

DOING GOOD IN THE WORLD

From Foundation Walk to Grants

2023-24 D7070 Qualification Process

- For Rotarians and Rotaractors in D7070

Module 1 – The Rotary Foundation

Module 2 – Grants;
Global, District & Others

Please, read the Speaker notes for each slide





THE FOUNDATION'S MISSION



Advance World Understanding, Goodwill & Peace through the improvements of health, the support of education , and the elevation of poverty

Rotary



ROTARY'S FIRST PROJECT IN CHICAGO 1907



Rotary's first community project was the installation of a public comfort station in Chicago.

In 1907, the Rotary Club of Chicago (Club #1) convinced Chicago's City Council to set aside \$20,000 (\$500,000 today) across the city for public comfort stations for women and men.

ROTARY & THE ROTARY FOUNDATION



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 Vision Statement

The Rotary Foundation is the perfect tool to fulfill Rotary's Vision Statement

- Increase our impact
 - The grants program opens up many opportunities to take action
- Expand our reach
 - There are opportunities to do good in new forms and at new locations, but also possible to identify new donors
- Enhance participant engagement
 - Encourage Rotarians and Rotaractors to become actively involved in Foundation activities, from fund-raising to project implementation
- Increase our ability to adapt
 - The last year has shown how Rotarians and the Rotary Foundation can adapt to new realities



THE ROTARY FOUNDATION – THE BEGINNING



At the 1917 convention, outgoing Rotary president Arch Klumph proposed setting up an endowment “for the purpose of doing good in the world.” That one idea, and an initial contribution of \$26.50, set in motion a powerful force that has transformed millions of lives around the globe.

THE ROTARY FOUNDATION – A BRIEF HISTORY

The Rotary Foundation transforms your gifts into service projects that change lives both close to home and around the world.

- ❖ In 1917, Rotary President Arch Klumph proposes the establishment of an endowment for doing good at the Rotary Convention. First contribution, \$26.50 from the Rotary Club of Kansas City, Missouri
- ❖ In 1930, \$500 is awarded to the International Society for the Crippled Children (polio)
- ❖ In 1947, Rotarians contribute \$1.3 million in Paul Harris's memory
- ❖ Paul Harris Fellow recognition is introduced in 1957
- ❖ In 1963, the Matching Grants program is introduced, launched in 1965
- ❖ In 1967, 3H – Health, Hunger, Humanity – grants expand service
- ❖ In 1985, the PolioPlus program is launched
- ❖ In 2007, The Bill & Melinda Gates Foundation first contribution (\$100 million) to PolioPlus
- ❖ The current Global & District Grants model is introduced to all Districts in 2013

During the past 100 years, the Foundation has spent \$3 billion on life-changing, sustainable projects. With your help, we can make lives better in your community and around the world



THE ROTARY FOUNDATION'S THREE FUNDS

The Rotary Foundation won't work without donations! You can give to the following three main funds

❖ Endowment Fund

- ❖ Ensures long-term stability of the Foundation's grants and programs
- ❖ Contributions DO NOT qualify for Paul Harris recognition

❖ Annual Fund

- ❖ Primary source of funding for TRF's local and international grants and programs
- ❖ Contributions qualify for Paul Harris recognition

❖ PolioPlus Fund

- ❖ Contributions are used for the End Polio Now campaign
- ❖ Contributions qualify for Paul Harris recognition

❖ Additional Funds

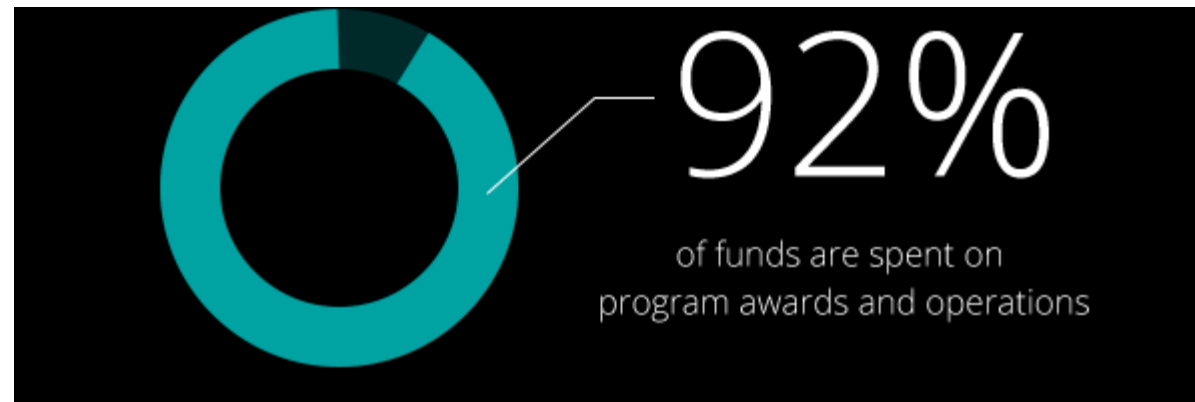
- ❖ Disaster Response Fund, Ukraine Disaster Response Fund, etc

THE ROTARY FOUNDATION – HIGHLY REGARDED



Four Stars
out of Four

> 90 % are
spent on
programs



Donate with Confidence!!!

WHAT IS THE IMPACT OF DONATING?



- \$50 can provide clean water to help fight waterborne illness.
- \$500 can launch an antibullying campaign and create a safe environment for children.
- \$5,000 can buy vaccine to immunize 10,000 children against polio

Any gift can be donated to a specific fund – End Polio Now, an individual global grant, or one of Rotary’s areas of focus.

Illustrations by Gwen Kereval



(US currency)

MANY WAYS OF DONATING

Donations to the Rotary Foundation can be made

- on-line at www.rotary.org
- by cheque to The Rotary Foundation or The Rotary Foundation (Canada)
- one time or recurrently through arrangements with your bank
- honouring someone
- to various funds or projects of the Rotary Foundation
- with matching from over 15,000 participating employers

EVERY
ROTARIAN
EVERY
YEAR

DONATE BY VISITING www.rotary.org

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.

<input checked="" type="radio"/> Annual Fund-SHARE Learn more	<input type="radio"/> Polio Fund Learn more
<input type="radio"/> World Fund Learn more	<input type="radio"/> Disaster Response Fund Learn more
<input type="radio"/> Pakistan Flood Response Fund Learn more	<input type="radio"/> Ukraine Response Fund Learn more

It is easy to donate to the Rotary Foundation. Visit www.rotary.org and click on DONATE. The Annual Fund is the default setting. If you want to give to another fund, click on it and you will be able to donate to that fund.



DONOR RECOGNITION – INDIVIDUALS

The generous contributions by you and others to the Rotary Foundation are essential in securing and growing Rotary programs throughout the world and are recognized by TRF

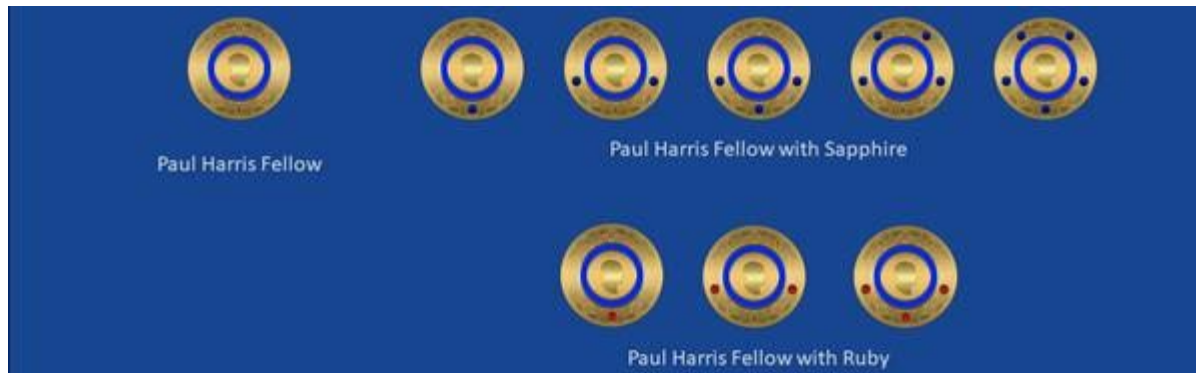
- ❖ **Rotary Foundation Sustainable Member**, min \$100 per year
- ❖ **Benefactor**; min. \$1,000 in cash or estate planning to the Endowment Fund
- ❖ **Paul Harris Fellow**; \$1,000 donated to the Annual Fund or PolioPlus
- ❖ **Multiple Paul Harris Fellow**; every additional \$1,000 donated to the Annual Fund or PolioPlus
- ❖ **Paul Harris Society Member**; when you donate min. \$1,000 every year to the Annual Fund or PolioPlus
- ❖ **Bequest Society**; when you donate \$10,000 or more through your estate planning. (10 levels)
- ❖ **Major Donor**; when your cumulative donations reach \$10,000 (4 levels)
- ❖ **Arch Klumph Society**; when your cumulative donations reach \$250,000 (6 levels)

For more information, please visit <https://www.rotary.org/en/donate/recognition>

EXAMPLES OF DONOR RECOGNITION



Donations to Foundation funds, with the exception of the Endowment Fund, will give Paul Harris credits, one per dollar. Once you reach 1,000 you will be awarded a Paul Harris Fellowship Award. Each 1,000 credits will result in multiple Paul Harris. Once you reach 10,000 credits, you become a Major Donor



DONOR RECOGNITION - CLUBS

The Rotary Clubs are very important in motivating members to donate to The Rotary Foundation. Therefore, TRF has also introduced a number of Club recognitions.

- ❖ **100% Paul Harris Fellow Club**; all dues-paying members are Paul Harris Fellows
- ❖ **100% Paul Harris Society Club**; clubs where every dues-paying member contribute min. \$1,000 per year to the Annual Fund or PolioPlus
- ❖ **100% Foundation Giving Club**; clubs with an average giving during a Rotary year to TRF funds of min. \$100 per member, 100% participation of dues-paying members and a min. \$25 from members
- ❖ **Every Rotarian Every Year Club**; clubs that during a Rotary year give an average of at least \$100 per member to the Annual Fund or PolioPlus and every dues-paying member donating at least \$25 during the Rotary year
- ❖ **Top Three Per Capita in Annual Fund Giving**; the three Clubs in each District that give most per capita giving to the Annual Fund during a Rotary year are recognized with a banner. Only Clubs with an average donation of \$50 per capita are eligible.

For more information, please visit <https://www.rotary.org/en/donate/recognition>



ACTIVITIES/PROGRAMS OF THE FOUNDATION

The Rotary Foundation is spending its funds on three different programs

❖ PolioPlus

- From 350,000 cases (120+ countries) in 1985 to <50 (2 countries) in 2021
- Rotary has contributed >USD1.6 billion & a huge number of volunteer hours
- Works with WHO, CDC, UNICEF, Gates Foundation & governments
- Funded by PolioPlus fund & DDF

❖ Rotary Peace Fellowships

- Graduate degree in international relations, peace, conflict resolution at six universities around the world
- Districts nominate by July 1 for worldwide competition
- Funded by DDF, Endowment Fund & World Fund

❖ Grants

- District Grants & Global Grants (Humanitarian, VTT & Scholarships)
- Funded by DDF & World Fund

WHO CAN PARTICIPATE IN THE GRANTS PROGRAM?

Only Qualified Rotary and Rotary Clubs can take part in the Rotary Foundation's Grants Program

To qualify, Rotary & Rotaract Clubs must

- have min. 2 members complete the District's Qualification Training either by taking the three on-line modules represent the training or attending specific District Foundation seminars, such as November 19, 2022, &
- sign a Memorandum Of Understanding (MOU), found on the District website. (President & President-Elect)

The Certification is valid for One Year. The Club as a whole is responsible for all matters related to the Rotary Foundation once qualified, not just the 2 members taking the training.

N.B. Clubs must remain qualified throughout the life of the project.

THE MOU – A CRUCIAL PART OF GRANTS PROCESS

The MOU is an important document, covering the following

- ❖ Terms of Club Qualification
 - ❖ For one year; The Club in its entity responsible for the Grant
- ❖ Club Leadership Responsibilities for Qualification
 - ❖ A Club member to be appointed in charge of Grant management; 2 members must take training
- ❖ Financial Management
 - ❖ For Global Grants, a separate bank account is required; funds can only be used for project activities; two Club members required for signing cheques; receipts and book-keeping a must
- ❖ Document Retention
 - ❖ Keep documents in a safe – and known – place for at least 5 years
- ❖ Report on Use of Grant Funds
 - ❖ Progress reports each 12th month; Final report max. 2 months after project completion
- ❖ Method for Reporting and Resolving Misuse of Grant Funds
 - ❖ Club must report any potential misuse or irregularities of funds to District Governor
- ❖ Authorization and Agreement
 - ❖ Signed by President and President Elect

THE SHARE SYSTEM 2023-24 – The Annual Fund



District 7070

Donations to the Annual Fund 2020-21

- > USD324K
- > Invested 3 years

July 1, 2023

- > D7070 will receive USD154K as DDF (District Designated Funds) D7070 decides how to use DDF (Club cash match of Global Grants, District Grants, transfer to PolioPlus and/or Peace Ctr)
- > The World Fund will receive USD154K and similar ‘halves’ from every Rotary District. World Fund is used for the TRF Award to Global Grants, and
- > USD16K to TRF Admin

YOUR CLUB IS QUALIFIED – *once ...*

*Only Qualified Clubs
Can Apply for Grants*



- ...
- at least two Club members have either completed the on-line Grant Qualification Training for the Rotary year 2023 – 24, or attended specific District Foundation seminars, and
- your Club has signed the MOU
- Record of qualified Clubs will be kept on the District's website

End of Module 1. Please, take the related quiz.

<https://www.surveymonkey.com/r/682PZFR>

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Thank You

