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FOUNDATION FUNDING



Contributions to The Rotary Foundation come from Rotarians and friends of Rotary. The SHARE system transforms contributions into grants and programs.

At the end of the Rotary year, each district’s Annual Fund contributions that are designated as Annual Fund-SHARE are divided into two funds: 50 percent is credited to the World Fund and 50 percent to the District Designated Fund (DDF) for use in three years. The Foundation uses the portion credited to the World Fund to pay for grants and programs available to all Rotary districts. The district uses the DDF to participate in grants and programs and to make donations (for example, to PolioPlus or Rotary Peace Centers).



Rotary Reminder

Districts are notified of their available DDF total approximately one year before they can spend it.

Three-Year Funding Cycle

The Rotary Foundation operates on a three-year funding cycle designed to give districts time to plan and select project participants and to enable the Foundation to use the investment earnings to pay for administrative and fund development costs.

For example, 50 percent of Annual Fund-SHARE contributions in 2012-13 will be used as the District Designated Fund in 2015-16.

| 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---------------------------|----------------|----------------|------------|
| Funds raised and invested | Funds invested | Funds invested | Funds used |

District Designated Fund Planning

Each year, districts receive a SHARE kit, which includes a SHARE System Report, a list of spending options approved by the Trustees, and donation forms. The report shows the DDF amount available to spend in the coming Rotary year.

Your district Rotary Foundation committee is responsible for determining which Rotary Foundation grants and programs most interest the members of clubs in your district. Among the ways to determine this is by directly polling the clubs or by inviting comments through the district newsletter. With this information, the committee — in consultation with the district governor, governor-elect, and governor-nominee (if known) — decides how the district will use its DDF allocation. The district Rotary Foundation committee chair is responsible for maintaining accurate records tracking the allocation.

The district Rotary Foundation committee chair and the district governor provide the two authorizations for the use of DDF allocations, reflecting the decisions of the district Rotary Foundation committee. The Foundation deducts money from the district's fund when applications are approved or donations are made.

SHARE/DDF OPTIONS FOR 2012-13 AND 2013-14

All districts can elect to direct DDF allocations to the following:

- » PolioPlus
- » World Fund
- » Permanent Fund
- » Rotary Peace Centers
- » Other districts

Nonpilot districts in 2012-13 can make DDF allocations to the following:

- » Matching Grants
- » District Simplified Grants

Pilot districts in 2012-13 and all districts in 2013-14 can make DDF allocations to:

- » Global grants
- » District grants

In choosing any of these options, it is important to remember:

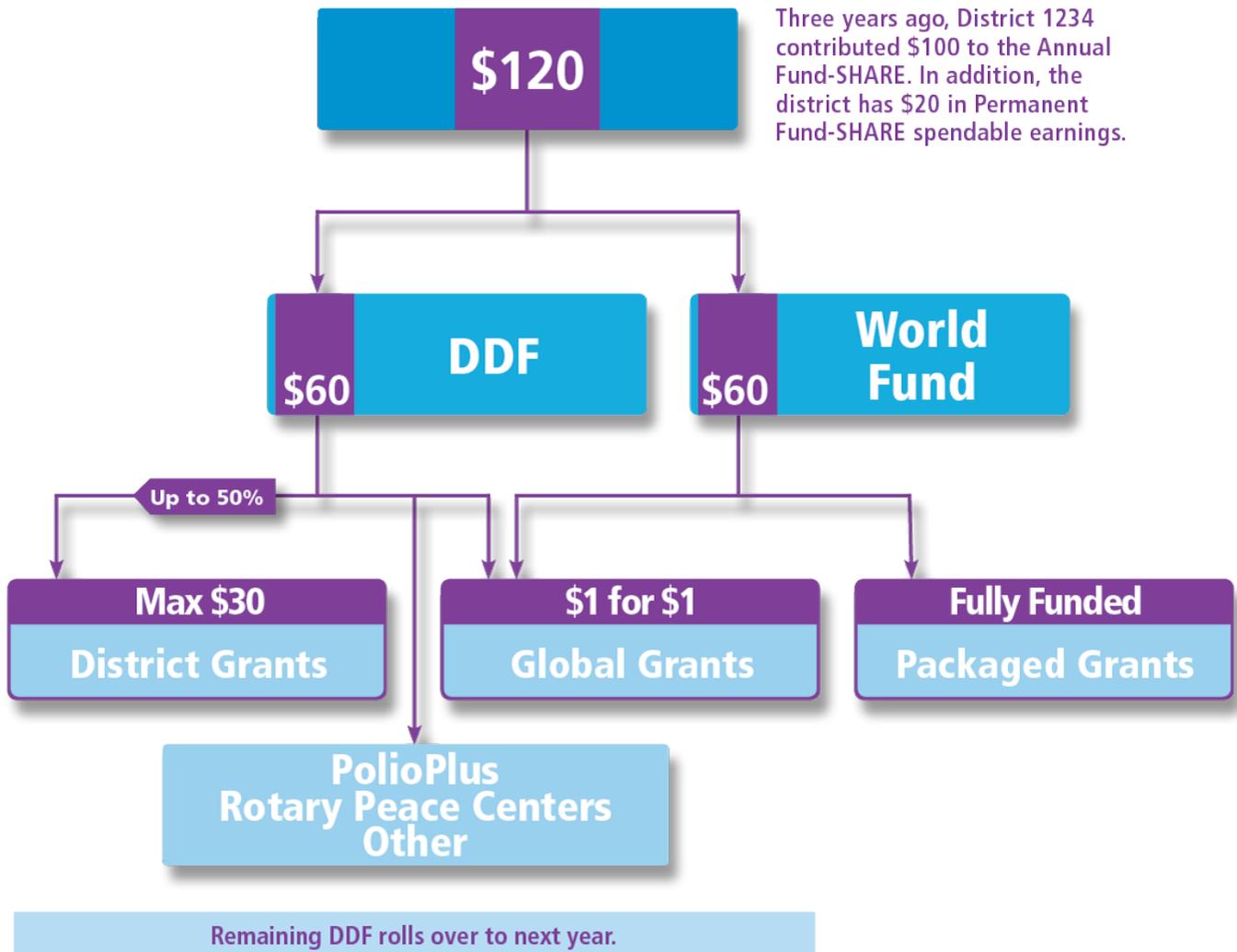
- » DDF allocations may be used only for Rotary Foundation-approved grants and programs.
- » Districts will be notified in August of any unused DDF balance available from the previous program year, which will automatically be included in the DDF total available for global grants and donations.
- » At any time during the program year, districts may request the SHARE Transaction Detail by District report to see an update of their DDF balance. Use this information to track expenditures. Only approved grants appear in the report.



Rotary Reminder

Note that the DDF balance from the previous year does not factor into the 50 percent maximum district grant calculation but can be used toward the current year's global grants or donations.

SHARE System



OTHER FUNDING FOR GLOBAL GRANTS

In addition to Annual Fund-SHARE contributions three years prior, funding options for global grants include:

- » Annual Fund-areas of focus funds
- » Annual Fund-World Fund
- » Cash for specific global grants
- » Endowment earnings designated for specific uses
- » Term gifts

For global grants, World Fund matches DDF allocations US\$1 for \$1 and cash \$0.50 for \$1.



Rotary Reminder

Remember that the Annual Fund-areas of focus funds are included in the three-year investment cycle, but are not part of the SHARE system and not included in a district's DDF calculation.



Rotary Reminder

The grants subcommittee is responsible for administering the district policy on DDF allocations for clubs and the district.



Rotary Reminder

Email the SHARE coordinator with questions about your DDF at share.mailbox@rotary.org.

District Designated Fund Allocation Policy

The district determines how the available District Designated Fund total will be used — for district and global grants, or donations to PolioPlus, Rotary Peace Centers, or other districts. To encourage participation in Rotary Foundation grants, ask clubs for input as the district creates its allocation policy. The grants subcommittee should ensure that the district's policy is shared with clubs. Communicate early so that clubs are prepared to meet district deadlines. When creating a policy, consider the following:

- » How much DDF allocations are available?
- » What are your district's goals?
- » What are your district's funding priorities?
- » What are your district's priorities for the year?
- » What are the interests of your club members?
- » How can you maximize the matched funds your district receives from the World Fund based on how you use DDF allocations?
- » What are your district's deadlines for accepting requests for district and global grant funds?
- » What will your district policy be for district grants versus global grants?
- » Must your clubs be qualified to receive district grant funds?