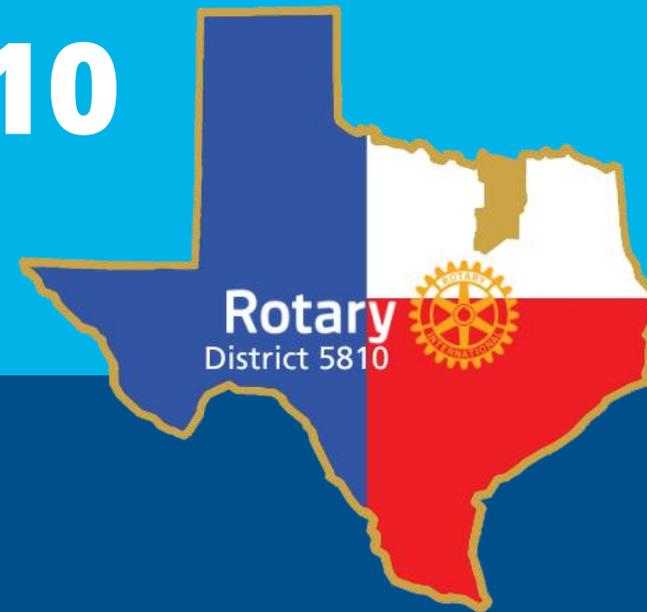


# ROTARY DISTRICT 5810

FOCUS ON FOUNDATION



# FOUNDATION COMMITTEE TRAINING

About Rotary

[VIEW](#)

Club Leadership

[VIEW](#)

District Leadership

[VIEW](#)

General

[VIEW](#)

Membership

[VIEW](#)

Professional  
Development

[VIEW](#)

Public Image

[VIEW](#)

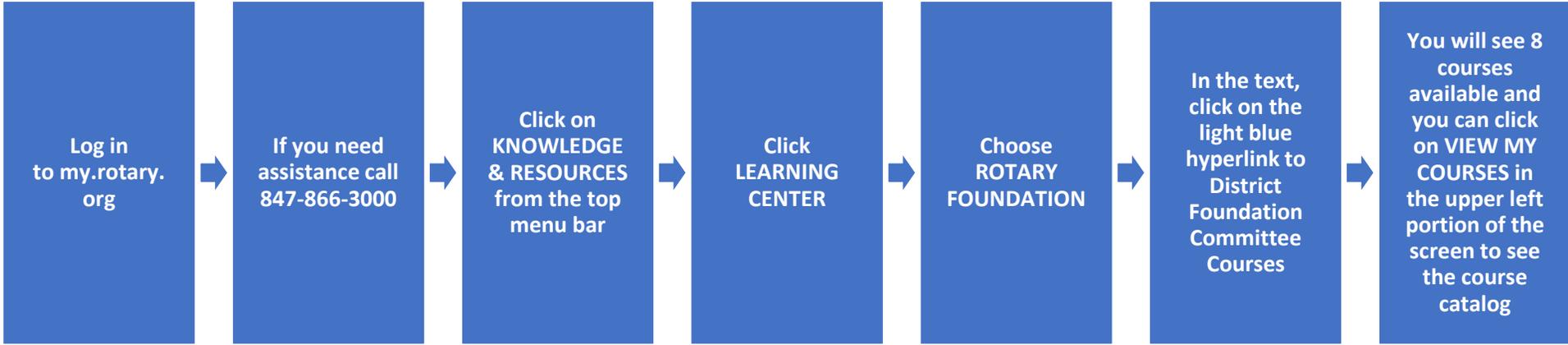
Service

[VIEW](#)

The Rotary Foundation

[VIEW](#)

# FOUNDATION COMMITTEE TRAINING





**CREATE HOPE**  
in the **WORLD**

**FOUNDATION TEAM**  
**2023-2024**

---

# District Foundation Committee Chair

- Coordinate and promote all district fundraising and program participation.
- Help the district governor conduct a district Rotary Foundation seminar.
- Work with the district training committee to customize and hold Foundation sessions at the presidents-elect training seminar and district training assembly.
- Encourage clubs to offer at least two programs about the Foundation each year, including one in November, Rotary Foundation Month.
- Encourage annual and major gifts to our Foundation.
- Work with the governor and governor-elect to decide how to distribute the District Designated Fund (DDF) and authorize use of funds for grants.
- Encourage clubs to set fundraising goals in Rotary Club Central.
- Qualify the district and implement the district Memorandum of Understanding (MOU). Ensure that reports are submitted on time.
- Hold grant management seminars and qualify clubs for Foundation grants.
- Be the primary contact to help with grant resources, application reviews, and project funding approvals.
- Help choose qualified recipients for Foundation awards.

## PDG Bill Dendy



# Legacy Society Chair

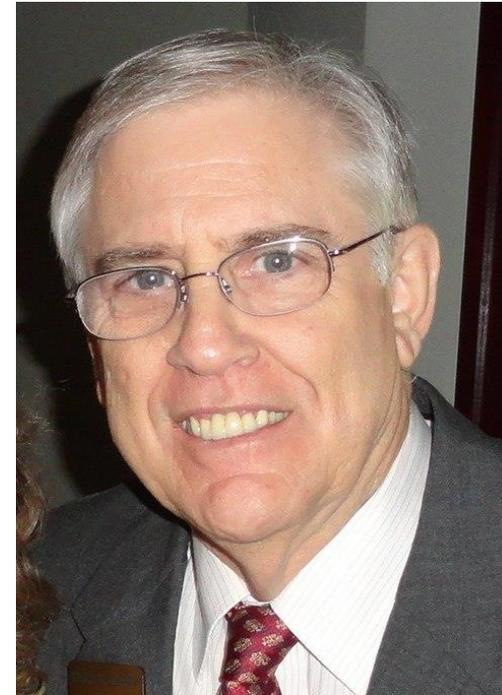
**Kathy Allred**

- Encouraging and recognizing those who make contributions to the Rotary Foundation

# Annual Fund Chair

## PDG Richard Gilman

- Advise clubs on setting fundraising goals and strategies to achieve them.
- Organize club and district fundraising activities.
- Motivate and advise clubs on all Foundation fundraising initiatives, and promote the initiatives.
- Coordinate district donor appreciation events.



# Benefactor & Bequest Society Chair

- Establish district Benefactor, Bequest Society, and major gift goals through Rotary Club Central.
- Inform Rotarians of planned giving opportunities by using resources like [Your Rotary Legacy](#).
- Work with presidents to recognize Benefactors and Bequest Society members.
- Coordinate efforts with the Annual Fund subcommittee chair, if applicable.
- Coordinate the identification, cultivation, solicitation, and stewardship of potential donors to the Endowment Fund.
- Work with endowment/major gifts advisers, and gift and estate planning professionals.

## PDG Max Duplant



# Major Donor Chair

## Greg Pape



- Encouraging and recognizing those who make contributions of \$10,000 or more to the Rotary Foundation
- Coordinate and plan the Major Donor Dinner.

# Paul Harris Society Chair

- Collaborate with zone and district leaders to identify Rotarians and friends of Rotary who have the commitment and financial capacity to support the Foundation at the Paul Harris Society level.
- Facilitate meaningful and appropriate recognition of society members.
- Award Paul Harris Society chevrons to new Paul Harris Society members at club or district events such as club meetings, Foundation dinners, and Foundation receptions.
- Use Foundation reports to identify prospective members, thank members who have fulfilled their annual commitment, and remind those who have not.

## John Moser



# PolioPlus Subcommittee Chair

- Organize at least one PolioPlus district fundraiser per year.
  - Work with the Foundation committee chair, district public image committee, and the governor to recognize exemplary activities related to polio eradication.
- 
- Help the governor and district trainer on PolioPlus presentations during Foundation training.
  - Coordinate with national and regional PolioPlus committees and governmental and other agencies on polio eradication activities.
  - Offer guidance on District Designated Fund distribution.

## Ross Rolirad



# Grants Subcommittee Chair

- Abide by the terms and conditions of awards for district and global grants; train clubs on their responsibilities under the terms and conditions.
- Work with the district Rotary Foundation committee chair to create and carry out a district policy to fund grants, and ensure that proper records of grant activities are kept.
- Work with the stewardship subcommittee to ensure good financial and management practices, including reporting, for all grants.
- Offer guidance on District Designated Fund distribution

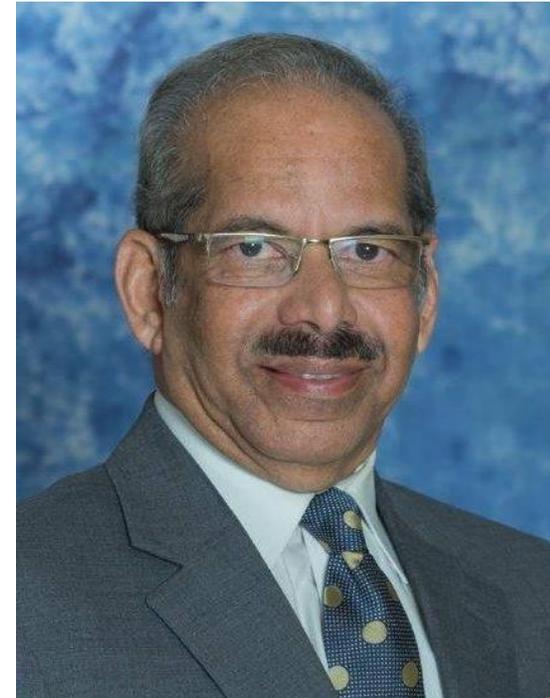
**PDG Larry Webb**



# Global Grants Chair

- Serve as a district expert and resource on Foundation grants. Work with the international service committee to find partners and resources to build and carry out successful global grants.
  - Abide by the terms and conditions of awards for district and global grants; train clubs on their responsibilities under the terms and conditions.
  - Work with the district Rotary Foundation committee chair to create and carry out a district policy to fund grants, and ensure that proper records of grant activities are kept.
- 
- Work with the stewardship subcommittee to ensure good financial and management practices, including reporting, for all grants.
  - Offer guidance on District Designated Fund distribution

## C. C. Theophine



# Peace Fellowship/Scholarship Chair

- Distribute application materials and provide training and guidance to clubs.
- Form a selection committee.
- Recruit and select qualified candidates.
- Conduct orientation for fellowship recipients.
- Work with the district alumni chair to involve peace fellows in alumni activities.

**L. B. Showalter**



# Water & Sanitation Chair

- Coordinate orientation for scholarship recipients.
- Confirm participation by the host district and decide whether the host counselor needs training or guidance.
- Inform Rotarians in the host district that a scholar will study there.
- Maintain contact with scholarship recipients during their study terms.
- Serve as a resource for any potential applicants for global grant scholarships who would like to study at institutions in the district.
- Work with the district alumni chair to involve scholarship recipients in alumni activities.

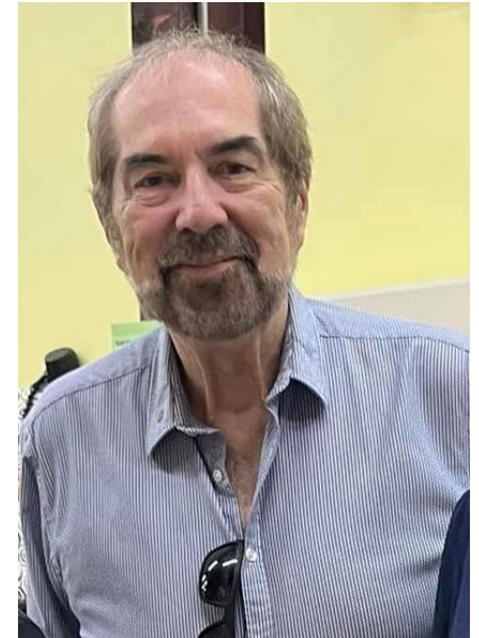
## Peter Fitzwilliams



# Stewardship Subcommittee Chair

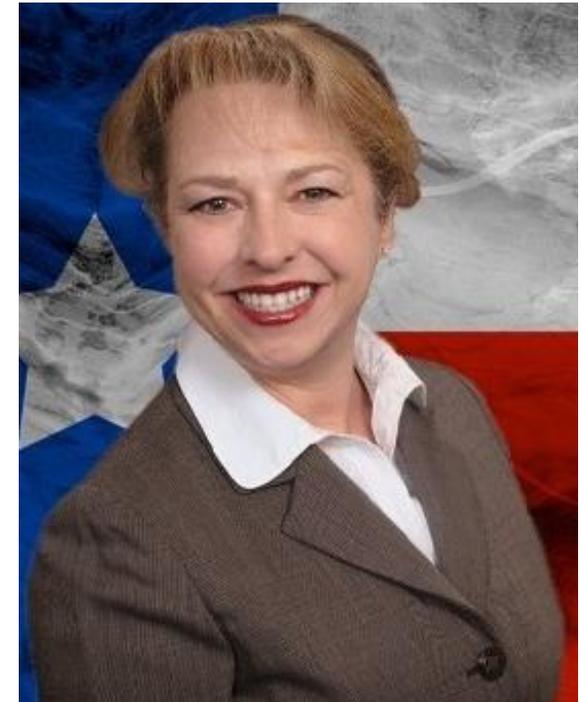
- Assist with implementing the club and district memorandum of understanding, including developing the financial management plan.
- Help with grant management seminars and qualifying clubs.
- Work with the grants subcommittee to implement stewardship and management practices, including reporting, for all grants.
- Monitor and evaluate stewardship and management practices for all grants.
- Make sure that everyone involved in a grant avoids any actual or perceived conflict of interest.
- Form a procedure for resolving any misuse or irregularities in grant related activities, report them to the Foundation, and conduct initial local investigations into reports of misuse.
- Make sure that the annual financial assessment is performed correctly.

**John Johnstone**



# International Service Chair

## Regina Edwards



- Help clubs develop and share international projects.
- Assist in Funding International Projects with District Matching Grants and Global Grants.

# Foundation Giving Recognition

- Special position to ensure proper club and district recognition of new and existing PHFs, PHS members, Major Donors, and Arch Klumpf Society Members.

## John Moser



# FOUNDATION

1. Our Generous Rotarians and Blessed District
2. Our World Class Foundation Supporting Our Goals
3. How Clubs Obtain Foundation Funds for Projects
  - District Matching Grant
  - Global Grants
4. Polio Plus Update
5. The Power of Giving
6. Combining Travel and Foundation Work

# 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)**

### 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

**World Fund (Matching)**

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

### 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

# Our Generous Rotarians and Blessed District

\$ 555,307 ('21-'22)

## District 5810 Fundraising Analysis

\$ 1,154,157 ('22-'23)

Rotary Year	Annual Fund	Polio Plus	Other Funds	Endowment Fund	Total Giving
2022-23	\$341,496	\$109,341	\$48,513	\$654,806	\$1,154,157
2021-22	\$382,324	\$100,285	\$7,098	\$65,600	\$555,307
2020-21	\$293,540	\$80,731	\$43,083	\$584,633	\$1,001,988
2019-20	\$312,724	\$74,312	\$102,612	\$206,900	\$696,548
2018-29	\$319,468	\$90,583	\$49,284	\$135,582	\$594,917
2017-18	\$323,995	\$54,048	\$34,100	\$677,409	\$1,089,553

Our total giving has increased over 200% since the 2021-2022 Rotary year!



# CONTRIBUTION DETAIL REPORT

## District 5810 Fund Summary for 2022-23

Designation	Donors	USD Amount
<b>Annual Fund</b>		
Areas of Focus - Basic education and literacy	2	\$695.00
Areas of Focus - Community economic development	2	\$1,050.00
Areas of Focus - Maternal and child health	1	\$300.00
Areas of Focus - Supporting the Environment	1	\$300.00
Areas of Focus - Water, sanitation and hygiene	7	\$4,165.00
DAF Annual Fund-SHARE	5	\$1,819.56
Disaster Response	17	\$9,730.91
RDG_APF_SH APF SHARE for RDG	1	\$107.53
SHARE	1,261	\$320,877.93
World Fund	8	\$2,450.00
<b>Total for Annual Fund</b>	<b>1,278</b>	<b>\$341,495.93</b>



# Endowment Fund

\$ 65,600 ('21-'22)

## District 5810 Endowment Analysis

\$ 654,806 ('22-'23)

Rotary Year	Endowment Fund
2022-23	\$654,806
2021-22	\$65,600
2020-21	\$584,633
2019-20	\$206,900
2018-29	\$135,582
2017-18	\$677,409

# District Designated Funds Share

Transaction	Description	Amount	Balance
	50% of Annual Fund Share contributions from 2020-2021	\$ 140,590.91	\$ 140,590.91
	50% of Available Endowment Fund Share Earnings	\$ 21,389.02	\$ 161,979.93
	Carry Forward from 2022-2023	\$ 19,695.69	\$ 181,675.62
Project Funding	DG2454179	\$ (78,236.00)	
Project Funding	GG2342580 (KIMS Breast Milk Bank; Coppell)	\$ (10,000.00)	
Project Funding	GG2343143 (Family Self-Reliance Village Empowerment; Dallas)	\$ (2,160.00)	
<b>Total DDF Funding</b>		<b>\$ (90,396.00)</b>	<b>\$ 91,279.62</b>
	<b>Actual DDF Balance</b>		<b>\$ 91,279.62</b>
Tagged	GG2230481 (More than Water, Shaping Lives; Addison Midday)	\$ (11,580.00)	
<b>Total DDF Funding</b>		<b>\$ (11,580.00)</b>	<b>\$ 79,699.62</b>
	<b>Uncommitted DDF Balance (Estimated)</b>		<b>\$ 79,699.62</b>
Pending Allocations	GG2454868 (Transforming Education in Roatan; McKinney)	\$ (24,000.00)	
Pending Allocations	GG2459436 (Cambodia Academy Campus 2024; Allen Sunrise)	\$ (18,000.00)	
<b>Total DDF Pending</b>		<b>\$ (42,000.00)</b>	<b>\$ 37,699.62</b>
	<b>Unallocated DDF Balance (Estimated)</b>		<b>\$ 37,699.62</b>

# Our World Class Foundation Supporting Our Goals



## Our mission

We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

## Vision statement

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.



**Rotary Grants transform your gifts into service projects that change lives both close to home and around the world.**



# GRANT TYPES

- District grants
- Global grants
- Disaster response grants



## DISTRICT GRANTS

---

- Small-scale, short-term
- Local or international activities
- Aligned with the Foundation's mission

# 2022-23 DISTRICT 5810 MATCHING GRANT STATISTICS

## District 5810 Matching Grants

51 grants

\$ 82,263

## Benefit Local Communities

38 grants

\$ 68,217

## Benefit International Communities

13 grants

\$ 14,046



# District 5810 Matching Grants Benefit Local Communities

Addison Midday	Education	United States	700
Addison Midday	Community development	United States	500
Addison Midday	Community development	United States	500
Addison Midday	District support	United States	800
Allen	Education	United States	1,000
Allen	Education	United States	1,500

# District 5810 Grants Benefit Local Communities

Carrollton-Farmers Branch	Health	United States	1,100
Cedar Hill	Education	United States	2,300
Dallas	Community development	United States	3,500
Dallas-Uptown	Education	United States	2,768
E-club of Suicide Preventio...	Health	United States	750
Farmersville	Education	United States	1,500
Frisco	Education	United States	2,500
Grand Prairie Metro	Community development	United States	1,929
Greenville	Health	United States	1,265

# District 5810 Grants Benefit Local Communities

Grayson County	Community development	United States	2,500
Irving Las Colinas	Education	United States	1,356
Lake Texoma (Pottsboro)	District support	United States	350
McKinney	Health	United States	1,250
McKinney	Health	United States	1,250
Melissa	Health	United States	100
Melissa	Health	United States	100
Melissa	Education	United States	100

# District 5810 Grants Benefit Local Communities

Melissa	Community development	United States	100
Park Cities (Dallas)	Health	United States	5,400
Plano Sunrise	District support	United States	1,500
Plano West	District support	United States	1,400
Plano West	Education	United States	2,000
Preston Trail (Celina)	District support	United States	1,433
Preston Trail (Celina)	Education	United States	1,300
Prestonwood (Dallas)	Community development	United States	1,164

# District 5810 Grants Benefit Local Communities

Richardson	Education	United States	3,500
Richardson East	Education	United States	1,490
Rockwall	Community development	United States	2,000
Rockwall	Health	United States	500
Rockwall	Community development	United States	163
Rockwall	Community development	United States	1,250
White Rock (Dallas)	Education	United States	2,500

# District 5810 Grants

## Benefit International Communities

Allen	Health	Honduras	1,000
Allen Sunrise	Community development	Honduras	2,500
Coppell	Economic development	India	0
Coppell	Education	Ethiopia	500
De Soto	Health	Kenya	1,477
E-Club of North Texas	Health	Mexico	400
Melissa	Health	Kenya	100

# District 5810 Grants

## Benefit International Communities

Melissa	Education	Malawi	100
Plano East	Health	Kenya	2,500
Rockwall	Education	Honduras	1,500
Rockwall	Economic development	Mexico	2,150
Royse City	Education	Nicaragua	1,000
Royse City	Education	Nepal	819

# GLOBAL GRANTS

- Large, long-term projects
- Sustainable, measurable outcomes
- Alignment with areas of focus
- International partnership
- \$30,000 minimum budget
- World Fund match for DDF



# 2022-23 DISTRICT 5810 GLOBAL GRANT STATISTICS

## District 5810 Global Grants

14 grants

\$

## Approved Global Grants

10 grants

\$

## Pending Global Grants

4 grants

\$



# District 5810 Global Grants Approved Grants

<u>Title</u>	<u>Total Budget</u>	<u>Total Funding</u>	<u>DDF from</u>		<u>Participants</u>
			<u>District 5810</u>	<u>District 5810 Club</u>	
Kenya Ambulance Project	\$66,260.00	\$66,260.00	\$24,000.00	Waxahachie \$5,000	2 Districts 7 Clubs World Fund
Corneal Eye Transplant	\$83,200.00	\$83,200.00	\$24,000.00	Plano Metro \$25,000	2 Districts 2 Clubs World Fund
Oxford Scholarship - Kyle Kass	\$63,200.00	\$63,200.00	\$24,000.00	Coppell \$18,000	2 Districts 1 Club World Fund
Marymount Improved Water Supply	\$43,200.00	\$43,200.00	\$10,000.00	Coppell \$6,200	2 Districts 4 Clubs World Fund
Global grant scholarship for Masashi Takeda at UTSW	\$66,147.00	\$66,147.00	\$36,749.00	Dallas-Uptown	2 Districts World Fund
House of Light Water Purification Plant	\$117,000.00	\$117,000.00	\$24,000.00	North Texas Pioneers \$27,300	2 Districts 3 Clubs World Fund



# District 5810 Global Grants Pending Grants

<u>Title</u>	<u>Total Budget</u>	<u>Total Funding</u>	<u>DDF from</u>		<u>Participants</u>
			<u>District 5810</u>	<u>District 5810 Club</u>	
Rotary Water Project "More than water, Shaping Lives"	\$49,868.00	\$49,894.00	\$11,580.00	Addison Midday \$4,000	3 Districts 8 Clubs World Fund
KIMS Breast Milk Bank	\$56,000.00	\$56,000.00	\$10,000.00	Coppell \$10,000	2 Districts 2 Clubs World Fund
Mental Health Clinic in Anekal	\$36,400.00	\$36,400.00	\$6,500.00	Dallas \$4,000	2 Districts 3 Clubs World Fund

# THE UPDATED ROTARY FOUNDATION MODEL



- Added new **area of focus**: Environment
- **World Fund match** on DDF applied to **Global Grants** has been reduced from 100% to 80%

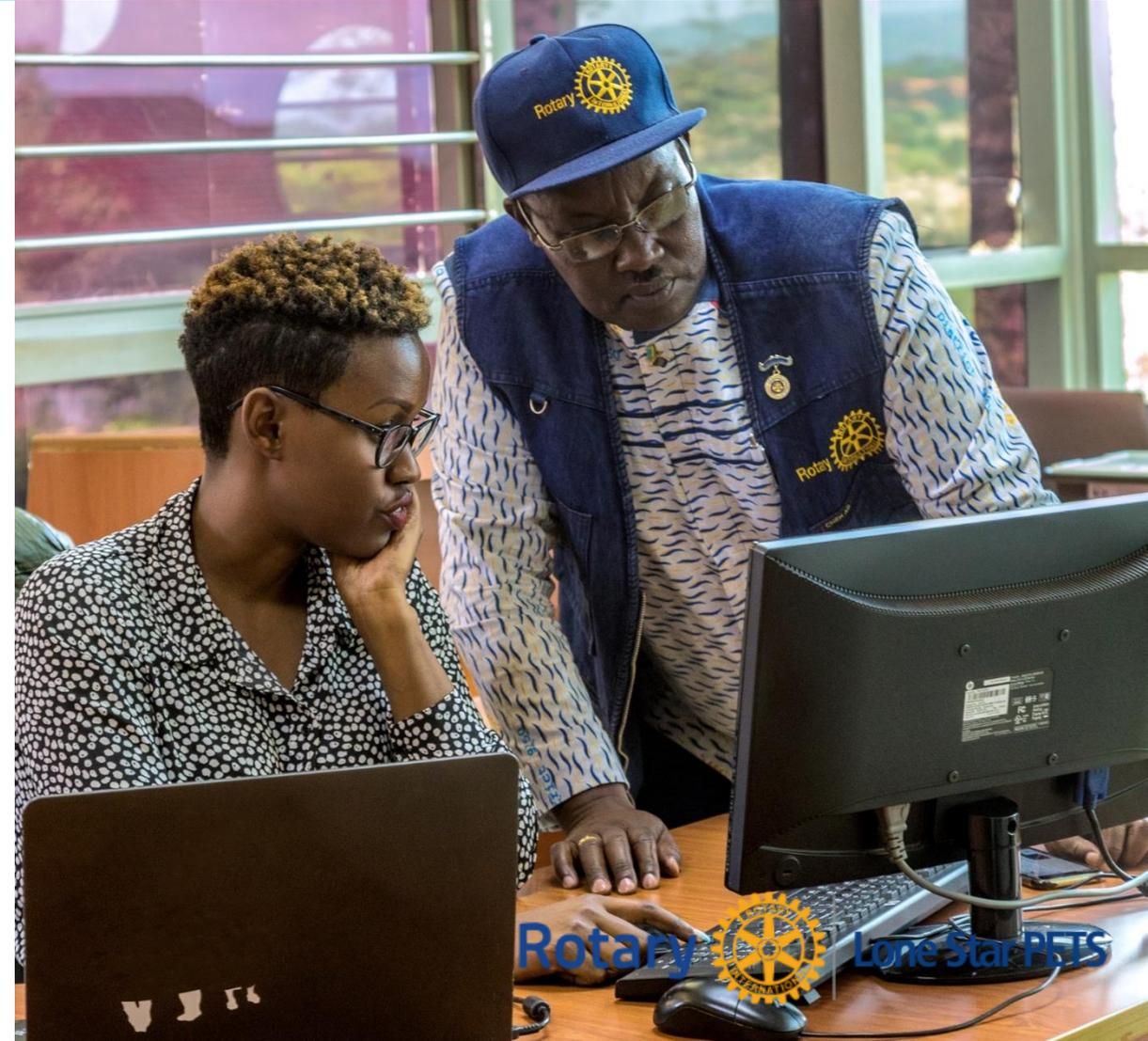
**Rotaract Clubs** may participate in District and Global grants.

# How Clubs Obtain Foundation Funds for Projects

- District Matching Grants
- Global Grants

# DISTRICT 5810 MATCHING GRANTS

- Important Dates:
  - September 1, 2022 – Application Due Date
  - May 31, 2023 – Final Report Due
- Club grants are based on its Annual Fund and Per Capita giving
- Club qualifications and resources are on the District Website at [rotary5810.org](http://rotary5810.org)



# DISTRICT 5810 MATCHING GRANTS RESOURCES

## Subpages

Welcome

## D5810 Policies

2022-23 District Grants Funding Policy

2022-23 FAQs

RI Report - Share Contribution Detail for Program Year 2023

RI Report - Foundation Banner Recognition 2019-20

RI Report - Foundation Banner Recognition 2020-21

RI Report - Foundation Banner Recognition 2021-22

Grants Overview

District Grant Training Aug. 2022

## R.I. Policies

Code of Policies the Rotary Foundation

Term Conditions of Rotary Foundation District

## Forms

2022-23 District Grant Application

2022-23 Memorandum of Understanding MOU

2022-23 District Grant Final Project Report

## District Grant Reports

District Grant 2018-19 Spending Report

## District Grants



District grant applications are due no later than **September 1<sup>st</sup>**. The Grants Final project report is needed for reimbursement no later than **May 1<sup>st</sup>**. A "memorandum of understanding" is needed with a District Grant application form.

The club must disclose any potential conflicts of interest and must comply with the Conflict-of-Interest Policy for Grant Participants as outlined in section 30.040 of the Rotary Foundation Code of Policies, and the Terms and Conditions for Rotary Foundation District Grants. Both documents can be found on this District Grants page under the RI Policies tab.

Paragraph 12.E of the Terms and Conditions for Rotary Foundation District Grants states in part:

*"Some people are not eligible for grants or to benefit from any (emphasis added) Foundation grants. They include:*

1. *Current Rotarians*
2. *Employees of clubs, districts, other Rotary entities, or Rotary International*
3. *The spouses; children or grandchildren by blood, legal adoption, or marriage without adoption; the spouses of these children or grandchildren, or parents or grandparents by blood of people listed above; and employees of agencies, organizations, or institutions that partner with Rotary International or the Foundation.*
4. *Former Rotarians and people with the familial relationships to former Rotarians described above, for three years."*

Rotary  
District 5810  
North Texas

District ▾

Events ▾

Membership ▾

Foundation ▾

Training ▾

Welcome

Foundation Committee

District Grants

Polio Plus

Foundation Calendar

## District Contact Information

**District Grants Chair:** PDG Larry W. Webb

**Phone:** 972-822-1243

**Email:** [webb0079@att.net](mailto:webb0079@att.net)

**District Website:** [www.rotary5810.org](http://www.rotary5810.org)

# GLOBAL GRANTS

- Applications are accepted throughout the year
- Must partner with a Club in another country
- Can invite other Clubs to partner
- Sustainable, measurable outcomes in Rotary's areas of focus
- Qualifications:
  - Club qualification process
  - Grant Management process



# GLOBAL GRANTS

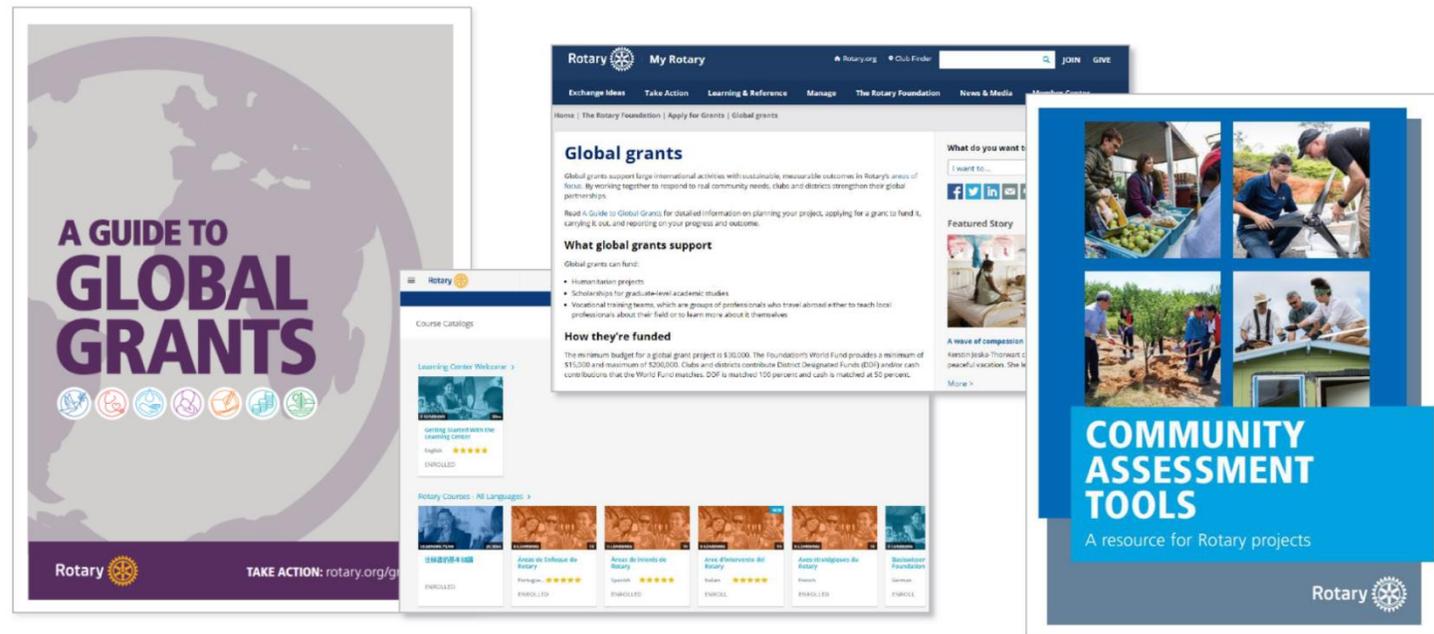
- How they're funded:
  - District Designated Funds (DDF)
    - District 5810 will match 120 percent of Club contributions, up to \$24,000
  - Cash
  - Directed Gifts
  - World Fund match of 80 percent for all DDF contributions

## District 5810 Resources

Global Grants Chair: C.C. Theophine Chamakala  
 Email: [cctheo@gmail.com](mailto:cctheo@gmail.com)

International Service Chair: Regina Edwards  
 Email: [regina.edwards8888@yahoo.com](mailto:regina.edwards8888@yahoo.com)

## Rotary Resources



## GLOBAL GRANT VS. DISTRICT GRANT

	Global grant	District grant
Cost	\$30,000 min.	No max. or min.
Funding	World Fund, DDF, cash	DDF
Application	Online	Managed by district
Area of focus	Project aligns with area of focus	No area of focus requirement
Partnership	Host and international partnership	No partnership required
Sustainability	Required	Not required
Measurability	Required	Not required
Scholarships	Graduate and post-graduate	No study level requirement

# THE POWER OF GIVING

EVERY  
ROTARIAN  
EVERY  
YEAR

## The Annual Fund

The Annual Fund-SHARE system pays for much of what the Foundation does. It's the source of funding for global grants and district grants.

When you give to the Annual Fund-SHARE, the donation enters the SHARE system. In this system, donations are divided between the World Fund and District Designated Funds. After three years, your district can use the District Designated Funds to pay for club, district, or Foundation projects. The World Fund is used for grants that further the Foundation's vision worldwide.

# THE POWER OF GIVING

## Online and recurring giving



Giving online is easy: Use the [Donate](#) page on Rotary.org. Or use [Rotary Direct](#) to give automatically each month, quarter, or year.

# THE POWER OF GIVING

## 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-SHARE**  
[Learn more](#)

  
**PolioPlus Fund**  
[Learn more](#)

  
**World Fund**  
[Learn more](#)

  
**Disaster Response Fund**  
[Learn more](#)

  
**Pakistan Flood Response Fund**  
[Learn more](#)

  
**Ukraine Response Fund**  
[Learn more](#)

## Payment Details

### Credit Card



#### Expiration date

#### CVV

 Note on paying by credit card

[REVIEW MY DONATION](#)

[SUBMIT](#)

# 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 three 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

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

# THE POWER OF GIVING

## Rotary Direct

All fields are required unless marked *optional*.

### Choose what you would like to support

Featured Causes

Areas of Focus

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

Annual Fund-SHARE

Learn more

Polio Fund

Learn more

World Fund

Learn more

Disaster Response Fund

Learn more

You can direct your gift to an area of focus within the Annual Fund. However, Annual Fund gifts that are designated to an area of focus do not generate District Designated Funds (DDF).



**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/phs](http://rotary.org/phs).

### GIFT DESIGNATION (choose one)

- Annual Fund-SHARE  Other \_\_\_\_\_
- PolioPlus Fund

### 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 \_\_\_\_\_



# JOIN THE PAUL HARRIS SOCIETY

## Your membership can support:

- Eradicating polio
- Promoting peace
- Fighting disease
- Providing clean water
- Saving mothers and children
- Supporting education
- Growing local economies
- Responding to disasters
- Protecting the environment

Make your Paul Harris Society giving easy by enrolling in Rotary Direct online or by completing the form below. It's a fast and secure way to fulfill your membership and support The Rotary Foundation's work year-round.



# THE POWER OF GIVING

## WHAT IS THE PAUL HARRIS SOCIETY?

The Paul Harris Society recognizes donors from around the world who notify The Rotary Foundation of their intention to **contribute \$1,000 or more every year** to the Annual Fund, PolioPlus Fund, or approved global grants.

## District 5810 Contact

Paul Harris Society Chair: Andrew McAnally

Email: [turtlespringsranch@msn.com](mailto:turtlespringsranch@msn.com)

Yes! I would like to become a member of the Paul Harris Society. As a member, I intend to contribute US\$1,000 or more every year to the Annual Fund, PolioPlus Fund, or approved global grants.

Name

### If you are a Rotary member, please complete.

Rotary Membership ID

Rotary Club of

Club Number

Billing Address

City  State/Prov.

Postal Code  Country

Phone  Email

Check enclosed (payable to "The Rotary Foundation" for U.S. contributions).

Check enclosed (payable to "The Rotary Foundation (Canada)" for Canadian contributions).

Please contact me about creating a legacy with Rotary.

Fulfillment of your Paul Harris Society membership will be based on cumulative gifts received between 1 July and 30 June each Rotary year, when financially able.

### Gift designation (choose one)

Annual Fund – SHARE  PolioPlus Fund  Other:

### Gift amount (USD)

\$85  \$250  \$1,000  Other: \$

Make this a recurring contribution with Rotary Direct:

Monthly  Quarterly  Annually  (Please specify month)

Card Number

Expiration Date

CVN

M M Y Y

Signature

*Contributions are tax deductible where allowed by law.*

Please send your contribution to the [Rotary International office](#) serving your region.

Contributions may also be made at [rotary.org/donate](http://rotary.org/donate) or by calling 1-866-976-8279.



Lone Star PETS

# THE POWER OF GIVING

## Rotary's tomorrow depends on what we do today.

You can be an important part of the Foundation's next century of serving humanity by including a gift to Rotary's Endowment in your estate plan.

### District 5810 Contact

Benefactor & Bequest Society Chair: PDG Max Duplant

Email: [mduplant@gmail.com](mailto:mduplant@gmail.com)

### Bequests



You can make a bequest to The Rotary Foundation in your estate plan. The Foundation offers several ways to structure charitable gifts, which vary by country.

# POLIO PLUS



As of August 3, 2022

## Wild Polio (Paralyzing)

- 2022
  - 19 cases
    - 1 in Afghanistan
    - 14 in Pakistan (after 0 cases in 17 months)
    - 4 in Mozambique
- 2021
  - 6 cases (Pakistan, Afghanistan, Malawi)
- 2020
  - 140 cases (Pakistan, Afghanistan)
- 2019
  - 176 cases (Pakistan, Afghanistan)

## Vaccine Derived Polio (Mutated, somewhat less severe, and mostly in Africa)

- 2022
  - 187 cases
- 2021
  - 698 cases

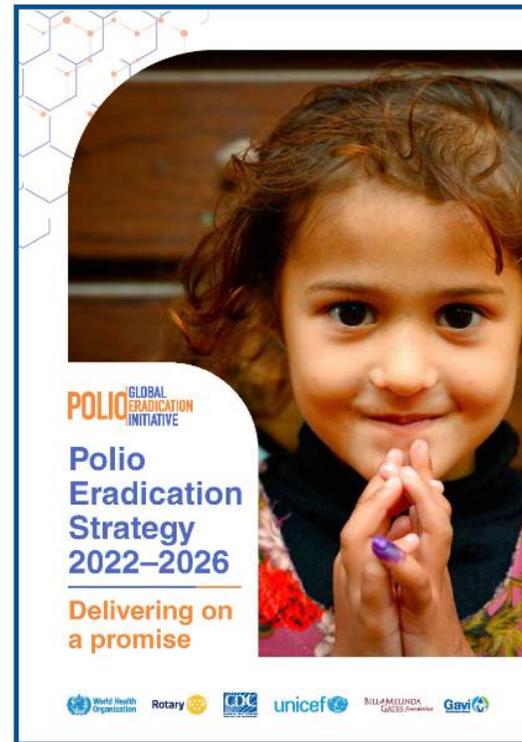
# NEW POLIO ERADICATION STRATEGY

## Goal One

Permanently eradicate the **Wild** Polio virus.

## Goal Two

Stop Transmission of the **Vaccine Derived** Polio virus.



The Gates Foundation has committed to match up to \$50 million per year through 2026.



Polio Eradication Strategy 2022-2026:  
Delivering on a promise

# WHAT MOTIVATES ROTARIANS TO END POLIO?

What Motivates Rotarians to End Polio?

- The virus is still just a plane ride away, as we have recently seen in Malawi, Mozambique and now, **New York City**.
- Polio can find its way again to **any city** and **any country**!
- We must keep up our vigilance, research, vaccinations, environmental sampling, and required funding.





**QUESTIONS**





# District 5810 for PEs & PNs

# DISTRICT GRANTS

**DISTRICT 5810 DISTRICT GRANTS CHAIR**

**PDG LARRY W. WEBB**

**972-822-1243**

**[WEBB0079@ATT.NET](mailto:WEBB0079@ATT.NET)**

**FOR QUESTIONS ABOUT DISTRICT GRANTS,**

**PLEASE MAIL TO:5810 GRANTS @ GMAIL.COM**

**PLEASE INCLUDE YOUR CLUB NAME IN ALL**

**CORRESPONDENCE**

# DISTRICT GRANTS

## Other District Grants Committee Members

**Mike Nix-Grayson County Rotary Club**

# DISTRICT GRANTS

**To be eligible for a District Grant in 2024-2025, clubs must:**

- **Have two club members attend a **mandatory** District conducted Training Session for Club Qualification every Rotary year. By being here today you satisfy part of this attendance requirement.**
- **Enter Membership Goals into Rotary Club Central.**

# DISTRICT GRANTS

- **To be eligible for a District Grant in 2024-2025, clubs must:**
- **Enter Foundation Annual Fund and Polio Plus Fund Goals at RI's Club Central Goal Center by August 15<sup>th</sup>**
- **Contribute to The Rotary Foundation (TRF). Per Capita contributions to the ANNUAL FUND will be used in the award of Grant funds.**

# DISTRICT GRANTS

- **To be eligible for a District Grant in 2024-2025, Clubs must (continued):**
- **Close all previous year District Grants.**
- **Be up-to-date on RI and District Dues Club.**

# DISTRICT GRANTS

- **To be eligible for a District Grant in 2024-2025, Clubs must (continued):**
- **President Elect must Attend PETS Training. By being here today you have met this requirement.**
- **Club must attend District Leadership Training each year.**

# DISTRICT GRANTS

**To be eligible for a District Grant in 2024-2025, Clubs must (continued):**

**District Grants are matching grants. Clubs must contribute additional funds in the amount of their grant request.**

# DISTRICT GRANTS

**District grants fund small scale, short-term activities that address needs. Clubs may support a broad range of activities with their district grant funds.**

# DISTRICT GRANTS

**Rotary Programs:** RYLA, Rotaract, Interact

**Construction Projects:** To improve existing facilities, only.

**Scholarships-**No restrictions on dollars, education level, local or international. **Funds must be paid directly to the Educational Entity to comply with IRS rules.**

# DISTRICT GRANTS

Some examples of projects District Grants cannot fund:

- **Local or international service projects**
- **For International projects, an OFAC form will be required and must be approved by RI Legal for countries identified by the State Dept. as being under economic sanctions.**
- **Vocational training teams**

# DISTRICT GRANTS

**Some examples of projects District Grants cannot fund:**

- **Fundraisers for Rotary clubs or public relations expenses**
- **Purchase of land or buildings (remodeling is acceptable)**
- **Unrestricted cash donations (i.e. debit cards)**

# DISTRICT GRANTS

**Some examples of projects District Grants cannot fund:**

- **Project signage over \$500.00**
- **Establishment of a Club foundation**
- **Admin expenses/personnel of other non-profit organizations**

# DISTRICT GRANTS

## Club Memorandum of Understanding (MOU):

- **Mandatory to obtain Grant**
- **Outlines**
  - **Leadership Responsibilities**
  - **Financial Management**
  - **Document Retention**
  - **Report on Use of Grant Funds**
  - **Authorization & Agreement**
- **MOU must be renewed annually & covers both global and District Grants for the Club.**

# DISTRICT GRANTS

## GENERAL TIMELINE:

Requests for District Grants are due by Sept. 2024 (**Start your planning now for next year**):

- Our District must submit a spending plan to RI for approval.
- Grant funding notification will occur BY EMAIL, once the Club completes **ALL** qualification requirements.
- Final Report due within 30 days of completion of Grant project, or May 1, 2025, to receive your District reimbursement.
- **Final Reports not received by May 1<sup>st</sup> will not be funded.**

# DISTRICT GRANTS

## IMPORTANT DATES FOR ROTARY YEAR 2023-2024

- **Feb. 29-March 3, 2024-LONE STAR PETS**
- **April 12-13, 2024 District Conference**
- **April 27 to March 3, 2024-DISTRICT LEADERSHIP TRAINING ASSEMBLY**
- **May 1, 2024**
- **Deadline for submitting Final Report on current year grants. Final reports not received by May 1, will not be funded.**

# DISTRICT GRANTS

- **IMPORTANT DUE DATES-Rotary Year 2024-2025**
- **July 1, 2024 begin submission for District Grants.**
- **September 1, 2024 Deadline for submission of District Grant Applications**
- **September 1, 2024 (apprx.)-submit spending plan to RI for approval.**
- **Estimated RI Funding date September 15, 2024.**

# DISTRICT GRANTS

## Funding:

- Funds available are different each year.

## Currently:

- Minimum Grant Request is \$500
- Maximum Grant Request is \$3,500 or the Club's calculated Maximum Amount
- Multiple Grant Requests Ok, but total cannot exceed \$3,500, or the Club's calculated Maximum Amount.

**All dollar limitations are subject to change.**

# DISTRICT GRANTS

## GRANT FUNDS AVAILABLE

**Over the next two years the amount of funds for District grants will be less than this years grant funding.**

**This year, 23-24, we had \$78,236 available for District Grants, but had \$83,815 in grant requests. Thirty (31) Clubs submitted 41 District Grant requests.**

**In 2024-2025, \$84,402 is available.**

# DISTRICT GRANTS

## Agreements & Forms

**All Forms are on the District Website.**

- **Grant Application Form**
- **Memorandum of Understanding (MOU)**
- **Final Report**

# DISTRICT GRANTS

## Important Resources

[www.Rotary.org](http://www.Rotary.org)

Login and navigate to :  
Learning & Reference, then to:  
Learning Center, then to:  
Grant Management Seminar

[www.rotary5810.Org](http://www.rotary5810.Org)

Login and navigate to:  
Foundation, then to:  
District Grants & District Forms

# DISTRICT GRANTS

**QUESTIONS?**





# Foundation Global Grants

# Global Grant Procedures –

Global grants support international activities in Rotary's areas of focus and global grant scholarships.

## International Club

- - Financial Support: The International Club provides crucial financial assistance, technical expertise, and comprehensive guidance.
- - Grant Application: The International Club is responsible for completing and submitting the grant application.
- - Grant Committee: Comprises a minimum of three (3) members, including a designated first contact person.

## Host Club

- - Project Initiation: The Host Club initiates the project and conducts a comprehensive community assessment.
- - MOU: Signs a memorandum of understanding (MOU) with the beneficiary institution(s).
- - Project Management: Manages project implementation and budget efficiently.
- - Financial Oversight: Opens a dedicated Global Grant account with at least two (2) authorized signatories and manages fund reception.
- - Global Grant Committee: Maintains a minimum of three (3) members in the Global Grant committee.
- - Reporting: Ensures accurate and timely reporting to the International Club, Districts, and Rotary International (RI).

## Both Clubs

- - Qualification: Must meet the qualification criteria to participate in a global grant.
- - MOU: Develops and signs a memorandum of understanding (MOU) with designated Club Officer(s).
- - Project Planning: Collaboratively develops a comprehensive project plan and assigns a project name.
- - Committee Collaboration: Establishes project committees that actively collaborate with each other.
- - Reporting: Submits project reports through the Grant Center for transparency and accountability.

# Global Grant funds requested range from a minimum of \$30,000 to \$400,000.

## Budget

- International Club and other sources.
- Sources can include other clubs in the district, individuals, organizations or partnering organizations.
- District Designated Fund (DDF)
- RI World Fund
- Requires funding commitment from all sources, but no payment until final approval is received.

### Sample Budget

International Club	DDF 1.2xClub\$	RI World Fund .8xDDF	Total
\$10,000	\$12,000	\$9,600	\$31,600
\$20,000	\$24,000	\$19,200	\$63,200



## GLOBAL GRANT APPLICATION TEMPLATE

The following pages outline the questions you will be asked on the online global grant application. You can use this document for planning purposes. Find the actual grant application at [www.rotary.org/grants](http://www.rotary.org/grants).

### Step 1: Basic information

What's the name of your project?

What type of project are you planning? (humanitarian project, vocational training, scholarship)

All global grants support activities within Rotary's areas of focus.

Select the primary host and international contacts for this project.

The primary host contact lives in the country where the project, training, or study will take place. The primary international contact lives in another country. Both contacts will be responsible for all grant-related correspondence and reporting to The Rotary Foundation.

### Step 2: Committee members

The committee will include at least three members from the host sponsor and three members from the international sponsor.

Who will serve on the grant's host committee?

Who will serve on the grant's international committee?

Do any of these committee members have potential conflicts of interest? If so, please briefly explain.

A conflict of interest is a relationship through which an individual involved in a program grant or award causes benefit for such individual or such individual's family, acquaintances, business interests, or an organization in which such individual is a trustee, director, or officer.

**Global Grant Procedures – Global Grant Application Template must be completed to secure all of the data for final application.**

# Global Grant Procedures –

Global grants support international activities in Rotary's areas of focus and global grant scholarships.

## **Sustainability**

- Start with the community
- Encourage local ownership
- Provide training
- Buy local
- Identify local and host club funding
- Measure your success

## **Community Assessment**

### **Create Timeline**

- Project committee meetings
- Training
- Major meetings with the benefiting community and cooperating organizations
- Follow-up on meetings, conversations, and agreements
- Schedule communications with sponsors, beneficiaries, cooperating organizations, and any other stakeholders.
- Project implementation and benchmarks
- Ongoing monitoring throughout the project
- Evaluation and reporting in the middle and at the end of the project

# Global Grant Procedures –

Global grants support international activities in Rotary's areas of focus and global grant scholarships.

## Filing Final Application

Application authorized by:

- Host and International Club primary contact persons
- Host and International Club Presidents
- Host and International District Rotary Foundation Chairs
- Host and International District Governors

## What Happens Next?

- Receive Global Grant (GG) Number from RI
- Assignment of Regional Grants Officer from RI
- Transfer of funds to Host Club global grant account
- Funds from other sources (other clubs, individuals, organizations) deposited to the Global Grant special account
- Timely audit and reports to be filed by Host Club to the International Club, Districts and RI



# Example of one Global Grant Q&A

