



The Rotary Foundation

A Little Rotary History

- 1905 - Rotary began through the vision of Chicago Attorney Paul Harris
- 1910 – Arch Klumph (Archibald C. Klumph) is one of the founders of the Rotary Club of Cleveland Ohio.
- 1913 – Arch Klumph, President of Rotary Club of Cleveland, advocates for a reserve for the Club to do future good work.
- 1916-17 Arch Klumph is elected President of Rotary International.

Arch Klumph, Father of The Rotary Foundation

- Arch Klumph conceives the idea of the Rotary Foundation:
- *“Carrying on as we are, a miscellaneous community service, it seems eminently proper that we should accept endowments for the purpose of doing good in the world, in charitable, educational or other avenues of community progress, or such funds could be well used for extension work.”*
- Through this stated purpose, the Rotary Endowment is born.

The Rotary Foundation

- -A deeper dive into history on Arch Klumph
 - Moved to Cleveland from Conneautville, PA in his youth
 - Began work at a small lumber company at age 14
 - 1898 - served as president of the lumber company
 - 1912 – became sole owner of the lumber company
 - 1916 – organized a savings and loan company and served as president for 35 yrs.
 - An expert on flute, Arch Klumph was a member of Philharmonic Orchestra.
 - He helped form and manage the Cleveland Symphony Orchestra.

The Rotary Foundation

1928 – Rotary Endowment was formally changed to The Rotary Foundation, the Board of Trustees was formed;

1928-1935 Arch Klumph served as the Chair.

Today the Arch Klumph Society recognizes the highest tier of Donors - \$250,000 and above.

The Rotary Foundation

Our Mission

- The Rotary Foundation helps Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty **in our local communities and communities around the world.**

Our Seven Areas of Focus

- Basic education and literacy
- Community & Economic development
- Disease prevention and treatment
- Maternal and child health
- Peace and conflict prevention/resolution
- Water and sanitation
- Environment and sustainability



The Rotary Foundation - continued

Funding Sustainable Projects

- Capable of maintaining outcomes over the long term to serve the ongoing need of a community after grant funds have been expended.
- Involves local community leaders in planning so that they are invested in the project's long-term success.
- Training and the exchange of information prepare communities to maintain results and solve problems on their own, after the Rotary club's involvement has ended.
- Offers enduring value and a greater return on Rotary's investment of money and volunteer hours.

Major Donation Funds

- Annual Fund
- PolioPlus Fund
- Endowment Fund

Major Expendable Funds

- District Designated Fund – controlled by District Governor and District Foundation Chair
- World Fund – controlled by TRF Board of Trustees



All Expenditures Are Through Grants

- **Global Grants - International projects**
 - Matching grants
 - Minimum \$30,000
 - Rotary host and International partners
 - In the following areas
 - ✓ Scholars
 - ✓ Vocational Training Teams
 - ✓ Humanitarian Grants
- **District Grants**
 - Up to 50% of incoming District Designated Funds each year
 - District 5830 shares these funds with clubs as matching Club Project Grants (CPG)
 - ✓ Maximum grant of 50% of Annual Fund giving by the club three years prior



(SHARE System)

Annual Fund

(Income Only)
(for 3 Years)

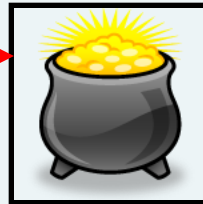


Foundation
Administration

World
Fund



District
Designated
Fund

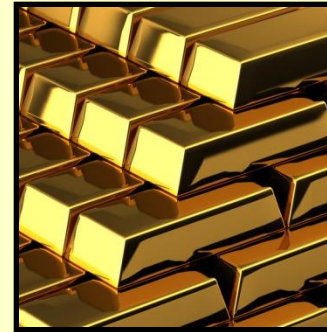


(50 / 50)
(Split)

- **Controlled by TRF**
- Global Grants-Matching
- Packaged Grants

- **Controlled by District**
- District Grants
- Global Grants

Endowment



(Income Only)

- **Controlled by Donor**
- Peace Scholars
- Global Grants
- Areas of Focus

Restricted



- **Controlled by Donor**
- PolioPlus
- PolioPlus Partners
- Global Grants
- Areas of Focus

(SHARE System)

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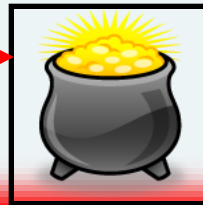


Foundation
Administration

World Fund



District Designated Fund



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(Split)

Endowment



(Income Only)

Restricted



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- **Controlled by District**
- **District Grants**
- **Global Grants-Matching**

- **Controlled by Donor**
- **Peace Scholars**
- **Global Grants**
- **Areas of Focus**

- **Controlled by Donor**
- **PolioPlus**
- **PolioPlus Partners**
- **Grant Grants**
- **Areas of Focus**

(SHARE System)

Annual Fund

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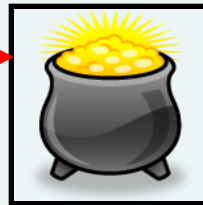


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World
Fund



District
Designated
Fund



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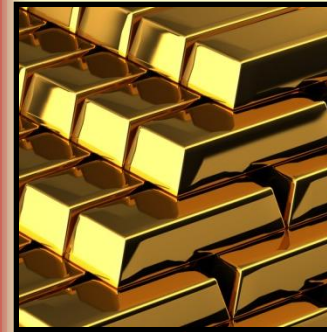
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- Packaged Grants

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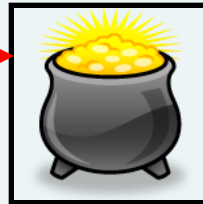


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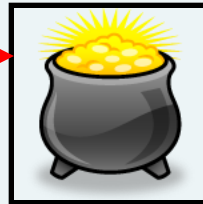


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World
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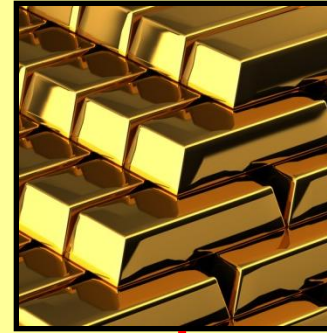


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The Rotary Foundation - continued

Contribution Recognitions

• Donor Recognitions

- **Foundation Sustaining Member (FSM)** - member gives \$100 annually to Annual Fund
- **Paul Harris Fellow (PHF)** - \$1,000 cumulative to Annual Fund, PolioPlus, or approved Global Grants
- **Major Donor** - \$10,000 cumulative in cash and/or assets to TRF
- **Paul Harris Society** - member gives \$1,000 annually to Annual Fund, PolioPlus or approved Global Grants
- **Arch Klumph Society** – Rotary donors that contributed at least \$250,000 to TRF
- **Benefactor** - includes at least \$1,000 to TRF by outright gift or in Estate
- **Bequest Society** - includes at least \$10,000 to TRF in Estate
- **And others**

• Club Recognitions

- **Every Rotarian Every Year Club (EREY)** - every club member gave at least \$25 to the Annual Fund and the average per member gift exceeded \$100
- **100% Sustaining Member Club** - every club member gave at least \$100 to the Annual Fund
- **And others**

The Rotary Foundation - continued

Contribution Forms

- TRF Contribution Form - 123-EN-(321)
- TRF Multiple Donor Form - 094-EN-(1021)
- TRF Recognition Transfer Request Form - 102-EN-(518)
- TRF Memorial or Gift Form – not numbered
- All forms available through District 5830 website at <https://rotary5830.org/page/info-resources> . Recognition forms available through RI at <https://www.rotary.org/en/donate/recognition> .

Club Project Grants Training – Required! Grant Applications Due June 1st.

Grant certification training is a separate required course that the Club President AND Club Foundation Chair must attend BEFORE applying for any Foundation grant.

AND clubs who want to apply for a Club Project Grant (CPG) must be certified before making their application to the District Grant Subcommittee. Completed and accepted CPG applications are due for 2025-26 no later than June 1st .

Your generous contributions fund local humanitarian, Club-sponsored Projects

Discussion: Group Sharing
What projects have your clubs done that are meaningful to you?



Rotary Foundation receives highest rating from Charity Navigator for 17th consecutive year!



Hospital National de San Benito Project

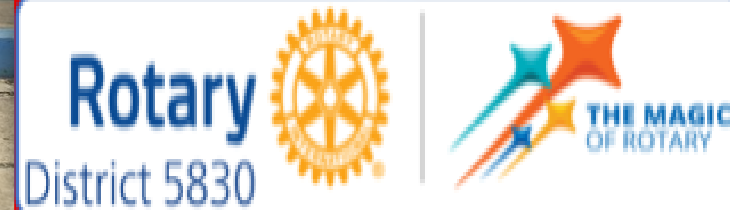
Joint effort between District 5830 and 4250

With Global Grant Financial Support from Our Clubs & Districts 6740, 6110, 6820, and 6540

Rotary clubs of:
Longview,
Longview Greggton,
Marshall,
Texarkana Sunrise,
Carthage, &
Cedar Creek Lake



\$140,000
Project



Tiny Infants now have a chance at life – A decrease in infant mortalities by 60% 60% decrease!



Rotary
District 5830



Create Lasting Impact

In addition: Deborah Bell & Kimberly Garcia trained 192 midwives all across the northern part of Guatemala



Many were illiterate, so the training materials were presented in pictorial format, with training in Spanish and Kekchi

Water and Sanitation Challenge Grants

District 5830 and District 4250 contributed to two “challenge grants” for water and sanitation for 2018-19

The challenge grants were for \$500,000 US each, with one targeted for Honduras and the other for Guatemala

The large grants were through a Rotary Action Group for Water and Sanitation...funded through The Rotary Foundation

WE WON BOTH GRANTS!!!!

The grants will provide restroom and sanitary facilities for 20-30 schools each in both Guatemala and Honduras!

Hooray for us!!!



Create Lasting Impact

Club sponsored Global Projects



Longview Rotary:

Cost: \$830

A village in Eastern Guatemala, Rosario, now has a water distribution system for their entire village of 150 persons

Club sponsored Global Projects



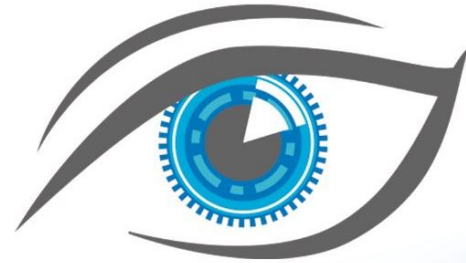
Texarkana Sunrise:

Cost: \$1600

New mothers in the San Benito Hospital now have a cool and inviting place to nurse their newborns



Club sponsored Global Projects



Departamento de Oftalmología
Hospital de San Benito, Petén

DE LO QUE SE PIENSA, SE DICE O SE HACE

1. ¿Es **la verdad**?
2. ¿Es **equitativo** para todo los interesados?
3. ¿ Creará **buena voluntad y mejores amistades**?
4. ¿ Será **beneficiosos** para todos los interesados?



**Henderson:
Cedar Creek Lake
& Individual Rotarians
Cost: \$2900**

**Dr. Iveth Marroquin, Ophthalmologist &
and Tikal' Rotary President has a new
Slit Lamp and has doubled her patient
load, helping to prevent blindness**

Club sponsored Global Projects



**Henderson:
Cedar Creek Lake
Tyler Sunrise**

Trip to Honduras to complete a water project, paint at a Girl's Orphanage, and deliver medical supplies to a trade school.

Club sponsored Global Projects



Restrooms for 230 children: unsanitary, no hand washing facilities, falling down

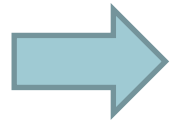


Rocks incorporated into wall



Nearing completion

Construction complete



Children brought rocks for the project



Longview:

Cost: \$5000

Children at one of the three schools at San Pedro have gone from having inadequate/unsanitary latrines to new, flush toilets and lavatories

Club sponsored Global Projects

Paris United: The pediatric ward at the National Hospital in San Benito had a single room for children with both viral and bacteriological infections. They often cross infected each other, extending their stays in the hospital. The Tikal Rotary Club has an architect in the Club who designed isolation walls separating the children, helping them to go home sooner with fewer complications.

Cost: \$1800



HOW DO I GET INVOLVED

CLUB
QUALIFICATION.

CLUB OFFICER
RESPONSIBILITIES

FINANCIAL
MANAGEMENT
PLAN

BANK ACCOUNT
REQUIREMENTS

REPORT ON USE
OF GRANT FUNDS

DOCUMENT
RETENTION

REPORT MISUSE
OF GRANT FUNDS

FOLLOW ALL
REQUIREMENTS
OF DISTRICT 5830

CLUB QUALIFICATION

Download and Sign
a Club
Memorandum of
Understanding .

Agree to implement
financial and
stewardship
requirements.

Send one Club
Member yearly to
the District Grant
Management
Seminar.

The Club is
responsible for the
use of all funds on
Club-sponsored
grants.

Qualification can be
revoked.

Audit compliance is
required.

Club Officers are
primarily
responsible .

Follow All
Requirements
District 5830 and
TRF.

FINANCIAL MANAGMENT

Complete
Record All
Receipts and
Disbursements.

Segregation of
Duties for
Handling Grant
Funds.

Inventory
System for
Equipment and
Assets Required.

All Grant
Activities
Comply With
Local Law.

Account
Requires 2
Signatures.

Low or No
Interest Bearing
Account.

BANK ACCOUNT

Any Interest
Earned
Documented and
Used For Grant.

Separate Account
For Each Club
Grant.

Grant Funds Not
For Investment
Accounts.

Bank Statements
Showing All
Transactions.

Club Must Have
Written Plan for
Signatory Change.

Audit compliance
is required.

Club Officers are
primarily
responsible .

Follow All
Requirements
District 5830 and
TRF.

SEVEN YEARS DOCUMENT RETENTION

Establish
Record Keeping
System.

Audit
Compliance
Required.

Keep Signed
Club MOU.

Keep Bank
Statements
Showing All
Transactions.

Keep Financial
Management
Plan.

All Information
Related To
Grants.

Keep All
Receipts and
Invoices.

Records Must
Be Accessable.

MISUSE OF GRANT FUNDS IMMEDIATELY DISCLOSED

ADDITIONAL 5830 REQUIREMENTS

- Submit between May 1 and June 1 to the District Grant Subcommittee Chair.
- Await the review and submission of your CPG along with all the remaining District Club CPGs to The Rotary Foundation.
- Save all receipts and cancelled checks and Account Statements from the Club designated restricted bank account and take pictures of the project and community impact.
- When complete, send your completed information with all receipts and cancelled checks and account statements from the Club designated restricted bank account to the District Grant Subcommittee Chair. Notice of Completion is due May 1 to May 30 or 30 days after finished.

RETURN ALL FUNDS NOT USED TO TRF THROUGH
DISTRICT 5830



Your generous contributions are truly saving lives and improving the lives of children and adults you may never know in places you may never visit.

Now, what difference would you like to make!