

# Rotary

## District 7090



**Best of Friends**



Sandi Chard-Annual Fund Chair  
Rotary Club of St. Catharines Lakeshore

# ANNUAL FUND-GIVINGS



- A Not-for Profit Corporation
- Supports the efforts of Rotary International
- To Achieve World understanding and peace
- Through International humanitarian, educational and cultural exchange program
- Operates separately from RI-Rotary International
- Has it's own separate board of Trustee
- Comes under the guidance of RI

Rotary  A Charitable arm of Rotary

# The Rotary Foundation

## Income

**Annual Fund**  
Used in 3 Yrs

**Restricted Fund**  
Polio, Donor Advised,  
Memorials, Disaster  
Recovery

**Permanent Fund**  
Endowment only interest  
used in SHARE or other  
distributions

**Benefactor**  
\$1,000 pledge  
to PF

**Bequest  
Society**  
\$10,000 pledge

**Major Donor**  
\$10,000 cash

**Arch Klump  
Society**  
\$250,000

**EREY**  
Every Rotarian  
Every Year  
any contribution

**Sustaining  
Member**  
\$100/yr

**Paul Harris  
Fellow**  
\$1,000

**Paul Harris  
Society**  
\$1,000/yr to  
APF or Polio

## \$\$ Support \$\$

Individual Rotarians, Clubs, Districts, Corporate Matching  
Gifts, Other Foundations, Trusts, Insurance, Estate Plans,  
and Friends

## Disbursements

**District Designated  
Fund (DDF)**

Use up to 50% of funds from Annual  
Fund 3 years prior

**World Fund  
(General)**

**World Fund (Matching)**

Matches 100% of DDF funds and  
50% of cash donations toward  
specific projects

### District Grants

Small-scale, short-  
term activities  
chosen by each  
District. Supporting:

- Humanitarian projects
- Scholarships of any level, length, or area of study
- Vocational training

### Contributions

- Peace Centres
- PolioPlus
- Peace Fellowships

### Global Grants

Supports large international  
activities with sustainable,  
measurable outcomes in 6  
Areas of Focus.

- Humanitarian projects
- Scholarships at graduate-level
- Vocational Training teams

## \$\$ Beneficiaries \$\$

Rotarians, Clubs, Districts, International Partners,  
Scholars, Communities, Families, Children



*has been awarded*



*for 12 Consecutive Years*

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

2008





Charity Contact Info

The Rotary Foundation of  
Rotary International

One Rotary Center  
1560 Sherman Avenue  
Evanston, IL 60201  
tel: (866) 976-8279  
fax: (847) 328-8554  
EIN: 36-3245072

Mail donations to:  
14280 Collections Center Drive  
Chicago, IL 60693

[Visit Web Site](#)

Board Leadership

K.R. Ravindran  
Chair

CEO

John Hewko  
General Secretary

Rating Profile Table of Contents

[Overall Score & Rating](#)

[Mission](#)

International : [International Peace, Security, and Affairs \(Grantmaking/Grants Payable\)](#)

# The Rotary Foundation of Rotary International

Enabling Rotarians to advance world understanding, goodwill, and peace

[Add to My Charities](#)

[Donate to this Charity](#)

[Print](#)

SHARE



[Rating Profile](#)

[Programs](#)

[Historical Ratings](#)

[IRS \(Forms 990\)](#)


## Ratings History

The Rotary Foundation of Rotary International has received 12 consecutive 4-star ratings from Charity Navigator.

Form 990 FYE	Date Published	Overall Score	Overall Rating
<b>CN 2.1</b>			
2018-06	08/01/2019	100.00	★★★★
2017-06	12/01/2018	97.51	★★★★
2016-06	12/01/2017	100.00	★★★★
2015-06	11/01/2016	97.87	★★★★
2014-06	09/01/2016	100.00	★★★★
2014-06 ⓘ	06/01/2016	97.17	★★★★



## **STEWARDSHIP IS WHO WE ARE**



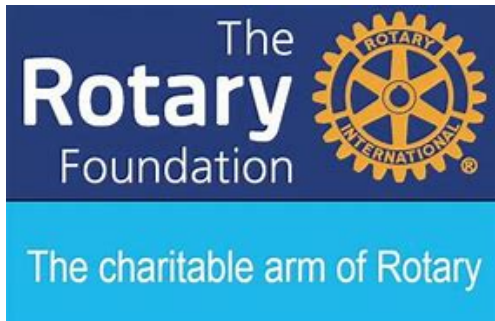
**Managing Your  
Donations**

**Assuring Grant  
Quality**

**Ensuring  
Impact**

**Stewardship is not a single action – it is a value  
that links staff and volunteers.**

# Why Giving to Annual fund is important for All Rotarians?



Fundraising  
building block  
of our  
Foundation

Primary source  
of support for  
TRF activities

Funds are Rotarian driven  
Global and District grants

The **Rotary Foundation** transforms your gifts into service projects that change lives both close to home and around the world-From projects from Rotarians around the world

## OUR CAUSES-the reason to give-6 areas of Focus



Promoting  
peace

Fighting  
disease

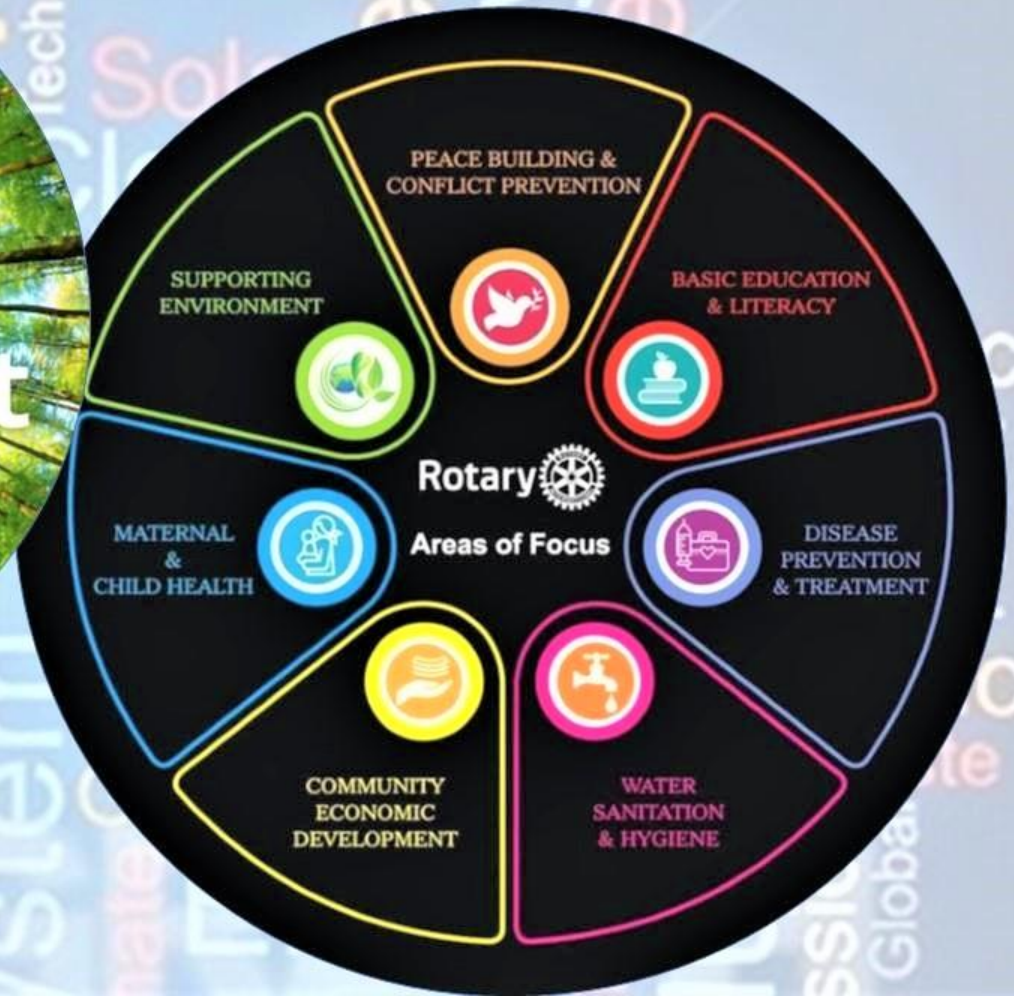
Providing  
clean  
water

Saving  
mothers  
and  
children

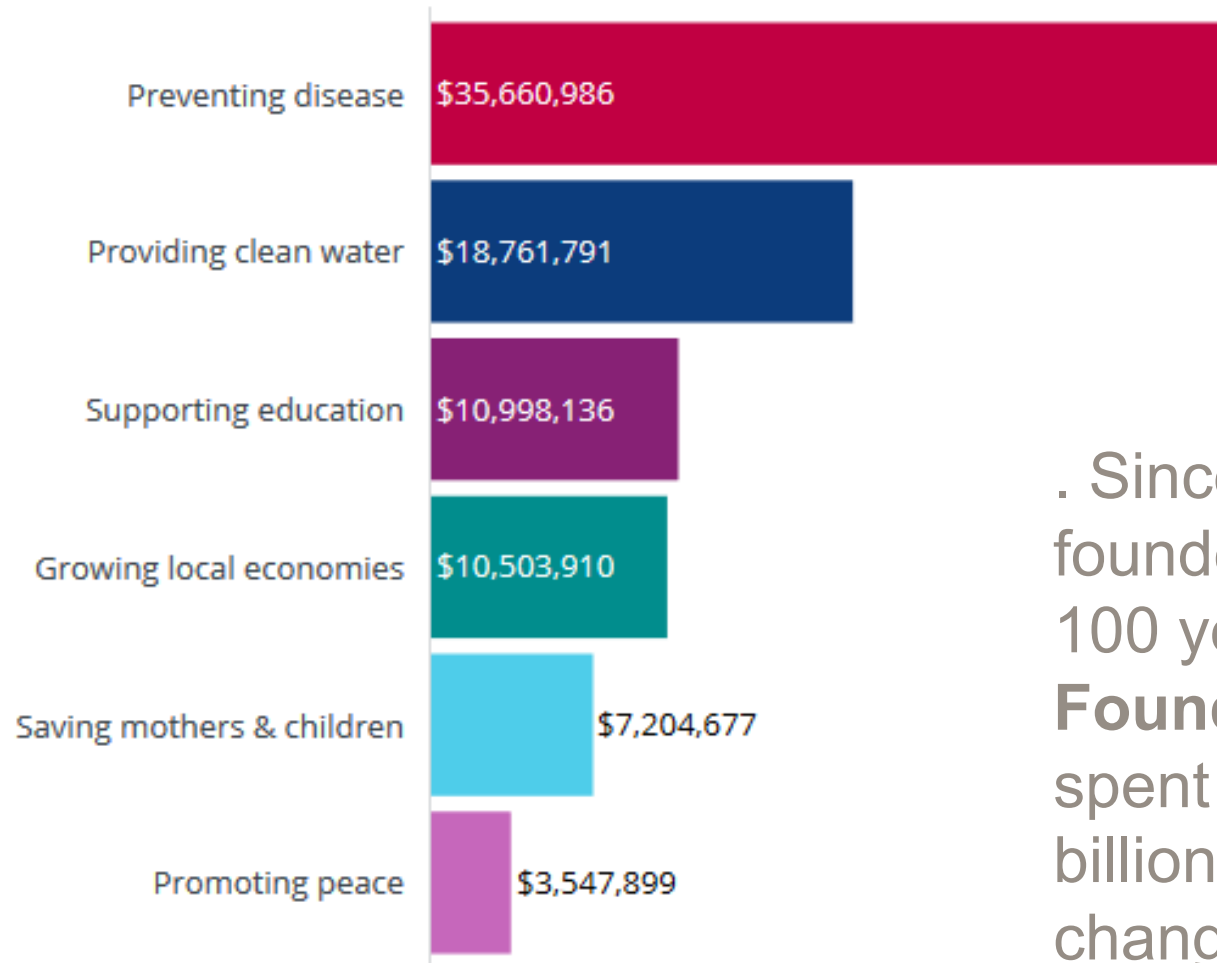
education

Growing  
local  
economies





The Foundation awarded \$86,677,399 in funding to 1,306 grants during fiscal year 2018. Here is a breakdown of causes the grants supported.



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





# Ambassadorial Scholarships of the Rotary Foundation

<https://www.youtube.com/watch?v=TmBILg2j9WE>





## **Rotary Foundation Ambassadorial Scholarship Program**

- The Rotary Foundation's oldest and best-known program is Ambassadorial Scholarships.
- The program has enabled nearly 37,000 men and women from 100 different nations to study abroad since its inception in 1947.
- Applicants express their commitment to furthering international understanding and serving as ambassadors of Rotarian goodwill in their host countries.
- Compared to other scholarships, the Ambassadorial Scholarship is the only one providing scholars with a full network of support

# ROTARY SCHOLARSHIP PROGRAMS





# Congratulations to Harrison Brown on the \$5K Rotary district scholarship –Rotary Club of Albion





# Cluster Grants



## Mask Cleaning Machine-Global Grant-In St. Catharines Ontario Canada



RC St. Catharines, RC St. Catharines Lakeshore, RC Welland, RC Pato Branco, Brazil, RC Grigota Santa Cruz, Bolivia, RC St. Maarten, RC St. Maarten Mid-Isle



## Funding

Tell us about the funding you've secured for your project. We'll use the information you enter here to calculate your maximum possible funding match from the World Fund.

#	Source	Details	Amount (USD)	Support*	Total
1	District Designated Fund (DDF)	7090	10,000.00	0.00	10,000.00
2	Cash from Club	Grigota	477.00	23.85	500.85
3	Cash from Club	St. Catharines	22,482.00	1,124.10	23,606.10
4	Cash from Club	Pato Branco-Amizade	2,829.00	141.45	2,970.45
5	Cash from Club	Welland	690.00	34.50	724.50
6	Cash from Club	St. Catharines-Lakeshore	690.00	34.50	724.50

\*Whenever cash is contributed to the Foundation to help fund a global grant project, an additional 5 percent is applied to help cover the cost of processing these funds. Clubs and districts can receive Paul Harris Fellow

recognition points for the additional expense.

### How much World Fund money would you like to use on this project?

You may request up to 23,584.00 USD from the World Fund.

23584

### Funding Summary

<b>DDF contributions:</b>	10,000.00
<b>Cash contributions:</b>	27,168.00
<b>Financing subtotal (matched contributions + World Fund):</b>	60,752.00
<b>Total funding:</b>	60,752.00
<b>Total budget:</b>	60,752.00

# WHAT IS A VOCATIONAL TRAINING TEAM (VTT)?



A VTT is a group of professional who travel to another country either to learn more about their profession or to teach local professionals about a particular field



Formerly group study exchange started in 1965





Club  
sponsored  
humanitarian  
projects



  
**FOOD4KIDS**  
Ontario





Generates District designated funds (DDF)



The  
**Rotary**  
Foundation



EVERY  
ROTARIAN  
EVERY  
YEAR

Designated contributions through the Every Rotarian, Every Year (EREY) campaign remain crucial to Success of District Designated Fund and more

# A little can you a long way to changing people's lives

## **\$10 MOSQUITO BED NET**

Bed nets provide a safe, peaceful night's rest in countries like Uganda, where malaria is a major health concern.



## **\$50 WATER FILTER**

In rural Guatemala, deadly waterborne illnesses are common. Personal water filters fill the basic need for clean water.



## **\$500 ANTI-BULLYING CAMPAIGN**

No child should live in fear of being bullied. Your gift helps communities create a safe and positive atmosphere where children can thrive.



## **\$26.50 BOOKS**

Share your love of reading by giving the gift of books to start libraries in classrooms and community centers around the world.



## **\$100 SEWING MACHINE**

Within Rotary microfinance training, sewing machines are used to show entrepreneurs how to turn sewing skills into a business.



## **\$1,000 MIDWIFE VOCATIONAL TRAINING**

In remote areas, midwives provide vital prenatal care. Mothers who receive care during pregnancy are more likely to have safe births and to seek medical care for their children.



Sustaining Member

Rotary



# What \$ 100 can do





## ACHIEVING EREY SUCCESS-Every Rotarian Every Year-\$25.00 USD

- **People give because they are asked to give**
- **Share Foundation message with everyone-facebook**
- **Share the Foundation's charity ratings**
- **Club recognition tells potential members about your members success in donations-fellows,banners**
- **Tell the story of Rotary-local projects to all members**
- **People give to people**
- **Tax Deduction**
- **Sign up for Rotary Direct-easiest way**

I Believe in investing in Rotarians knowledge around the world.

- Needs identified and implemented by Rotarians
- Local and International Activities
- Global network of compassionate volunteers
- Rotarians Driven



**I WANT  
TO END  
POLIO.  
JOIN ME.**

Think of all the lives  
saved since we  
started to eradicate  
polio



Since 1988 more than  
850,000 deaths from  
polio have been  
prevented





**Think of all the lives we have changed by not living with a crippling disease**

**Since 1988 polio vaccine has prevented more than 19 million cases of paralysis**



***Countries with active polio cases in 1988.***



***Polio 2020  
Only Afghanistan & Pakistan remain endemic.***



# The Plus in Polio Plus



- Contract Tracing
- Water in villages
- cold chain
- microplanning
- Surveillance
- Jobs





# GETTING VACCINE TO CHILDREN



Rotary



**POLIO  
IS ONLY  
A PLANE  
TRIP AWAY**



**END  
POLIO  
NOW**

**IS A COMMITMENT  
NOT A DREAM**



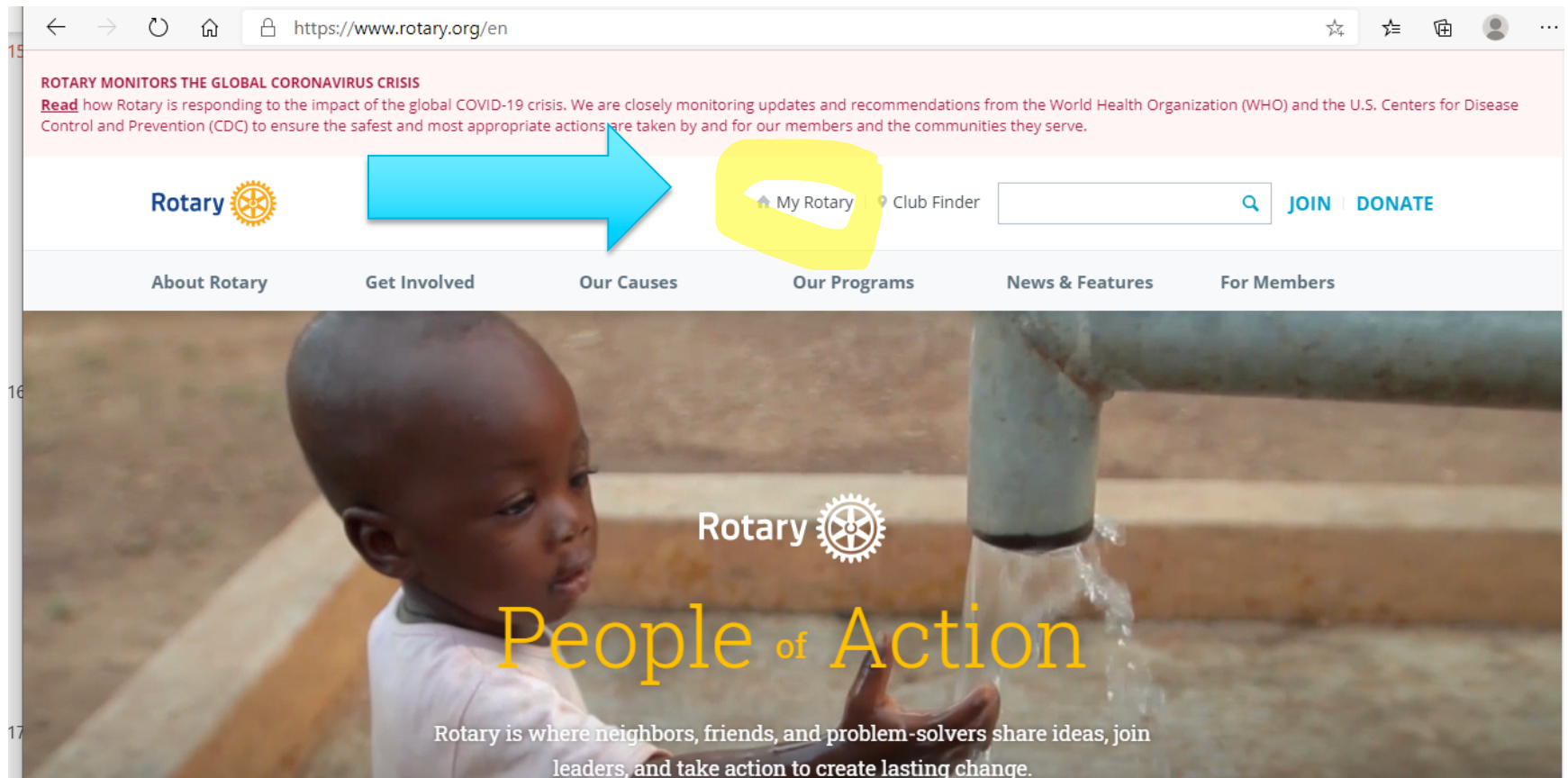
# ROTARY DIRECT



- Rotary's recurring giving program
- Give monthly, quarterly, or annually
- Enroll online or using the paper enrollment form




Log on to Rotary.org -----let's see what we can find




The screenshot shows the Rotary.org website. At the top, a pink banner reads "ROTARY MONITORS THE GLOBAL CORONAVIRUS CRISIS" and provides a link to read more about the organization's response to the COVID-19 crisis. Below this, the main navigation bar features the Rotary logo, a blue arrow pointing to the "My Rotary" link, a yellow circle around the "Club Finder" link, a search bar, and "JOIN | DONATE" buttons. A secondary navigation bar lists "About Rotary", "Get Involved", "Our Causes", "Our Programs", "News & Features", and "For Members". The main content area features a large image of a young child reaching for water from a public tap. Overlaid on this image is the text "Rotary People of Action" and a tagline: "Rotary is where neighbors, friends, and problem-solvers share ideas, join leaders, and take action to create lasting change."

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ROTARY MONITORS THE GLOBAL CORONAVIRUS CRISIS  
**Read** how Rotary is responding to the impact of the global COVID-19 crisis. We are closely monitoring updates and recommendations from the World Health Organization (WHO) and the U.S. Centers for Disease Control and Prevention (CDC) to ensure the safest and most appropriate actions are taken by and for our members and the communities they serve.

Rotary 

My Rotary Club Finder   JOIN | DONATE

About Rotary Get Involved Our Causes Our Programs News & Features For Members

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People of Action

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Rotary is where neighbors, friends, and problem-solvers share ideas, join leaders, and take action to create lasting change.

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Share with: English (Canada)

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Donate

Join



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### Rotary monitors the global coronavirus crisis

Rotary is closely monitoring updates and recommendations from the World Health Organization (WHO) and the U.S. Centers for Disease Control and Prevention (CDC) to ensure the safest and most appropriate actions are taken for our members. [Read the latest](#) on how the COVID-19 outbreak is impacting Rotary operations, events, and members.

You have been signed in as *sandichard@gmail.com*.



# Donate

All fields are required unless marked *optional*.

## Choose what you would like to support

### Featured Causes

### Areas of Focus

### Endowment

### Global Grants

Contributions to these featured causes are eligible for Paul Harris Fellow recognition.



### Annual Fund

[Learn more](#)



### Polio Fund

[Learn more](#)



### World Fund

[Learn more](#)



### Disaster Response Fund

[Learn more](#)

☐ I would like to make this donation in honor or in memory of someone

## Donation

Select your country

Canada



Select your currency

Canadian Dollar



Select a donation type



One-time donation



Recurring donation

Select an amount

In Canada we recommend you use Canadian \$\$

### Select a donation type



One-time donation



Recurring donation

### Choose frequency

Quarterly



### Choose start date

October



Your quarterly donations will occur the first week of October, January, April, and July.

### Select an amount

CAD



25

CAD



100

CAD



250

CAD



500

CAD



Other

Recognition amount in USD: 190.84



133 Lakeshore Rd.

Address Line 2 (optional)

Address Line 3 (optional)

L2N 2T8

ON

St. Catharines

Canada



REVIEW MY DONATION

SUBMIT

## Personal information

Sandi

Chard

905-646-9380

sandichard@gmail.com

## Payment Details


Credit Card

# I need to make a change to by Rotary Direct

← → ↻ 🏠 <https://my.rotary.org/en/user/donations/management> ... 🔒 ☆ 🔍 Search

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- My Profile
- My Donations
- My Account Actions
- Account Settings
- Sign Out

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You have been signed in as





[Have a question?](#)  
[Visit our FAQ.](#)

### View Your Contribution History

Click on the report name that you want to view. You will see a report opening in a new window or tab.

#### Individual Reports

- [Donor History Report](#)

Please note: Contribution data updates may take up to 4-6 days to be reflected on the reports upon receipt by RI. During peak periods, it may take 8-11 days to be reflected.

# Donor Self-Service

Profile

Delegation

Connections (0)

Messages (0)

Account Settings

Donor Self-Service

## Donor Self-Service

Update your credit card information or other details of your recurring gift arrangement, make up a missed payment, or cancel your recurring donation.

### Donor History Report

View all of your contributions, commitments, recognition, and Foundation recognition point transfers. Use this report to reconcile your contributions or review your recognition level.

### Individual Contribution Form

Print and use this form if you or someone you know wishes to send a contribution to The Rotary Foundation or to use Foundation recognition points to name someone a Paul Harris Fellow.

## Your active recurring donations

Note that changing the information below will not update your My Rotary profile.

Annual Fund   Quarterly   50 CAD		
Donation	Personal information	Payment details
Support	Name	Payment method

## Donation

### Support

Annual Fund

### Frequency

Monthly

### Next charge date

First week of October 2020

### Amount (CAD)

25

EDIT

[Make up a missed payment](#) ⓘ

[Cancel recurring donation](#)

Add a new recurring donation

ADD

## Personal information

### Name

Sandi Chard

### Phone

1 9056469380

### Email

sandichard@gmail.com

## Payment details

### Payment method

American Express ending in 1019

### Expiration date

05/23

### Billing address

133 Lakeshore Rd.  
St. Catharines, ON L2N 2T8  
Canada



# Yes you can still send in the mail



## Donor Self-Service

[Profile](#) [Delegation](#) [Connections \(0\)](#) [Messages \(0\)](#) [Account Settings](#) **[Donor Self-Service](#)**

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Annual Fund | Quarterly | 50 CAD

Donation

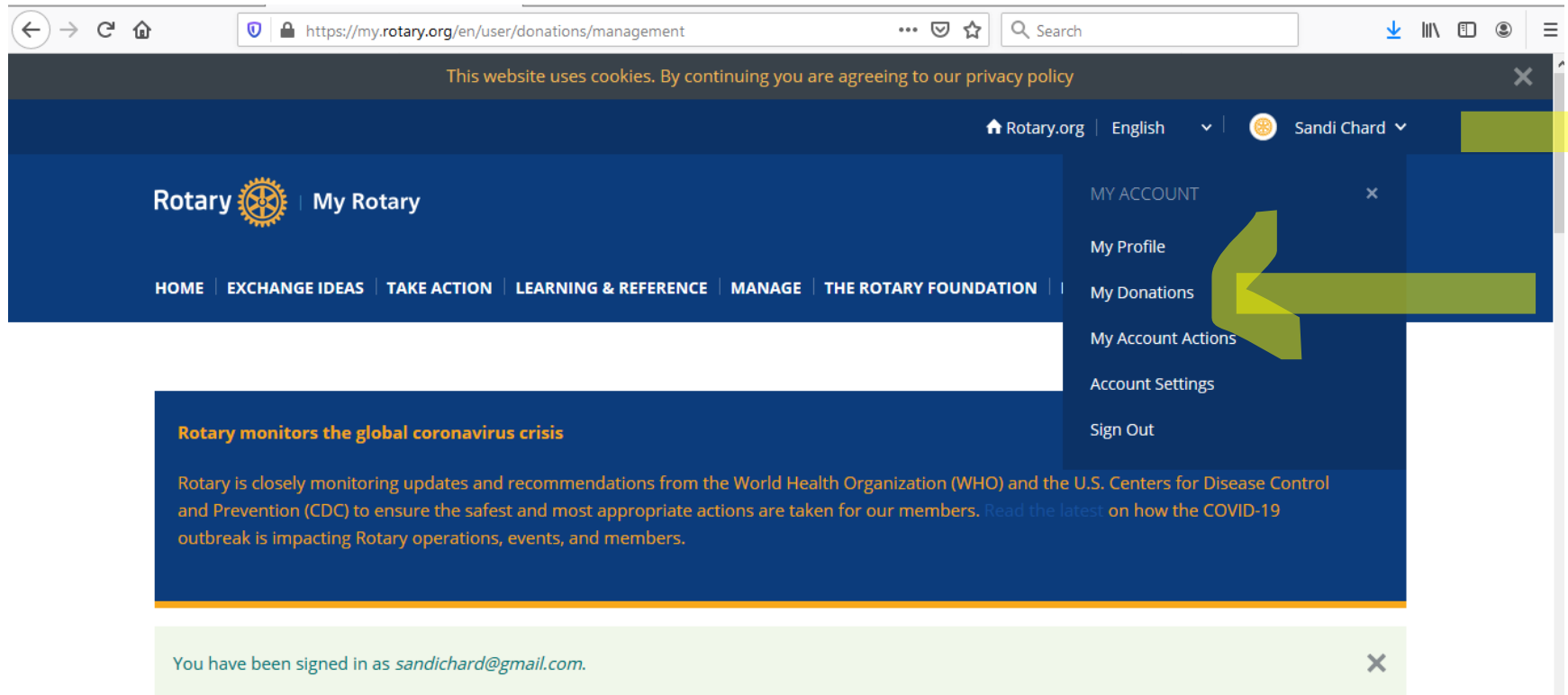
Personal information

Payment details

Support

Name

Payment method



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[Profile](#) [Delegation](#) [Connections \(0\)](#) [Messages \(0\)](#) [Account Settings](#) **[Donor Self-Service](#)**

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Annual Fund   Quarterly   50 CAD		
Donation	Personal information	Payment details
Support	Name	Payment method





ROTARY INTERNATIONAL®  
THE ROTARY FOUNDATION®

## Donor History Report

Date: 09 September 2011

### Recognition

#### Type

Major Donor or AKS :

Major Donor Level 1

Bequest Society :

No

Benefactor :

Yes

Paul Harris Fellow :

PHF+8

PHF Recognition Amount :

22,411.68

Foundation Recognition Points :

10,125.00

(Available for transfer)

Paul Harris Society Eligible

Current Year	Last Year
Yes	Yes
Yes	Yes
Yes	Yes

Sustaining Member

Every Rotarian Every Year

### Gifts

#### Type

Annual Programs Fund - SHARE

\$6,440.00

Annual Programs Fund

\$6,440.00

Adjustment

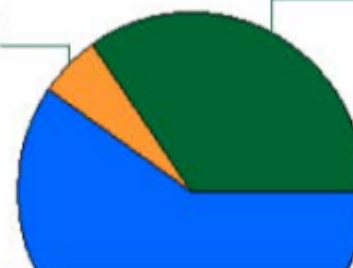
\$3,050.00

Adjustment

\$3,050.00

Total

Permanent  
Fund  
5.41%



Annual  
Programs  
Fund  
34.83%



Overview

Transaction Detail

Figure 1: Example of a donor history report

## Transaction Detail

Date	Type	Designation	Notes	Contribution	Transfer	Credit Organization
03-Sep-2020	Contribution	PolioPlus Fund - PolioPlus		\$25.00		St. Catharines-Lakeshore (23879)
09-Jul-2020	Contribution	PolioPlus Fund - PolioPlus		\$18.25		St. Catharines-Lakeshore (23879)
02-Jul-2020	Contribution	Annual Fund - SHARE		\$36.50		St. Catharines-Lakeshore (23879)
10-Apr-2020	Contribution	Annual Fund - SHARE		\$35.71		St. Catharines-Lakeshore (23879)
02-Apr-2020	Contribution	Annual Fund - SHARE		\$35.71		St. Catharines-Lakeshore (23879)
02-Feb-2020	Contribution	Annual Fund - SHARE		\$18.94		St. Catharines-Lakeshore (23879)
02-Jan-2020	Contribution	Annual Fund - SHARE		\$38.16		St. Catharines-Lakeshore (23879)
02-Dec-2019	Contribution	Annual Fund - SHARE		\$18.80		St. Catharines-Lakeshore (23879)
02-Nov-2019	Contribution	Annual Fund - SHARE		\$19.08		St. Catharines-Lakeshore (23879)
02-Oct-2019	Contribution	Annual Fund - SHARE		\$37.60		St. Catharines-Lakeshore (23879)
02-Sep-2019	Contribution	Annual Fund - SHARE		\$18.80		St. Catharines-Lakeshore (23879)
17-May-2019	Transfer Out		Sandi Chard --> Else Weeks		500	
02-May-2019	Contribution	Annual Fund - SHARE		\$18.66		St. Catharines-Lakeshore (23879)
02-Apr-2019	Contribution	Annual Fund - SHARE		\$37.32		St. Catharines-Lakeshore (23879)
02-Mar-2019	Contribution	Annual Fund - SHARE		\$18.94		St. Catharines-Lakeshore (23879)
02-Feb-2019	Contribution	Annual Fund - SHARE		\$18.66		St. Catharines-Lakeshore (23879)
02-Jan-2019	Contribution	Annual Fund - SHARE		\$37.04		St. Catharines-Lakeshore (23879)
03-Dec-2018	Contribution	Annual Fund - SHARE		\$18.94		St. Catharines-Lakeshore (23879)
01-Nov-2018	Contribution	Annual Fund - SHARE		\$19.08		St. Catharines-Lakeshore (23879)
01-Oct-2018	Contribution	Annual Fund - SHARE		\$38.76		St. Catharines-Lakeshore (23879)
04-Sep-2018	Contribution	Annual Fund - SHARE		\$19.23		St. Catharines-Lakeshore (23879)
01-Aug-2018	Contribution	Annual Fund - SHARE		\$18.94		St. Catharines-Lakeshore (23879)
05-Jul-2018	Contribution	Annual Fund - SHARE		\$37.60		St. Catharines-Lakeshore (23879)
01-Jun-2018	Contribution	Annual Fund - SHARE		\$19.38		St. Catharines-Lakeshore (23879)
01-Jun-2018	Recognition		PHF+2			
16-May-2018	Transfer Out		Sandi Chard --> Linda Jones		180	

## Other ways to Give



**Leave a donation to The Rotary Foundation's  
Endowment Fund.**





# Benefactors & Bequest Society

- A **Benefactor** is an individual or couple that has made a **provision in their estate plan** to gift a minimum US \$1,000 to The Rotary Foundation, or made **an outright gift** of US\$1,000 to the Permanent Fund.



- A **Bequest Society** member is an individual or couple that has made a provision in their estate plan totaling US \$10,000 or more to TRF.
- Examples are living wills or whole and universal life insurance policies.



- a gift in a Will can turn that ordinary Rotarian into an extraordinary philanthropist
- If only 3.5% more ordinary Canadians included a gift in their Will in the coming decade, the estimate is this would result in \$40 billion dollars being directed to charitable causes
- Leaving a gift to charity in your estate can be as easy as adding a clause to your Will. –Rotary International has the forms
- a gift in a Will can help your family feel part of the impact you are making now with Rotary and will in the future world
- We encourage you to involve your loved ones in your decision. Make it about celebrating who you are, the values you hold, and the life you lead.

### Bequest Society \$10,000 Pledge



Recognition consists of an engraved crystal recognition piece and a pin

**Multiple Paul Harris Fellow**

### Benefactor \$1,000 to Endowment Fund



Recognition consists of a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin



## CLUB BANNER RECOGNITION-Happy Presidents receiving awards club working today







# INDIVIDUAL DONOR RECOGNITION

**Multiple Paul Harris Fellows receive pins with additional stones. Recognition levels are based on the following guidelines:**

## Recognition total

US\$2,000 to 2,999.99

3,000 to 3,999.99

4,000 to 4,999.99

5,000 to 5,999.99

6,000 to 6,999.99

7,000 to 7,999.99

8,000 to 8,999.99

9,000 to 9,999.99



## Pin level

one sapphire

two sapphires

three sapphires

four sapphires

five sapphires

one ruby

two rubies

three rubies



Paul Harris Fellow



Major Donor

# Clubs-together-Grant Island Hamilton AM-

Approximately 60 members

4-Rotary direct

16-EREY-\$25 USD-Annual Fund

11-Sustaining \$100 USD –Annual Fund

AVG for district is \$109- both significantly lower

35 Paul Harris Fellows

5 benefactors society

2 bequest

2 major donors

Donated to Foundation \$523909

# Thank You for Doing Good in the World.



# ANNUAL FUND



**Sandi Chard**

**[sandichard@gmail.com](mailto:sandichard@gmail.com)**

**905-646-9380**