

# Rotary Foundation Basics

## HISTORY

At the 1917 convention, outgoing RI President Arch C. Klumph proposed to set up an endowment “for the purpose of doing good in the world.” In 1928, it was renamed The Rotary Foundation, and it became a distinct entity within Rotary International.

In 1929, the Foundation made its first gift of \$500 to the International Society for Crippled Children. The organization, created by Rotarian Edgar F. “Daddy” Allen, later grew into Easter Seals.

When Rotary founder Paul Harris died in 1947, contributions began pouring in to Rotary International, and the Paul Harris Memorial Fund was created to build the Foundation.

## GUIDING PRINCIPLES

For more than 100 years, our guiding principles have been the foundation upon which our values and tradition stand. The Four-Way Test, Object of Rotary, and the Avenues of Service express our commitment to service, fellowship, diversity, integrity, and leadership.

## AREAS OF FOCUS

The Rotary Foundation directs its efforts in six areas to enhance the local and global impact. The most successful and sustainable projects and activities tend to fall within the following areas:

- Promoting peace
- Fighting disease
- Providing clean water
- Saving mothers and children
- Supporting education
- Growing local economies

The Rotary Foundation transforms your gifts into projects that change lives both close to home and around the world. As the charitable arm of Rotary, it taps into a global network of Rotarians who invest their time, money, and expertise into our priorities, such as eradicating polio and promoting peace. Foundation grants empower Rotarians to approach challenges such as poverty, illiteracy, and malnutrition with sustainable solutions that leave a lasting impact.

Strong financial oversight, a stellar charity rating, and a unique funding model mean that the Foundation makes the very most of your contribution. Give and become a part of Rotary’s life-changing work!

## HOW TO DONATE

- **Recurring Giving (Rotary Direct)** - You choose how much and how often
- **Check, Draft, or Wire Payments**
- **Securities**
- **Planned Giving**- structure your charitable gift to provide tax and other financial benefits,
- **Named Gift**- you can designate a specific name for your contribution.

- **Donor Advised Funds** - You make contributions and recommend grants to the Foundation and other preferred charities
- **Personal Property** - gifts of tangible property, such as jewelry or artwork, with the approval of the Gift Acceptance Committee.
- **Real Estate**- gifts of real estate with a minimum appraised value of \$25,000 (undeveloped property) and \$100,000.
- **Employee Matching Gift**- Double the impact of your gift by asking your employer to match your contribution to The Rotary Foundation.
- **Rotary Credit Card** - Support the Rotary Foundation with the Rotary International credit card.
- **Airline Miles**

## **WHERE TO DONATE**

### **The Annual Fund**

Annual Fund contributions help support our humanitarian activities, from local service projects to global initiatives.

Contributions to the Annual Fund will continue to be divided, with 50 percent allotted to District Designated Funds (DDF) and 50 percent to the World Fund. DDF allocations will not be changed in any way.

Your Rotary club or district can apply for grants from the Foundation to invest in projects and provide scholarships, all made possible through the ongoing financial support of Every Rotarian, Every Year.

### **PolioPlus Fund**

Rotarians have helped immunize more than 2 billion children against polio in 122 countries. For as little as \$0.60, a child can be protected against this crippling disease for life. Your gift to the PolioPlus Fund is eligible for Paul Harris Society recognition. You can maximize support for polio eradication within your club and your community by organizing a fundraiser. Get some ideas.

### **Term Gifts**

Rotarians and friends can choose to make a gift that is expended, generally the following year, on a global grant or for the Rotary Peace Centers. Term gift naming opportunities include:

### **The Endowment Fund**

Rotary's Endowment Fund ensures a strong future for the Foundation. Spendable earnings from the fund supplement the Annual Fund and support Rotary's highest priorities in perpetuity. The Foundation has set a goal of \$1 billion for the Endowment Fund by 2017, ensuring its ability to meet current and future needs.

### **Share**

You can designate the spendable earnings from your endowed gift to SHARE, which makes a portion available to support, club, and district projects.

### **World Fund**

The World Fund provides the necessary funding for our highest priority activities around the globe. Fifty percent of SHARE-designated contributions are applied to the World Fund. You can also designate the spendable earnings from your endowed gift entirely to the World Fund, to be used for critical activities.

## **ROTARIAN GIVING**

\$1000 / year **Paul Harris Society** – A Rotarian donates to either the Annual Fund or PolioPlus

\$100 / year – **Sustaining member** - A Rotarian donates each year to either the Annual Fund or PolioPlus

EREY – **Every Rotarian Every Year** – Each Rotarian agrees to contribute any amount, but agrees to do it each year.

## **RECOGNITION**

Paul Harris Fellow – Earned or given based on \$1000 contribution to either the Annual Fund or PolioPlus

Multiple Paul Harris Fellows – Designated by multiple jewels in the pin

Major Donor – A total combined donation to the Annual Fund or PolioPlus

Level 1 - \$10,000

Level 2 - \$25,000

Level 3 - \$50,000

Level 4 - \$100,000

Arch Klumph Society

Trustees Circle - \$250,000

Chair's Circle - \$500,000

Foundation Circle - \$1,000,000

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.

Bequest Society - The Rotary Foundation recognizes couples or individuals who have made commitments in their estate plans totaling \$10,000 or more.

Level 1 - \$10,000

Level 2 - \$25,000

Level 3 - \$50,000

Level 4 - \$100,000

Level 5 - \$250,000

Level 6 - \$500,000

Level 7 - \$1,000,000

## **PORTLAND ROTARIAN GIVING**

\$1000 / year **Paul Harris Society** – A Rotarian donates to either the Annual Fund or PolioPlus

\$200 / year – **Circle of Five** - A group of five Rotarians each agree to donate \$200/year. By lottery, one of the five receives a Paul Harris Fellow each year. At the end of five years, all have received a Paul Harris Fellow. This is a NE US tradition. We adopted it from another club in our district

\$100 / year – **Sustaining member** - A Rotarian donates each year to either the Annual Fund or PolioPlus

EREY – **Every Rotarian Every Year** – Each Rotarian agrees to contribute any amount, but agrees to do it each year.

**Employee Matching Gift-** Double the impact of your gift by asking your employer to match your contribution to The Rotary Foundation. Many Portland Rotarians do this.

**PORTLAND ROTARIAN RECOGNITION**

Sustaining Members – Yellow dots on name badges

Paul Harris Fellow – Pins

Multiple Paul Harris Fellows – Pins with multiple jewels

Paul Harris Society- Special recognition pin

Benefactor

Bequest Society

**Portland 100<sup>th</sup> Anniversary**

In recognition of Portland Rotary’s 100<sup>th</sup> year, the Foundation committee is asking every Portland Rotarian to give \$100 more than normal this year. This will make Portland Rotary a 100% Sustaining Member club, and much much more.

Thanks for your kind attention, and please consider giving an extra \$100 this year.

**Additional Information Link**

[PDF] [ROTARY FOUNDATION REFERENCE GUIDE](#)

<https://www.rotary.org/myrotary/en/document/rotary-foundation-reference-guide>



1 Paul Harris Fellow (PHF) pin,	5 Foundation logo
2 Multiple Paul Harris Fellows	6 Bequest Society member
3 Paul Harris Society member	7 Major donor
4 Benefactor.	8 Rotary crystals for each level of donation for major donors and Bequest Society members