



ROTARIAN
AT WORK



THE ROTARY FOUNDATION

ANNUAL REPORT ON OPERATIONS 2017-18

Rotary



Rotary.org

THE ROTARY FOUNDATION REPORT ON OPERATIONS 2017-18

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This report is a companion piece to Rotary's Annual Report, which is available at Rotary.org. All monetary amounts are in U.S. dollars. Unless otherwise specified, the figures in the report are as of 30 June 2018 and are unaudited. Send questions to rotarysupportcenter@rotary.org.

INTRODUCTION

The Rotary Foundation 2017-18 Report on Operations offers a comprehensive look at the progress and achievements of the Foundation's programs in response to the world's wide range of humanitarian needs. The Foundation marked its first year of its second century of service in 2017-18.

The report is also intended as a resource for those engaged at a high-level in the activities and affairs of our Foundation. We hope you find this report an informative account of the achievements of The Rotary Foundation (TRF).

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

Your club or district can apply for grants from the Foundation to invest in projects and provide scholarships. The Foundation also leads the charge on worldwide Rotary campaigns such as eradicating polio and promoting peace. Rotarians and friends of Rotary support the Foundation's work through voluntary contributions which helps fund our humanitarian activities through local service projects and global initiatives.

PHILANTHROPY

PHILANTHROPY SUMMARY

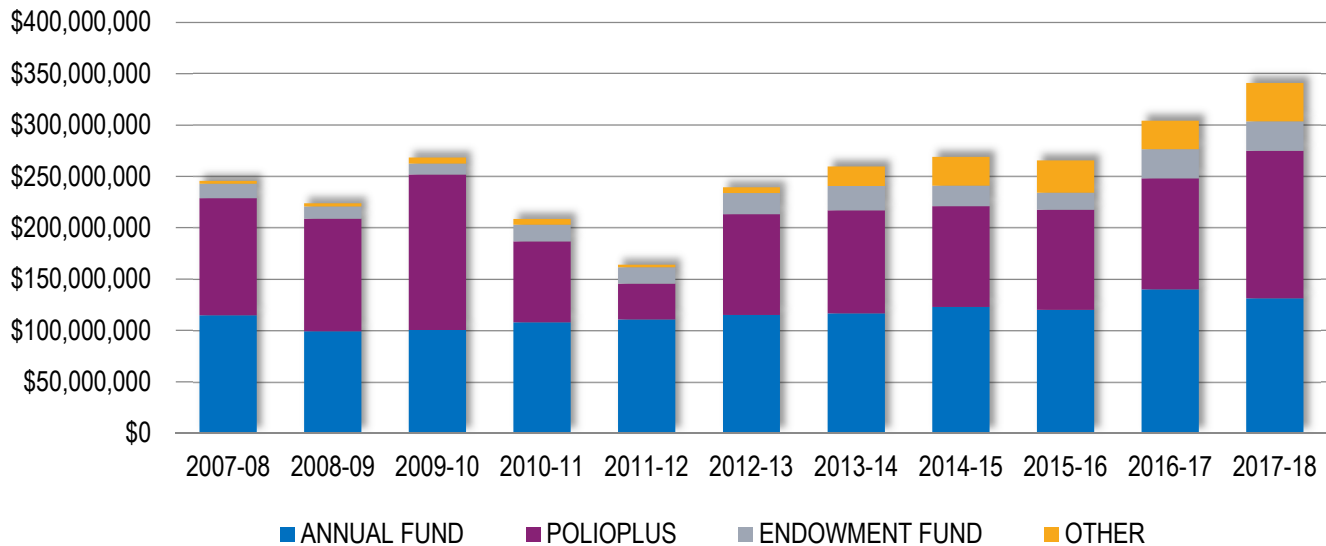
Rotary's philanthropic activities help provide the financial resources necessary to implement TRF programs which improve the lives of millions of people throughout the world.

Contribution summary	2017-18	2017-18 goal	Cumulative
Annual Fund	\$131.4 million	\$135.0 million	\$2.6 billion
Endowment Fund	\$28.5 million	\$18.4 million	\$348.6 million
PolioPlus Fund	\$143.6 million	\$150.0 million	\$1.5 billion
Other*	\$37.6 million	\$23.1 million	\$194.4 million
Total outright contributions	\$341.1 million	\$326.5 million	\$4.7 billion
Total expectancies to the Endowment Fund	\$59.5 million	\$33.5 million	\$804.9 million
Polio transfers**	\$14.1 million	\$15.0 million	-
Grand total	\$414.7 million	\$360.0 million	-

* Other includes global grant cash, term gifts, and contributions to the donor advised fund.

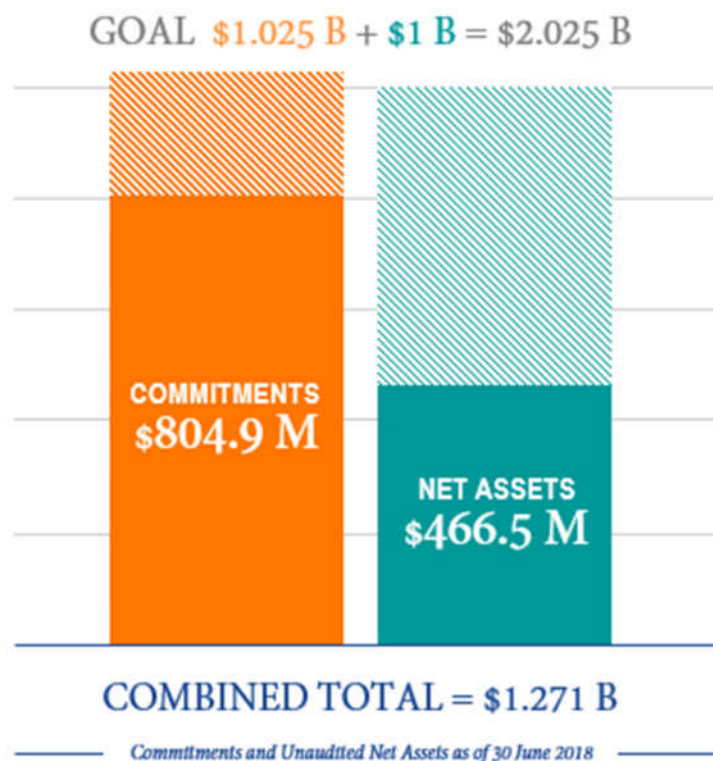
** District Designated Fund transfers and the resulting World Fund match to PolioPlus, affinity card royalties and donor advised fund transfers to PolioPlus.

TOTAL OUTRIGHT CONTRIBUTIONS



BUILDING THE ROTARY FOUNDATION ENDOWMENT: 2025 BY 2025

Rotarians have a goal of reaching \$1.0 billion in net assets (invested funds) and \$1.025 billion in commitments for future gifts, totaling \$2.025 billion for the Endowment, by the year 2025. The goal — Building The Rotary Foundation Endowment: 2025 by 2025 — consists of three objectives: raising awareness of Rotary’s Endowment; soliciting new outright gifts and commitments; and stewarding existing donors. Save lives and enrich communities into the next century and beyond by creating your Rotary legacy.



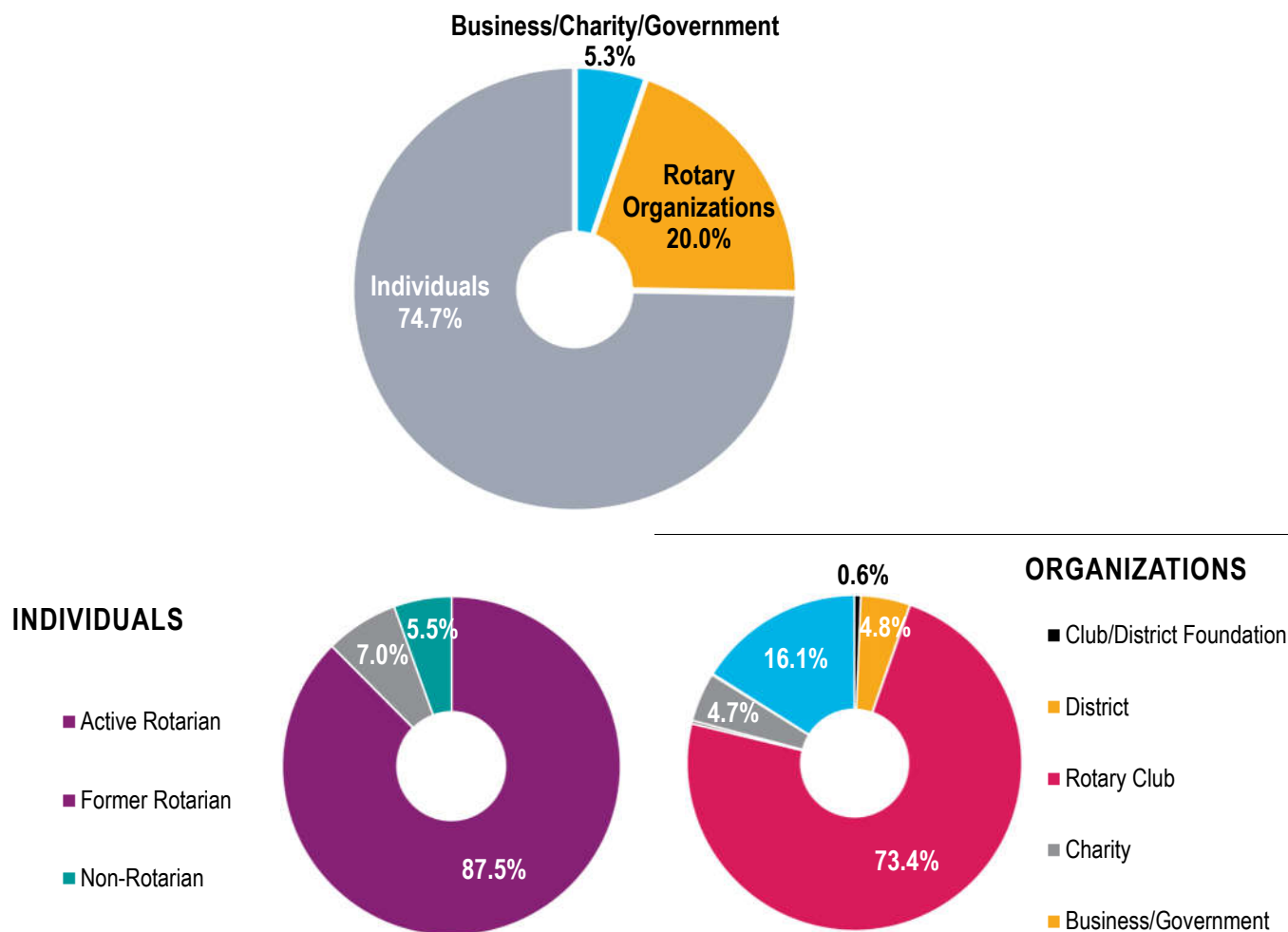
TOP 30 GIVING COUNTRIES

Rank	Country	Rotarians	% of All Rotarians	Clubs	% of All Clubs	Annual Fund	PolioPlus Fund*	Other Funds	Endowment Fund	Total Contributions	Annual Fund Per Capita
1	United States	319,512	27%	7,629	21%	\$46,465,996	\$117,019,810	\$5,980,697	\$11,799,750	\$181,266,253	\$145.43
2	India	138,989	12%	3,715	10%	9,096,606	1,659,970	6,890,131	1,529,313	19,176,020	65.45
3	Japan	87,467	7%	2,261	6%	12,643,201	2,468,007	234,286	3,308,823	18,654,317	144.55
4	Korea	59,884	5%	1,616	5%	13,733,828	264,031	670,728	2,315,602	16,984,189	229.34
5	Taiwan	33,463	3%	784	2%	7,437,012	977,294	1,482,520	2,975,129	12,871,955	222.25
6	Canada	23,310	2%	719	2%	3,976,230	2,450,793	1,477,278	1,291,663	9,195,964	170.58
7	Germany	55,232	5%	1,074	3%	4,339,591	1,532,165	241,140	10,000	6,122,896	78.57
8	Australia	27,948	2%	1,082	3%	3,414,166	1,044,224	286,503	804,527	5,549,420	122.16
9	Brazil	53,492	4%	2,393	7%	3,663,969	597,054	225,165	64,187	4,550,375	68.50
10	UK	45,102	4%	1,691	5%	2,651,721	1,405,055	194,009	293,341	4,544,126	58.79
11	New Zealand	7,746	1%	239	1%	571,136	3,501,099	73,916	60,341	4,206,492	73.73
12	Italy	39,640	3%	879	2%	2,924,124	868,895	73,773	72,242	3,939,034	73.77
13	France	30,943	3%	1,077	3%	2,639,799	765,728	109,471	15,002	3,530,000	85.31
14	Philippines	24,057	2%	893	3%	3,136,905	129,711	105,648	7,545	3,379,809	130.39
15	Thailand	8,040	1%	336	1%	1,290,559	74,770	437,231	21,000	1,823,560	160.52
16	Mexico	9,867	1%	592	2%	1,060,117	118,762	262,019	123,325	1,564,223	107.44
17	Switzerland	12,869	1%	215	1%	787,621	595,628	44,186	-	1,427,435	61.20
18	Bangladesh	9,405	1%	336	1%	619,296	29,329	431,521	109,038	1,189,184	65.85
19	Nigeria	7,370	1%	339	1%	532,965	193,212	92,797	271,775	1,090,749	72.32
20	Belgium	9,755	1%	262	1%	709,421	262,447	85,470	2,582	1,059,920	72.72
21	Netherlands	17,325	1%	492	1%	726,281	212,198	11,695	7,131	957,305	41.92
22	Nepal	4,368	0%	115	0%	168,591	33,675	709,485	-	911,751	38.60
23	South Africa	3,697	0%	202	1%	240,250	100,014	8,718	434,915	783,897	64.99
24	Austria	7,790	1%	148	0%	679,440	45,144	21,258	3,131	748,973	87.22
25	Sweden	22,853	2%	497	1%	339,556	266,069	29,345	16,216	651,186	14.86
26	Uganda	2,843	0%	94	0%	396,524	50,830	57,720	72,468	577,542	139.47
27	Hong Kong	1,803	0%	66	0%	383,956	49,800	61,291	28,800	523,847	212.95
28	Singapore	773	0%	22	0%	250,656	59,387	191,473	18,200	519,716	324.26
29	Norway	10,586	1%	288	1%	339,483	140,950	18,298	9,246	507,977	32.07
30	Argentina	9,784	1%	605	2%	333,827	99,968	69,843	2,312	505,950	34.12
	Total 30 Countries	1,085,913	90%	30,661	86%	\$125,552,827	\$137,016,019	\$20,577,615	\$25,667,604	\$308,814,065	\$115.62

* United States contributions to PolioPlus includes \$107.3 million from the Bill & Melinda Gates Foundation.

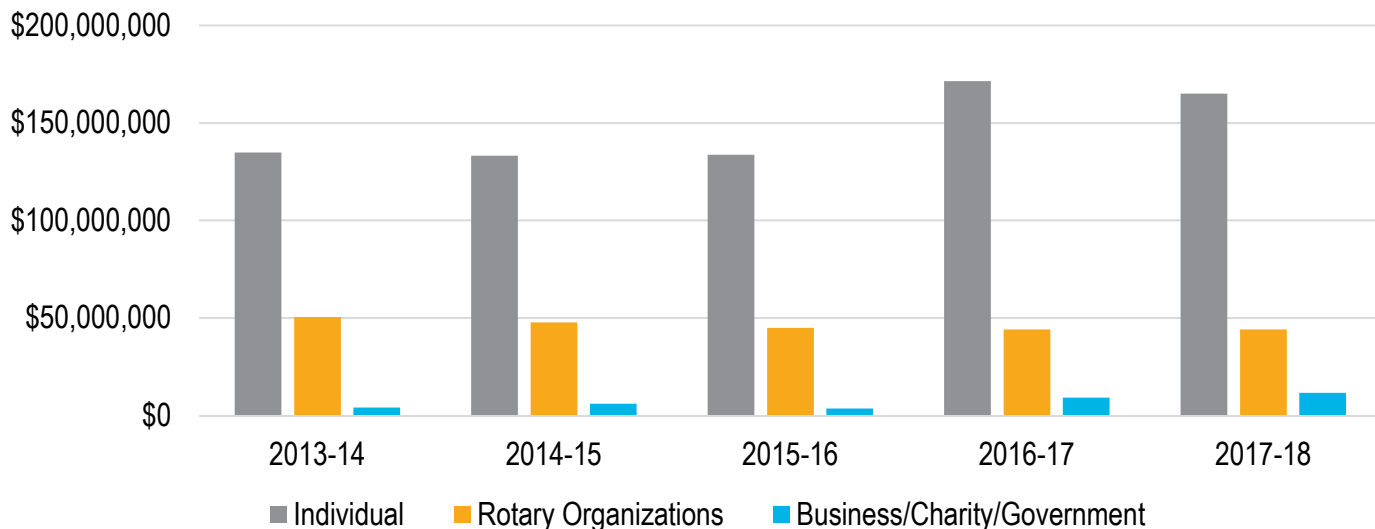
OUR DONOR BASE

2017-18 PERCENTAGE OF TOTAL OUTRIGHT CONTRIBUTIONS BY SOURCE



* Excludes contributions received from the Bill & Melinda Gates Foundation.

CONTRIBUTION BY SOURCE



* Excludes contributions received from the Bill & Melinda Gates Foundation.

TOTAL YEARLY CONTRIBUTIONS BY AMOUNT

Contributions from individuals, corporations, and charities. Does not include contributions from club or district foundations or the Bill & Melinda Gates Foundation.

Donor support by contribution level: 2014-15 to 2017-18								
Gift level	2014-15		2015-16		2016-17		2017-18	
	Donors	Contributions	Donors	Contributions	Donors	Contributions	Donors	Contributions
\$1,000,000	3	\$3,011,033	1	\$1,000,000	6	\$10,594,722	6	\$8,882,579
\$500,000	5	\$3,804,431	4	\$2,800,018	11	\$6,827,935	5	\$3,002,303
\$250,000	25	\$7,560,102	12	\$3,488,845	26	\$7,452,135	26	\$7,762,401
\$100,000	71	\$11,263,007	54	\$8,669,260	108	\$18,405,110	111	\$19,360,745
\$50,000	60	\$3,786,036	65	\$4,118,185	81	\$5,152,523	93	\$5,958,782
\$25,000	132	\$4,244,052	191	\$6,000,994	227	\$7,052,485	229	\$7,233,431
\$10,000	759	\$9,310,058	866	\$10,455,447	1,085	\$13,465,827	1,036	\$12,582,293
\$5,000	1,123	\$7,587,611	1,141	\$7,766,581	1,290	\$8,722,604	1,323	\$8,797,346
\$1,000	33,308	\$41,544,262	33,911	\$42,218,051	37,740	\$47,787,534	38,758	\$49,211,244
\$500	16,270	\$10,054,915	15,647	\$9,672,153	17,072	\$10,602,283	17,140	\$10,642,527
\$100	251,303	\$36,961,316	250,125	\$36,828,747	254,159	\$38,673,742	248,936	\$37,558,816
\$50	50,924	\$3,485,503	51,862	\$3,471,520	52,787	\$3,571,354	51,965	\$3,505,231
\$25	29,288	\$949,170	30,237	\$966,964	93,074	\$2,703,614	54,223	\$1,641,085
\$1	65,491	\$683,248	60,255	\$666,682	35,478	\$402,617	41,836	\$443,279
Total	448,762	\$144,244,744	444,371	\$138,123,447	493,144	\$181,414,484	455,687	\$176,582,062

ALL FUNDS

Average giving includes all cash contributions to the Annual, Endowment, PolioPlus and other funds, excluding gifts from the Bill & Melinda Gates Foundation.

INDIVIDUAL PARTICIPATION IN ALL FUNDS

	Individual contributors	Rotarian contributors	Percentage of Rotarians contributing	Total giving per Rotarian ¹
2017-18	452,393	432,715	36.0%	\$194.30
2016-17	490,219	470,918	40.0%	\$187.11
2015-16	441,390	422,485	34.9%	\$161.93
2014-15	445,610	426,285	35.9%	\$167.45
2013-14	421,478	402,825	34.0%	\$163.55
2008-18	1,214,772	1,107,113	—	—

CLUB PARTICIPATION IN ALL FUNDS

	Total clubs	Participating clubs	Percentage participating	100% participating districts ²
2017-18	34,992	29,711	84.9%	148
2016-17	34,795	29,851	85.8%	148
2015-16*	34,583	29,579	85.6%	148
2014-15	35,114	29,657	84.5%	134
2013-14	34,823	29,526	84.8%	144
2008-18	—	38,402	—	—

* Beginning in 2015-16, clubs chartered during the Rotary year are not included in the totals for club participation. The total club number will not match Rotary membership reports.

¹Total giving per Rotarian is calculated by the total amount contributed to each fund divided by Rotary membership as of 1 July. Rotarian donors are those who were active members at the time of the contribution.

²100% participating districts are districts where every active club in the district contributed to the corresponding fund.

ANNUAL FUND

Annual Fund contributions can be further directed to SHARE, an areas of focus, and the World Fund.

ANNUAL FUND INDIVIDUAL PARTICIPATION

	Individual contributors	Rotarian contributors	Percentage of Rotarians contributing	Total giving per Rotarian ¹
2017-18	410,279	396,696	33.0%	\$109.09
2016-17	448,952	436,507	36.1%	\$112.83
2015-16	410,315	397,211	32.8%	\$100.62
2014-15	417,243	383,863	32.3%	\$103.52
2013-14	396,070	367,629	31.0%	\$99.95
2008-18	1,122,151	1,050,280	—	—

ANNUAL FUND CLUB PARTICIPATION

	Total clubs	Participating clubs	Percentage participating	100% participating districts ²
2017-18	34,992	27,876	79.7%	96
2016-17	34,795	28,504	81.9%	111
2015-16	34,583	27,525	79.6%	95
2014-15	35,114	27,758	79.1%	88
2013-14	34,823	27,689	79.5%	103
2008-18	—	37,624	—	—

¹Total giving per Rotarian is calculated by the total amount contributed to the Annual Fund divided by Rotary membership as of 1 July. Rotarian donors are those who were active members at the time of the contribution.

²100% participating clubs are districts where every active club in the district contributed to the Annual Fund.

POLIOPLUS FUND

Contributions to PolioPlus and PolioPlus partners

POLIOPLUS FUND INDIVIDUAL PARTICIPATION

	Individual contributors	Rotarian contributors	Percentage of Rotarians contributing	Total giving per Rotarian ¹
2017-18	117,950	111,350	9.3%	\$32.37
2016-17	114,400	108,565	9.0%	\$29.69
2015-16	91,846	85,491	7.1%	\$22.61
2014-15	84,860	79,378	6.7%	\$24.37
2013-14	73,813	68,756	5.8%	\$24.19
2008-18	396,629	357,629	—	—

POLIOPLUS FUND CLUB PARTICIPATION

	Total clubs	Participating clubs	Percentage participating	100% participating districts ²
2017-18	34,992	17,878	51.1%	34
2016-17	34,795	17,214	49.5%	28
2015-16	34,583	16,590	48.0%	36
2014-15	35,114	15,897	45.2%	22
2013-14	34,823	14,589	41.9%	18
2008-18	—	32,594	—	—

¹Total giving per Rotarian is calculated by the total amount contributed to the PolioPlus Fund divided by Rotary membership as of 1 July. Rotarian donors are those who were active members at the time of the contribution.

²100% participating clubs are districts where every active club in the district contributed to the PolioPlus Fund.

ENDOWMENT FUND

Contributions are invested, with spendable earnings designated to the areas of focus, Rotary Peace Centers, SHARE, and World Fund. Figures below do not include bequests and other revocable commitments.

ENDOWMENT FUND INDIVIDUAL PARTICIPATION

	Individual contributors	Rotarian contributors	Percentage of Rotarians contributing	Average size of yearly giving	Total giving per Rotarian ¹
2017-18	5,839	5,428	0.5%	\$4,869	\$21.69
2016-17	6,280	5,853	0.5%	\$5,229	\$21.67
2015-16	4,002	3,589	0.3%	\$4,738	\$13.51
2014-15	4,356	3,967	0.3%	\$5,276	\$16.65
2013-14	4,381	3,915	0.4%	\$5,680	\$21.28
2008-18	29,674	26,433	—		—

ENDOWMENT FUND CLUB PARTICIPATION

	Total clubs	Participating clubs	Percentage participating	100% participating districts ²
2017-18	34,992	2,601	7.5%	0
2016-17	34,795	2,789	8.0%	0
2015-16	34,583	2,306	6.7%	0
2014-15	35,114	2,393	6.8%	0
2013-14	34,823	2,483	7.1%	0
2008-18	—	9,360	—	—

Beginning in 2017-18, counts and average size of yearly giving to the Endowment Fund have been readjusted to remove gifts under \$5.

¹Total giving per Rotarian is calculated by the total amount contributed to the Endowment Fund divided by Rotary membership as of 1 July. Rotarian donors are those who were active members at the time of the contribution.

²100% participating clubs are districts where every active club in the district contributed to the Endowment Fund.

OTHER FUNDS

Term gifts, cash contributions for global grants, the donor advised fund, and other approved programs

OTHER FUNDS INDIVIDUAL PARTICIPATION

	Individual contributors	Rotarian contributors	Percentage of Rotarians contributing	Total giving per Rotarian ¹
2017-18	8,494	8,041	0.7%	\$17.93
2016-17	7,744	7,407	0.6%	\$14.15
2015-16	6,288	5,898	0.5%	\$13.34
2014-15	5,096	4,808	0.4%	\$14.56
2013-14	4,260	3,965	0.3%	\$13.03
2008-18	56,429	52,408	—	—

OTHER FUNDS CLUB PARTICIPATION

	Total clubs	Participating clubs	Percentage participating	100% participating districts ²
2017-18	34,922	3,430	9.8%	0
2016-17	34,795	3,379	9.7%	1
2015-16	34,583	3,415	9.9%	1
2014-15	35,114	3,303	9.4%	0
2013-14	34,823	3,644	10.5%	0
2007-18	—	17,762	—	—

¹Total giving per Rotarian is calculated by the total amount contributed to other funds divided by Rotary membership as of 1 July. Rotarian donors are those who were active members at the time of the contribution.

²100% participating clubs are districts where every active club in the district contributed to other funds.

ONLINE CONTRIBUTIONS

	All Donors / Individuals	Percentage of individual donors	Total contributed online	Percentage of total contributions	Total outright contributions
2017-18	60,256 / 59,117	13.1%	\$16.0 million	4.7%	\$341.1 million
2016-17	60,827 / 59,796	12.2%	\$14.7 million	4.8%	\$304.4 million
2015-16	44,801 / 43,971	10.0%	\$11.4 million	4.2%	\$265.6 million
2014-15	39,190 / 38,582	9.0%	\$10.2 million	3.8%	\$268.9 million
2013-14	31,202 / 30,726	7.0%	\$8.9 million	3.4%	\$263.7 million
2012-13	27,578 / 27,225	7.0%	\$8.1 million	3.2%	\$249.4 million
2008-18	173,005 / 169,974		\$93.3 million		

ROTARY DIRECT*

	Rotary Direct participants	Donors of \$1,000+	Average annual Rotary Direct contribution	Total Rotary Direct contributions	Change in total contributions from previous year
2017-18	19,898	3,994	\$445	\$8.9 million	14.0%
2016-17	18,453	3,449	\$424	\$7.8 million	18.0%
2015-16	16,714	2,783	\$396	\$6.6 million	32.0%
2014-15	12,338	2,106	\$404	\$5.0 million	8.7%
2013-14	9,934	2,570	\$460	\$4.6 million	43.8 %
2008-18	28,987	6,248*	\$391	\$40.8 million	23.6%

* Starting in 2015-16, the information in this table includes The Australian Rotary Foundation Trust Direct Debit program.

PAUL HARRIS SOCIETY*

	Paul Harris Society members	Outright contributions (Annual Fund only)	Percentage of total Annual Fund Contributions
2017-18	21,609	\$21.5 million	16.4%
2016-17	19,708	\$21.8 million	15.6%
2015-16	16,748	\$17.5 million	14.6%
2014-15	14,106	\$16.3 million	13.2%
2013-14	10,106	\$11.6 million	10.0%

* The Paul Harris Society became an official donor recognition program at the start of 2013-14. Paul Harris Society donors commit to giving \$1,000 annually.

MAJOR GIFTS OUTCOMES

A Major Gift is an irrevocable gift of \$10,000 or more. Includes: outright cash gifts; stock; donor advised fund grants; Individual Retirement Accounts; and realized estate gifts; full face amount of new pledges; and full face amount Life Income Agreements. (Does NOT include pledge payments, revocable deferred gifts, or Gates Foundation match.)

	Major gifts	Percentage of gifts solicited*	Amount of major gifts	Amount of Gates Foundation gifts	Total amount
2017-18	1,587	23.4%	\$64.4 million	\$100.0 million	\$164.4 million
2016-17	1,572	27.2%	\$67.6 million	\$70.0 million	\$137.6 million
2015-16	1,128	19.6%	\$37.6 million	\$70.0 million	\$107.6 million
2014-15	1,057	22.9%	\$54.8 million	\$80.0 million	\$134.8 million
2013-14	985	24.0%	\$42.2 million	\$90.0 million	\$132.2 million
2012-13	861	19.7%	\$34.5 million	\$65.1 million	\$99.6 million
2011-12	860	19.7%	\$34.2 million	\$10.0 million	\$44.2 million
2010-11	753	18.2%	\$28.1 million	\$40.0 million	\$68.1 million
2009-10	626	19.6%	\$23.5 million	\$110.0 million	\$133.5 million
2008-09	551	10.9%	\$23.5 million	\$80.0 million	\$103.5 million

* Solicited gifts are the result of a direct solicitation of the donor by a Rotary volunteer or Foundation Gift Officer.

MAJOR GIFTS BY DESIGNATION*

	Designation	Number of gifts	Percentage of gifts solicited	Total	Percentage of total major gifts solicited
Annual Fund	Areas of Focus	7	42.9%	624	16.02%
	SHARE	603	15.8%		
	World Fund	14	14.3%		
Endowment Fund	Global Grants	73	74.0%	408	40.93%
	Peace Centers	72	47.2%		
	SHARE	196	36.2%		
	World Fund	66	12.1%		
	Other	1	0%		
PolioPlus Fund		157	33.1%	157	33.1%
Term Gifts	Global Grants	90	11.1%	94	13.8%
	Peace Centers	4	75.0%		
Global Grant Cash		171	5.3%	171	5.3%
Multiple Purposes**		133	22.6%	133	22.6%
Total				1,587	23.4%

* Includes the value of life income agreements and outside charitable trusts.

** Includes donors who made a gift but asked that it be used for multiple purposes.

2017-18 MAJOR GIFTS BY COUNTRY

	New major gifts	Change from 2016-17	Amount of new major gifts	Change from 2016-17
USA	544	-9.8%	\$25.8 million*	-18.9%
India	327	15.5%	\$9.7 million	-9.3%
Taiwan	207	21.8%	\$5.3 million	-10.2%
Korea	120	31.9%	\$4.9 million	96.0%
Japan	86	-8.5%	\$3.0 million	76.5%
Canada	59	-14.5%	\$3.2 million	-25.6%
Nepal	31	416.7%	\$0.4 million	33.3%
Philippines	21	-48.8%	\$0.4 million	-81.0%
Australia	19	-24%	\$5.7 million	307.1%
Thailand	19	-50%	\$0.5 million	-28.6%

* Excludes \$107.3 million from the Bill & Melinda Gates Foundation match.

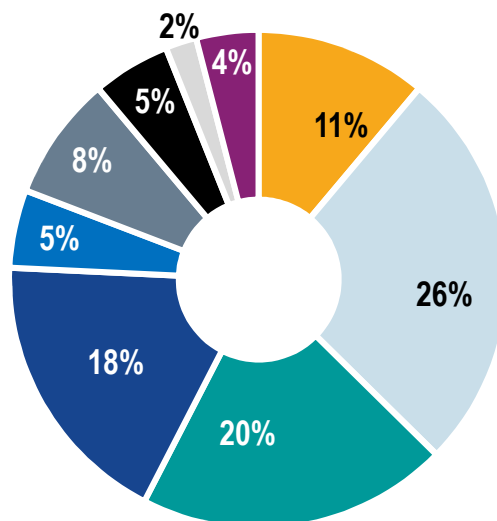
2017-18 SOLICITATIONS

A “solicitation” is the proactive presentation of a proposal for a specific gift amount and designation. Solicitations may be made for outright gifts, major gift pledges, bequests, life income agreements, or donor advised fund accounts. Please note that a gift solicited in one Rotary year may not be received the same year.

Designation	Proposals	Proposal amount
Annual Fund	163	\$11.9 million
Endowment Fund — SHARE	275	\$27.7 million
Endowment Fund — World Fund	77	\$21.6 million
Endowment Fund — Areas of Focus	88	\$18.8 million
Endowment Fund — Other	41	\$5.7 million
PolioPlus Fund	72	\$8.7 million
Rotary Peace Centers	54	\$5.3 million
No Designation	30	\$4.3 million
Donor Advised Fund	23	\$2.2 million
Total	823	\$106.2 million

SOLICITATIONS BY DOLLAR AMOUNT

- Annual Fund
- Endowment Fund — SHARE
- Endowment Fund — World Fund
- Endowment Fund — Areas of Focus
- Endowment Fund — Other
- PolioPlus Fund
- Rotary Peace Centers
- Donor Advised Fund
- No Designation



REALIZED ESTATE GIFTS

Estate gifts can include diverse planned giving vehicles, including bequests, charitable gift annuities, charitable remainder and lead trusts, gifts of retirement plan assets, and life insurance. Many of these gifts go to the Endowment Fund. The following realized estate gifts were for planned and legacy gifts exceeding \$10,000 and were received after the donor's death.

	Major gifts from realized estates	Total amount of major gifts from realized estates
2017-18	94	\$9.0 million
2016-17	93	\$15.2 million
2015-16	75	\$4.9 million
2014-15	68	\$5.0 million
2013-14	102	\$8.8 million
2012-13	65	\$8.1 million
2011-12	74	\$5.2 million
2010-11	78	\$6.4 million
2009-10	47	\$4.9 million
2008-09	69	\$5.1 million

NEW NAMED ENDOWED FUNDS BY COUNTRY AND SPENDING DESIGNATION

A total of 184 named endowed funds were established in 2017-18.

Country	New endowments	Total
United States	49	699
India	42	318
Japan	25	170
Taiwan	24	116
Canada	13	74
Other	31	275

Designation	New endowments	Total
SHARE	99	896
World Fund	17	299
Rotary Peace Centers	20	263
Global Grants	46	184
Polio	2	7
Other	0	3

LIFE INCOME AGREEMENTS

Rotarians and others establish life income agreements when they wish to receive benefits during their lifetime and, in some cases, the lifetime of survivors, and to leave a legacy with The Rotary Foundation. The donor receives a U.S. tax receipt for a portion of the face value of the gift and receives payments for a specified period. Generally, the residual amount is transferred to the Endowment Fund at the death of the survivor beneficiary. A charitable remainder trust can be funded with cash, real estate, publicly traded stock, closely held stock and certain other assets.

	Charitable remainder trusts*	Percentage of gifts solicited	Charitable remainder trusts (face value)	Charitable gift annuities	Percentage of gifts solicited	Charitable gift annuities (face value)
2017-18	8	87.5%	\$3.1 million	19	84.21%	\$3.6 million
2016-17	9	66.7%	\$2.3 million	30	90.0%	\$2.4 million
2015-16	8	100.0%	\$1.6 million	13	84.6%	\$0.5 million
2014-15	8	75.0%	\$3.0 million	27	92.6%	\$1.5 million
2013-14	11	72.7%	\$1.7 million	35	71.4%	\$1.5 million
2012-13	3	66.7%	\$0.3 million	27	88.9%	\$1.7 million
2011-12	2	100.0%	\$0.6 million	41	87.8%	\$1.6 million
2010-11	7	100.0%	\$1.1 million	40	92.5%	\$1.8 million
2009-10	6	0.0%	\$0.2 million	15	86.7%	\$0.9 million
2008-09	3	0.0%	\$0.01 million	27	81.5%	\$1.3 million

* Includes charitable remainder trust additions

BEQUEST SOCIETY

Rotary's Bequest Society recognizes as members those individuals and couples who include The Rotary Foundation in an estate plan for \$10,000 or more.

	New commitments	Percentage of gifts solicited	Average commitment amount	Total value of new commitments	Cumulative value of commitments
2017-18	647	33.8%	\$91,347	\$59.1 million	\$760.8 million
2016-17	1,174	27.3%	\$60,902	\$71.5 million	\$701.7 million
2015-16	666	25.1%	\$86,941	\$57.9 million	\$630.2 million
2014-15	799	24.0%	\$70,857	\$56.6 million	\$572.3 million
2013-14	698	33.0%	\$106,732	\$74.5 million	\$515.7 million
All-time	13,572		\$56,073		\$760.8 million

DONOR ADVISED FUND

Participating in the donor advised fund (DAF) is like having a foundation, only easier. Individual Rotarians and Rotary-affiliated groups may open an account with \$10,000 or more and recommend grants to their favorite U.S.-based, IRS-approved charities at their convenience. They decide how they want the funds invested and when to make grants to the charities. Rotary provides professional asset management and takes care of all the administrative details. Contributions to the donor advised fund are irrevocable and U.S. tax-deductible.

	Accounts	Percentage of new DAFs solicited*	Contributions	Grants and transfers	Fair market value
2017-18	334	9.6%	\$15.9 million	\$13.2 million	\$34.1 million
2016-17	303	3.3%	\$11.0 million	\$8.7 million	\$30.1 million
2015-16	279	4.7%	\$14.7 million	\$7.9 million	\$26.7 million
2014-15	255	3.1%	\$10.5 million	\$8.8 million	\$19.2 million
2013-14	234	5.6%	\$6.2 million	\$3.2 million	\$17.6 million
2012-13	201	0.0%	\$4.9 million	\$1.3 million	\$13.1 million
2011-12	170	0.0%	\$2.7 million	\$2.5 million	\$9.1 million
2010-11	145	0.0%	\$1.5 million	\$2.4 million	\$8.9 million
2009-10	132	0.0%	\$3.8 million	\$1.3 million	\$9.1 million
2008-09	131	0.0%	\$2.1 million	\$1.7 million	\$6.2 million

* Solicitations for new donor advised fund accounts began in 2013-14.

CUMULATIVE MAJOR GIFTS AND COMMITMENTS TO THE AREAS OF FOCUS MAJOR GIFTS INITIATIVES

Area of focus	Number of major gifts and commitments received 2017-18	Contributions received in 2017-18	Cumulative major gifts and commitments	Cumulative contributions
Basic education and literacy	120	\$3.8 million	286	\$9.7 million
Disease prevention and treatment	111	\$2.7 million	225	\$11.9 million
Economic and community development	41	\$2.3 million	91	\$4.0 million
Maternal and child health	76	\$3.6 million	179	\$12.3 million
Peace*	92	\$1.0 million	158	\$1.9 million
Water and sanitation	163	\$4.1 million	349	\$13.7 million

* Includes gifts to the Peace and Conflict Prevention and Resolution Area of Focus, but not the Rotary Peace Centers program.

DONOR RECOGNITION SUMMARY

	2017-18	Cumulative
Arch Klumph Society members	119	887
Major Donors	2,918	31,716
Bequest Society members	565	13,444
Benefactors	2,417	102,680
Paul Harris Fellows	50,496	1,674,785

PROGRAM SPENDING

GRANTS AWARD SUMMARY

The table below shows the grants awarded by The Rotary Foundation by program and type.

	2016-17	2017-18	Cumulative
PolioPlus			
Number of grants approved	67	63	N/A
Program awards	\$108.3 million	\$156.5 million	\$1.8 billion
	2016-17	2017-18	Cumulative
Rotary Peace Centers			
Fellows approved*	95*	94	1,270*
Program awards	\$4.6 million	\$4.0 million	\$67.0 million
	2016-17	2017-18	Cumulative
District grants			
Grants approved	494	503	2,466**
Program awards	\$25.8 million	\$27.4 million	\$126.1 million
	2015-16	2017-18	Cumulative
Global grants			
Grants approved	1,260	1,306	5,677**
Program awards	\$72.9 million	\$76.9 million	\$332.1 million
	2016-17	2017-18	Cumulative
Packaged grants***			
Grants approved	10	10	64**
Program awards	\$2.4 million	\$0.4 million	\$4.1 million

* These figures do not include fellows who relinquished or were withdrawn from the program.

** For district, global, and packaged grants, the cumulative figure includes only grants approved since the full launch of the current grant model in July 2013.

*** Although packaged grants were formally phased out in 2013-14, scholarships for study at UNESCO-IHE, a program begun under packaged grants, continued to be awarded.

Note: Program awards include payments for grants, accruals for approved grants that have not yet been paid, currency exchange gains and losses, and return of funds and write-offs for closed, canceled, or relinquished grants.

POLIOPLUS

Polio eradication is Rotary's top philanthropic priority. Since 1988, when Rotary began working with its partners in the Global Polio Eradication Initiative to immunize more than 2 billion children worldwide, the incidence of polio has decreased by 99.9 percent.

POLIOPLUS GRANTS

The table below shows the grants awarded by The Rotary Foundation to UNICEF, the World Health Organization, and other agencies for polio eradication activities.

Date	Country/Region	Beneficiary	Amount	Purpose
Jun-18	Afghanistan	UNICEF	\$6,955,000	Social Mobilization
Sep-17	Afghanistan	UNICEF	4,953,704	Social Mobilization
Sep-17	Afghanistan	WHO	4,370,507	Operational Support
Jan-18	Afghanistan	UNICEF	2,088,295	Social Mobilization
Jan-18	Afghanistan	UNICEF	784,852	Technical Assistance
Jan-18	Afghanistan	WHO	9,160,859	Operational Support
Jun-18	Afghanistan	WHO	9,095,000	Operational Support
Sep-17	African Region	WHO	5,743,293	Surveillance
Jan-18	Cameroon	WHO	1,605,000	Operational Support
Jun-18	Cameroon	WHO	98,588	Operational Support
Jan-18	Central African Republic	WHO	428,000	Operational Support
Jun-18	Central African Republic	WHO	394,391	Operational Support
Jan-18	Chad	UNICEF	353,156	Social Mobilization
Sep-17	Chad	WHO	2,368,341	Operational Support
Jan-18	Chad	UNICEF	1,981,285	Technical Assistance
Jun-18	Chad	WHO	511,747	Operational Support
Sep-17	Democratic Republic of Congo	WHO	4,496,229	Operational Support
Jan-18	Democratic Republic of Congo	UNICEF	577,800	Operational Support
Jan-18	Democratic Republic of Congo	UNICEF	949,197	Social Mobilization
Jan-18	Democratic Republic of Congo	UNICEF	641,782	Technical Assistance
Jan-18	Democratic Republic of Congo	WHO	4,315,667	Operational Support
Jun-18	Democratic Republic of Congo	WHO	1,761,688	Operational Support
Sep-17	Eastern Mediterranean Region	WHO	2,000,000	Surveillance
Jan-18	Ethiopia	WHO	1,819,000	Operational Support
Sep-17	Guinea	WHO	961,211	Operational Support
Jun-18	Guinea	WHO	527,321	Operational Support
Jun-18	India	MOH	896,000	Syringes
Jan-18	Iraq	WHO	1,999,941	Operational Support
Jun-18	Madagascar	WHO	690,012	Operational Support
Jun-18	Mali	WHO	923,201	Operational Support
Aug-17	Nepal	NPPC	9,835	Operations
Jan-18	Niger	WHO	1,712,000	Operational Support
Jun-18	Niger	WHO	85,273	Operational Support

Jun-18	Nigeria	UNICEF	8,179,010	Social Mobilization
Sep-17	Nigeria	UNICEF	5,071,523	Technical Assistance
Sep-17	Nigeria	UNICEF	307,663	Social Mobilization
Sep-17	Nigeria	UNICEF	2,332,348	Operational Support
Jun-18	Nigeria	UNICEF	494,799	Operational Support
Jun-18	Nigeria	UNICEF	107,533	Technical Assistance
Sep-17	Pakistan	UNICEF	6,935,185	Social Mobilization
Sep-17	Pakistan	WHO	1,999,830	Surveillance
Jan-18	Pakistan	UNICEF	7,074,254	Social Mobilization
Jan-18	Pakistan	UNICEF	901,210	Technical Assistance
Jan-18	Pakistan	WHO	11,336,194	Operational Support
Jun-18	Pakistan	UNICEF	9,630,000	Operational Support
Jun-18	Pakistan	WHO	4,012,500	Operational Support
Jan-18	Polio Research Committee	WHO	731,338	Research
Jun-18	Polio Research Committee	WHO	494,966	Research
Jun-18	Polio Research Committee	WHO	1,441,076	Operations
Jun-18	Sierra Leone	WHO	245,308	Operational Support
Sep-17	Somalia	UNICEF	1,624,821	Social Mobilization
Jan-18	Somalia	UNICEF	1,738,061	Technical Assistance
Jan-18	Somalia	WHO	1,552,387	Operational Support
Jun-18	Somalia	WHO	776,194	Operational Support
Sep-17	South Sudan	UNICEF	1,011,006	Social Mobilization
Jan-18	South Sudan	UNICEF	835,291	Technical Assistance
Jun-18	South Sudan	WHO	669,866	Operational Support
Sep-17	South Sudan	UNICEF	2,763,750	Operational Support
Sep-17	Sudan	WHO	2,560,589	Operational Support
Jun-18	Sudan	WHO	2,556,785	Operational Support
Jan-18	Syria	WHO	428,000	Operational Support
Jun-18	West and Central Africa Region	UNICEF	467,817	Technical Assistance
Jan-18	West and Central Africa Region	UNICEF	517,991	Technical Assistance
		Total	\$154,055,470	

POLIOPLUS PARTNERS GRANTS

PolioPlus Partners grants provide funding for Rotarian-led social mobilization and surveillance activities in polio-endemic countries and high-risk countries. In 2017-18, there were a total of 12 PolioPlus partners grants approved, as outlined in the chart below:

Project number	Project name	Project total	Date
1	2017-18 Pakistan National Immunization Days	\$804,534	27 Jul 2017
2	2017-18 Afghanistan National Immunization Days	224,936	28 Jul 2017
3	2017-18 Nigeria National Immunization Days	442,915	1 Aug 2017
4	2017-18 Nepal National Immunization Days	28,127	1 Aug 2017
5	2017-18 Mali National Immunization Days	190,442	1 Sep 2017
6	2017-18 India Special Project	153,750	1 Sep 2017
7	2017-18 Cote d'Ivoire National Immunization Days	200,000	1 Oct 2017
8	2017-18 Mali National Immunization Days	97,389	1 Jan 2018
9	CDC Foundation Heroes Fund	50,000	31 Jan 2018
10	2017-18 Democratic Republic of Congo National Immunization Days	334,300	1 Mar 2018
11	2017-18 Cote d'Ivoire National Immunization Days II	150,000	1 Apr 2018
12	2018-19 Mali National Immunization Days (paid in 2017-18)	237,209	1 Jun 2018
	TOTAL	\$2,913,602	

ROTARY PEACE CENTERS

Through academic training, study, and practice, the Rotary Peace Centers program develops leaders who become catalysts for peace and conflict prevention and resolution in their communities and around the globe. Each year, up to 100 Rotary Peace Fellows are chosen to participate in a master's degree or certificate program at one of our partner universities. Fellows study subjects related to the root causes of conflict and explore innovative solutions that address real-world needs. We have peace centers around the globe at:

- Chulalongkorn University, Bangkok (certificate program)
- Duke University and University of North Carolina at Chapel Hill, USA
- International Christian University, Tokyo
- University of Bradford, England
- University of Queensland, Brisbane, Australia
- Uppsala University, Sweden

Fellowships awarded in 2017-18	94
Fellows' home countries	44
Fellows from low-income countries	45
Average age of fellows	36

DISTRICT GRANTS

District grants fund small-scale, short-term activities that address needs in the local community or communities abroad. Each district chooses activities to fund with these grants, provided that the activities align with the mission of The Rotary Foundation.

Grants approved in 2017-18	503
Program awards*	\$27.4 million
Total funding**	\$28,503,594
Average grant amount	\$56,667

*Program awards include payments for grants, accruals for approved grants that have not yet been paid, currency exchange gains and losses, and return of funds and write-offs for closed, canceled, or relinquished grants.

**Total funding includes DDF awards for district grants approved during the program year.

TOP 10 RECIPIENT COUNTRIES BY NUMBER OF GRANTS

(BASED ON LOCATION OF THE DISTRICT
RECEIVING THE GRANT)

Country	Grants
United States	147
Brazil	37
Japan	34
India	28
Australia	21
England	21
Korea, Republic of	19
France	18
Germany	15
Canada	13

TOP 10 RECIPIENT COUNTRIES BY GRANT AMOUNT

(BASED ON LOCATION OF THE DISTRICT
RECEIVING THE GRANT)

Country	Amount
United States	\$10,339,860
Japan	\$3,162,887
Korea, Republic of	\$3,094,527
Taiwan	\$1,245,754
India	\$1,234,763
Canada	\$1,067,415
Brazil	\$998,105
Germany	\$981,357
Australia	\$844,619
Italy	\$693,663

GLOBAL GRANTS

Global grants support large international activities with sustainable, measurable outcomes in Rotary areas of focus. Grant sponsors form international partnerships to support activities that respond to community needs.

Grants approved in 2017-18	1,306
Program awards*	\$76.9 million
Total funding**	\$86,677,399
Average grant amount	\$66,369

* Program awards include payments for grants, accruals for approved grants that have not yet been paid, currency exchange gains and losses, and return of funds and write-offs for closed, canceled, or relinquished grants.

** Total funding includes cash contributions, DDF contributions and the World Fund match for grants approved during the program year.

GRANTS BY PRIMARY AREA OF FOCUS

Area of focus	Number	Amount
Basic education and literacy	174	\$10,998,136
Disease prevention and treatment	483	\$35,660,986
Economic and community development	182	\$10,503,910
Maternal and child health	102	\$7,204,677
Peace and conflict prevention/resolution	82	\$3,547,899
Water and sanitation	283	\$18,761,791

GRANTS BY ACTIVITY TYPE

Area of focus	Number	Amount
Humanitarian	1,032	\$73,328,718
Humanitarian/Scholar	1	\$55,535
Humanitarian/Vocational training team	29	\$2,630,824
Scholar	200	\$7,428,913
Vocational training team	44	\$3,233,409

TOP 10 RECIPIENT COUNTRIES BY NUMBER OF GRANTS (BASED ON PROJECT LOCATION)

Country	Grants
India	234
England	90
Thailand	78
Philippines	64
Mexico	57
United States	57
Taiwan	52
Brazil	36
Korea, Republic of	33
Nepal	25

TOP 10 RECIPIENT COUNTRIES BY GRANT AMOUNT (BASED ON PROJECT LOCATION)

Country	Amount
India	\$18,059,726
Thailand	\$4,373,401
Mexico	\$4,087,292
Philippines	\$3,495,280
England	\$3,282,769
Taiwan	\$3,016,624
United States	\$2,645,939
Nepal	\$2,526,676
Brazil	\$2,442,237
Nigeria	\$2,115,127