

# DOING GOOD IN THE WORLD

## *From Foundation Walk to Grants*

**2024-25 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 ROTARY FOUNDATION'S 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.*

# 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 it is 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 years have 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 establishing 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.**

- ❖ 1917, The Rotary Foundation is established.
- ❖ 1930, \$500 is awarded to the International Society for the Crippled Children (polio)
- ❖ 1947, Rotarians contribute \$1.3 million in Paul Harris's memory
- ❖ 1957 Paul Harris Fellow recognition is introduced
- ❖ 1963, the Matching Grants program is introduced, launched in 1965
- ❖ 1967, 3H – Health, Hunger, Humanity – grants expand service
- ❖ 1985, the PolioPlus program is launched
- ❖ 2007, The Bill & Melinda Gates Foundation first contribution (\$100 million) to PolioPlus
- ❖ 2013 The current Global & District Grants model is introduced to all Districts

**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, your family & friends, Rotarians & everyone else can donate!**

## ❖ 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

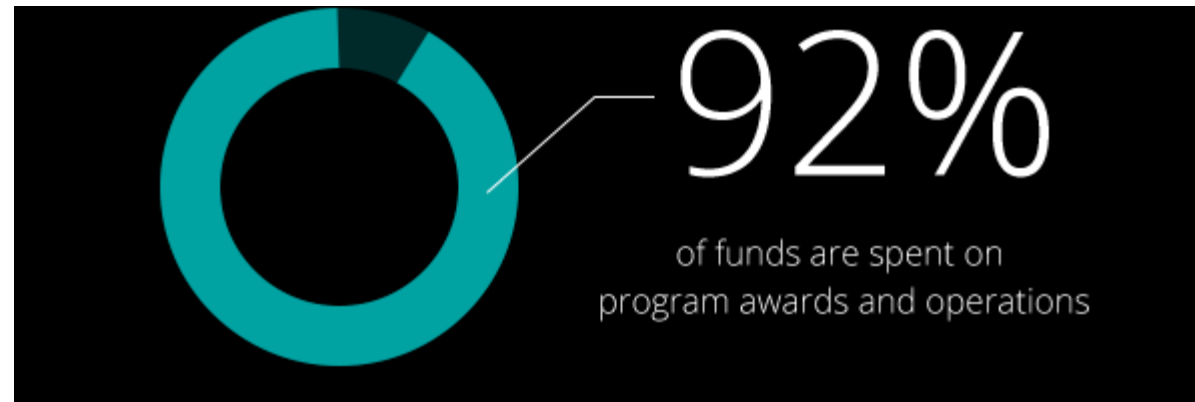
# THE ROTARY FOUNDATION – HIGHLY REGARDED

***Donate with Confidence!!!***



Four Stars  
out of Four

> 90 % of  
donations  
are spent on  
programs





# 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)

# YOU CAN DONATE IN MANY WAYS

## Donations to the Rotary Foundation can be made

- on-line at [www.rotary.org](http://www.rotary.org) or [www.trfcanda.org](http://www.trfcanda.org)
- by cheque to The Rotary Foundation or The Rotary Foundation (Canada)
- one time or recurrently through arrangements with your bank
- to honour someone
- to various funds or projects of the Rotary Foundation
- with matching from over 15,000 participating employers. Is yours one of them?

EVERY  
ROTARIAN  
EVERY  
YEAR

# DONATE BY VISITING [www.rotary.org](http://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"/> <b>Annual Fund-SHARE</b> Learn more	<input type="radio"/> <b>Polio Fund</b> Learn more
<input type="radio"/> <b>World Fund</b> Learn more	<input type="radio"/> <b>Disaster Response Fund</b> Learn more
<input type="radio"/> <b>Pakistan Flood Response Fund</b> Learn more	<input type="radio"/> <b>Ukraine Response Fund</b> Learn more

It is easy to donate to the Rotary Foundation. Visit [www.rotary.org](http://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 particular fund.



# DONOR RECOGNITION – INDIVIDUALS

The generous donations from you and others to the Rotary Foundation are essential in securing and growing Rotary programs around the world. They are recognized by TRF

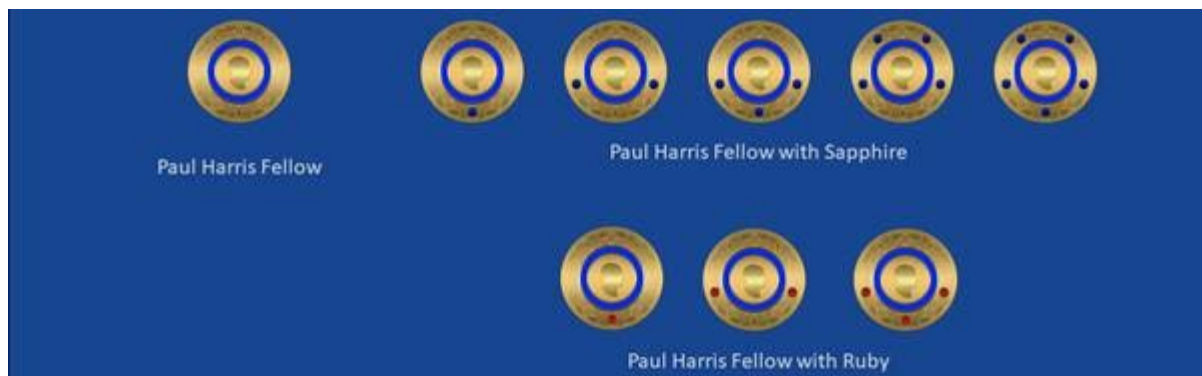
- ❖ **Rotary Foundation Sustainable Member**, min USD100 per year
- ❖ **Benefactor**; min. USD1,000 in cash or estate planning to the Endowment Fund
- ❖ **Paul Harris Fellow**; USD1,000 donated to the Annual Fund or PolioPlus
- ❖ **Multiple Paul Harris Fellow**; every additional USD1,000 donated to the Annual Fund or PolioPlus
- ❖ **Paul Harris Society Member**; when you donate min. USD1,000 every year to the Annual Fund or PolioPlus
- ❖ **Bequest Society**; when you donate USD10,000 or more through your estate planning. (10 levels)
- ❖ **Major Donor**; when your cumulative donations reach USD10,000 (4 levels)
- ❖ **Arch Klumph Society**; when your cumulative donations reach USD250,000 (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 US 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. USD100 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 USD100 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 USD50 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 <15 (2 countries) in 2023
- Rotary has contributed >USD2.6 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 five universities around the world, or a Professional Development Certificate Program at two universities
- Districts nominate by July 1 for worldwide competition
- Funded by DDF, Endowment Fund & World Fund

### ❖ Grants

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

# WHO CAN PARTICIPATE IN THE GRANTS PROGRAM?

## Rotary and Rotary Clubs MUST be Qualified to participate in the Rotary Foundation's Grants Program

### Rotary & Rotaract Clubs are qualified when they ...

- have min. 2 members complete the District's Qualification Training either by completing the two D7070 on-line Foundation training modules, or attending specific District Foundation seminars, such as November 18, 2023, and
- sign a Memorandum Of Understanding (MOU) with the District (President & President-Elect). The form is available on the District website.

***The Qualification is valid for One Year. The Club as a unite is responsible for all matters related to the Rotary Foundation, not just the members taking the training and/or writing the application.***

***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 is 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 12<sup>th</sup> 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 2024-25 – The Annual Fund



Donation is invested for 3 years; growth supports Foundation operations.

SPENDING DECISIONS SHARED

**World Fund**  
(Trustee discretion)



GLOBAL GRANTS AND PROGRAMS\*

**District Designated Funds (DDF)**  
(District discretion)



DISTRICT GRANTS GLOBAL GRANTS

\*Includes PolioPlus, Rotary Peace Centers, other districts, and the Endowment Fund (areas of focus)

## District 7070

Donations to the Annual Fund 2021-22

- > USD351K
- > Invested 3 years

July 1, 2024

- > D7070 will get access to min.USD167K 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 Center)
- > The World Fund will receive USD164K and similar 'halves' from every Rotary District. World Fund is used for the TRF Award to Global Grants, and
- > USD17K to TRF Admin

*The DDF amount received will likely be somewhat larger (USD10K) thanks to D7070 related contributions from the Endowment Fund*

# 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 2024 – 25, 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>

For more information: PDG Lars Henriksson  
[pdglars.henriksson@gmail.com](mailto:pdglars.henriksson@gmail.com)



*Thank You*

