinators**

**Deadline: 30 June**

This award was created to honor an outstanding Rotary Foundation alumnus whose career and activities illustrate the impact of the Foundation's programs on his or her service to humanity. Nominees must have demonstrated the social benefits of the Foundation's programs through extraordinary service activities and professional achievement, distinction in their profession or vocation, and sustainable service affecting the international community.

## ROTARY ALUMNI ASSOCIATION OF THE YEAR AWARD

**Nominators: Regional Rotary Foundation coordinators**

**Deadline: 30 June**

This award recognizes an alumni association that has increased awareness of the significant role alumni play in Rotary and has demonstrated the lasting impact of Rotary programs.

Nomination forms are available for download at [www.rotary.org/awards](http://www.rotary.org/awards). See forms for complete criteria.

# GENERAL RESOURCES

## MY ROTARY

The member website, known as My Rotary, is where you will find everything you need to conduct your Rotary business. Familiar tools and applications, formerly available through Member Access, are now found under Club & District Administration. Create an account and sign in so you can:

- Monitor club membership initiatives, service activities, and Foundation giving goals through Rotary Club Central
- Give to The Rotary Foundation
- Learn more about Rotary Foundation activities
- Find volunteers, partners, and donations for your projects
- Apply for grants
- View your Donor History Report, which includes your contribution history and recognition summary
- Customize and share your profile
- Join or start a discussion group
- Search a dedicated Document Center to find important resources by category
- Learn about service projects worldwide and put your club's project on display through Rotary Showcase

## REPORTS

Rotary leaders can access the following reports through My Rotary or Rotary's Support Center.

<b>Report</b>	<b>Information available</b>	<b>Type</b>	<b>Format</b>	<b>Location</b>
Donor History Report	Provides a comprehensive breakdown of a donor's transactions (contributions, Foundation recognition point transfers, commitments, and recognition); use to reconcile contributions/ recognition issues	Individual	PDF	My Rotary, Support Center
EREY Eligibility Report	Provides eligibility dates achieved for EREY, Rotary Foundation Sustaining Member, and Paul Harris Society for current and previous Rotary years	Club, District	PDF, Excel	My Rotary, Support Center
Club Fundraising Analysis	Provides a five-year dashboard of Annual Fund goals, giving, and recognition totals; use to set goals, which are submitted through Rotary Club Central	District	PDF, Excel	My Rotary, Support Center
Club Recognition Summary	Provides members' Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct participation, benefactors, last contribution date, and designation; indicates 100% Paul Harris Fellow Club achievement and date, along with the clubs' all-time Foundation giving; use to identify noncontributing clubs	Club, District	PDF, Excel	My Rotary, Support Center

<b>Report</b>	<b>Information available</b>	<b>Type</b>	<b>Format</b>	<b>Location</b>
Monthly Contribution Report	Provides contribution information by club for Annual Fund, other funds (global grants and PolioPlus), and Endowment Fund	District	PDF, Excel	My Rotary, Support Center
Annual Fund Banner Recognition Status Report	Shows progress toward club banner recognitions (Top Three Per Capita in Annual Giving, EREY Club, 100% Rotary Foundation Sustaining Member Club) for a Rotary year; lists the percentage of participation by club for EREY and Sustaining Member recognition	District	PDF, Excel	Support Center
Paul Harris Society Report	Provides Paul Harris Society membership and a four-year history of eligibility; includes tab with donor contact information	Club, District, Zone	PDF, Excel	My Rotary, Support Center
District Fundraising Profile	Provides an eight-year dashboard for district giving to the Annual Fund and Endowment Fund, and total contributions received; lists cumulative number of Paul Harris Society-eligible members, Major Donors, major gifts, benefactors, and Bequest Society members; lists number of total endowed funds and their market value	District	PDF, Excel	Support Center

Report	Information available	Type	Format	Location
Recognition Report	Provides lists of Bequest Society, Major Donor, and Arch Klumph Society members with their recognition date; includes two tabs with mailing address information	Club, District, Zone	PDF, Excel	Support Center

## ORDERING PUBLICATIONS

Rotary Foundation resources can be ordered at [shop.rotary.org](http://shop.rotary.org); from Publications Order Services (email: [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org); phone: +1-847-866-4600; fax: +1-847-866-3276); or from the local Rotary International office.

## WHERE TO DIRECT QUESTIONS

Call +1-866-976-8279 or email [contact.center@rotary.org](mailto:contact.center@rotary.org) — Rotary’s Support Center — to check on contributions and recognition points, find information about grants, and ask questions.

Non-English-speaking Rotarians should contact their local Rotary International office.

## ZONE RESOURCES

The regional Rotary Foundation coordinators (RRFCs) are responsible for the promotion of Foundation activities and fundraising for the Foundation in their zone or area. RRFCs train their zone team of assistant regional Rotary Foundation coordinators and district leaders in setting and achieving fundraising and program goals.

Endowment/major gifts advisers work closely with regional and district leaders to develop personalized plans for identifying, cultivating, and soliciting major gifts. They also help facilitate events that engage current Foundation supporters and develop prospective donors.

A list of current RRFCs and endowment/major gifts advisers is available at [www.rotary.org](http://www.rotary.org).

Zone team members are effective speakers and trainers at regional, district, and club events.

## DISTRICT RESOURCES

To provide continuity of leadership, the district Rotary Foundation committee chair is appointed for a three-year term. The three incoming district governors (if selected) for the chair's term will participate in selecting the chair. This selection should occur and be reported to the Foundation no later than 1 March of the calendar year in which the chair takes office, on 1 July.

The district Rotary Foundation committee chair may be appointed for another three-year term, with the agreement of the governors under whom the chair will serve. If possible, this post should be filled by a past district governor. (It cannot be filled by the current governor.) A district does not have access to its District Designated Fund until the chair is appointed. The chair serves under the leadership of the district governor, and decisions on the use of the District Designated Fund must reflect the decisions of the district Rotary Foundation committee, which is composed of its subcommittee chairs. The subcommittee chairs, listed below, are appointed annually by the district governor under whom they will serve:

- PolioPlus subcommittee chair
- Grants subcommittee chair
- Fundraising subcommittee chair
- Stewardship subcommittee chair
- Others as deemed necessary by the district

In 2014, the Gift and Estate Planning Professionals Group was officially launched. The GEPP Group allows individuals who have expertise in gift planning to volunteer to be on a list that is made available to district and zone leaders for use in promoting gifts to the Endowment Fund and structuring individual gifts. Email [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org) for more information.

## MAKING A CONTRIBUTION

Contributions to The Rotary Foundation may be made by check, credit card, wire transfer, or through your Rotary club. At [www.rotary.org/give](http://www.rotary.org/give), individuals and clubs can make a one-time contribution or enroll in the Foundation's recurring giving program, Rotary Direct. Information on gifts of stocks, bonds, and mutual funds is also available on the website.



Individuals and clubs also can use The Rotary Foundation Contribution Form, available at [www.rotary.org](http://www.rotary.org).

With all gifts, be sure to use your member ID to ensure proper credit and recognition.

### **Matching Gifts**

The Rotary Foundation is recognized as a 501(c)(3) charity in the United States and may be eligible to receive corporate matching gifts from your employer. Many international companies also match Rotary Foundation contributions from their employees. Ask your human resources department whether your gift can be matched.

If you use The Rotary Foundation Contribution Form, send your donation to the appropriate address for your region. In countries with currency restrictions, contact your district Rotary Foundation committee chair for guidance.

## **United States**

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

## **Brazil**

Rotary International Office  
Rua Tagipuru 209  
01156-000 São Paulo, SP  
Brazil

## **Europe and Africa**

Rotary International Office  
Witikonstrasse 15  
CH-8032 Zurich  
Switzerland

## **Germany**

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

## **Great Britain and Ireland**

RI in Great Britain and Ireland  
Kinwarton Road  
Alcester  
Warwickshire B49 6PB  
England

## **Japan**

Rotary International Office  
Mita Kokusai Building 24F  
Mita 1 Chome 4-28, Minato-ku  
Tokyo 108-0073  
Japan

## **Korea**

Rotary International Office  
Room 705, Miwon Building  
43 Yoido-dong, Yongdungpo-gu  
Seoul 150-733  
Korea

## **South Asia**

Rotary International Office  
Thapar House  
2nd Floor, Central Wing  
124 Janpath  
New Delhi 110 001  
India

## **Southern South America**

Rotary International Office  
Florida 1, P. 2  
1005 Buenos Aires, CF  
Argentina

## **South Pacific and Philippines**

Rotary International Office  
Level 2  
60 Phillip Street  
Parramatta, NSW 2150  
Australia





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