



The Trustees have approved policy changes, effective 1 July 2021, that will strengthen the Foundation's ability to fund more global grants.

1. District Designated Fund (DDF) contributions transferred to PolioPlus will be matched at 50%.

DDF contributions transferred to PolioPlus will be matched at 50% instead of 100% by the World Fund before being matched by the Bill & Melinda Gates Foundation. The Gates Foundation will continue matching 2-to-1 every dollar that Rotary commits to polio eradication, up to \$50 million per year.

It's vital that we continue to raise \$50 million a year for polio eradication and raise awareness by keeping it a top priority for our clubs, our communities, and our government officials.

2. The World Fund match of DDF will be reduced from 100% to 80% when being used for global grants.

Instead of DDF applied to global grants receiving a 100% match from the World Fund, the global grants match will decrease to 80%. For the 2020-21 Rotary year, as long as funds remain available, DDF will continue to be matched at 100% for applications submitted by 31 May and approved by 30 June. Applications that are not approved this Rotary year will need to be resubmitted with adjusted financing.

3. Five percent of the current year's Annual Fund-SHARE contributions will be taken equally from the World Fund and DDF to help fund operating expenses.

Currently, Annual Fund-SHARE contributions are split equally between the World Fund and DDF, with 5% of the total SHARE contributions being deducted only from the World Fund to help pay for operating expenses.

Beginning 1 July, all Annual Fund-SHARE contributions will first have 5% directed to operating expenses and the remaining will then be split equally between the World Fund and DDF. For example, a \$100 contribution will generate \$5 for operating expenses and the remaining \$95 will be divided equally, with \$47.50 for DDF and \$47.50 for the World Fund.

4. The ability to roll over unused DDF will be limited to five years. At the end of each Rotary year, DDF that has been held for more than five years will be applied at the district's discretion to PolioPlus, area of focus Endowment funds, the general Endowment Fund (including the Rotary Peace Centers), the Disaster Response Fund, or the World Fund. The first DDF rollover redirection will take place 1 July 2026.

Annual Fund donors give with the expectation that their contributions will be used promptly to help communities, but the amount of rollover DDF each year remains high. On 1 July 2020, \$48.8 million was carried into the current Rotary year. Let's put these funds to use to increase the impact we make through our programs.

Starting on 1 July 2026, districts can choose how to apply any rollover funds remaining from 2020-21 as outlined above. If a district doesn't advise the Foundation about how to direct those funds, the rollover DDF will automatically be directed to the World Fund.