Rotary Foundation Motto:

DOING GOOD IN THE WORLD

CREATE HOPE
in the WORLD

Rotary District 5730

The Rotary Foundation

Grant Certification

The Rotary Foundation

District 5730

Rotary

Club Qualification

Why do we need to be certified?

- **Want more Rotarians with basic Foundation and grant understanding**
- **Club leadership changes each year**
- **Qualified members move**
- **Requirement from RI for districts and clubs to participate**

Rotary

Rotary International ⟷ The Rotary Foundation

Rotary International ⟷ The Rotary Foundation

Rotary International

- Founded 1905
- 501(c)(4) Not-For-Profit Corporation
- Dues
- Rotarians can participate in all Programs
- International President & President-Elect
  17 Directors

The Rotary Foundation

- Founded 1917
- 501(c)(3) Charitable Corporation, not-for-profit
- Voluntary contributions
- Rotarians cannot benefit
- 1930 – first grant awarded
- Trustee Chair, Chair Elect, Vice Chair, 12 Trustees

STARTING WITH WHY

WHY A FOUNDATION?

- **Charitable purposes** – tax benefits for contributors, 501(c)(3)

- **Contains different supervision than our Rotary Organization**
  Trustee Chair, Chair Elect, Vice Chair and 12 additional Trustees

- **Contains different Management Structures than RI**

- **Supports the The 4th Object of Rotary** – "The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service."

Rotary

Top Ranking World Charity

TRF maintains 4-Star rating

100% designation as a charity

The highest rating available

from CharityNavigator.com

Focus:

Making our world,

not as it is but what the world could be….

Rotary

What would it take to change the world?

Our Rotary Foundation starts with each Rotarian's commitment to
Service Above Self

Rotary

It Just Takes One

The Idea and the Gift !

US $40 HELPS PROVIDE

School supplies

Malaria tests

Water Filters for Communities

Mosquito netting

Desks for Elementary students

Rotary

Provides 9000 people with inexpensive clean drinking water

Result: Lower incidents of water-borne illnesses. Healthier children.

5 year filter life if properly maintained.

2nd GG was approved for additional communities

Rotary

US $100 HELPS PROVIDE

Polio Immunizations for 150 children

Matched 2:1 by the Bill and Melinda Gates Foundation

Rotary

US $1,000 HELPS PROVIDE

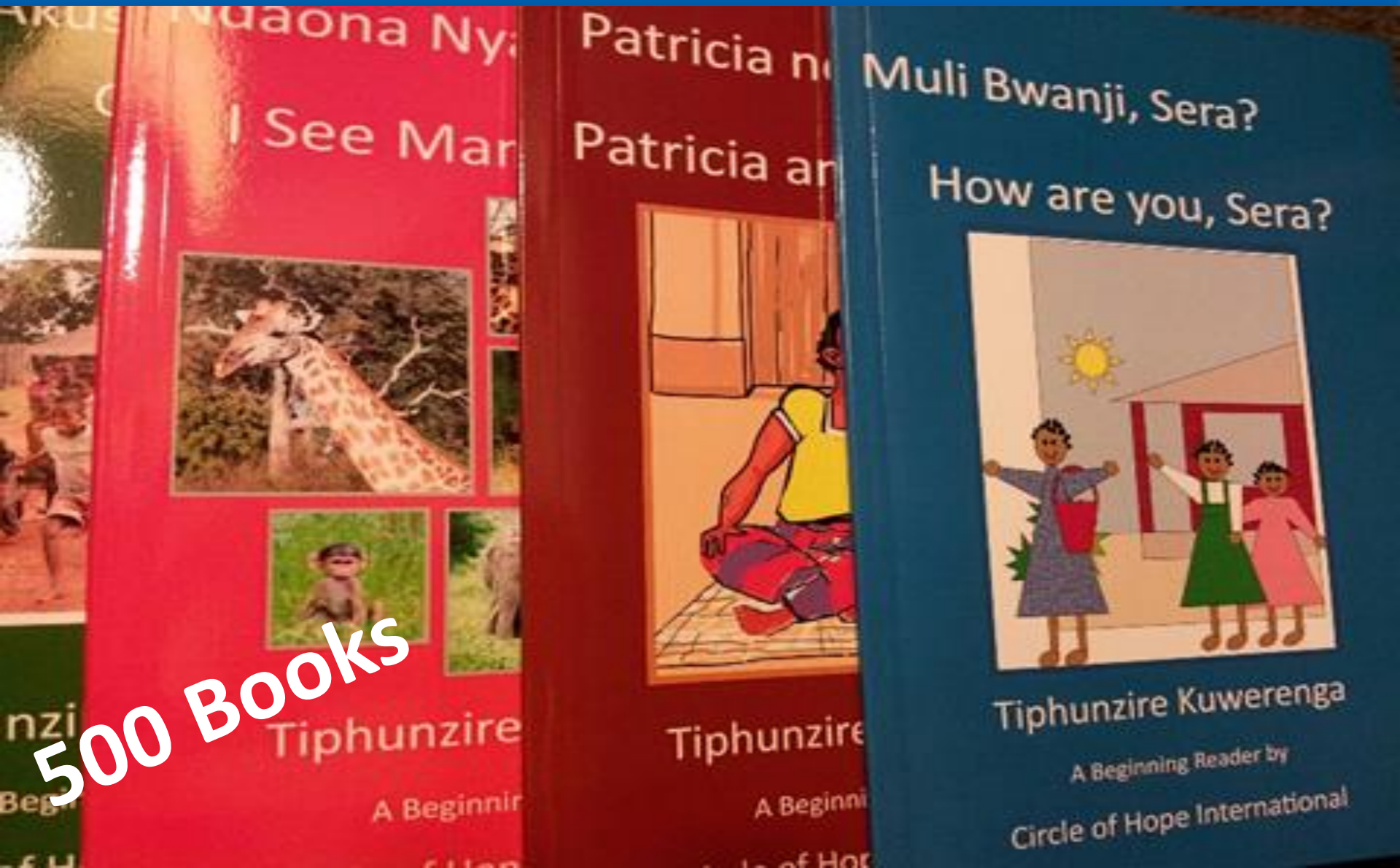
Mobility for disabled youth

Domestic abuse education

Portable dental kit

Books for the Schools in Grace Village, Africa

District or Global Grant Funds



500 Books

The Rotary Foundation

MAJOR FUNDS

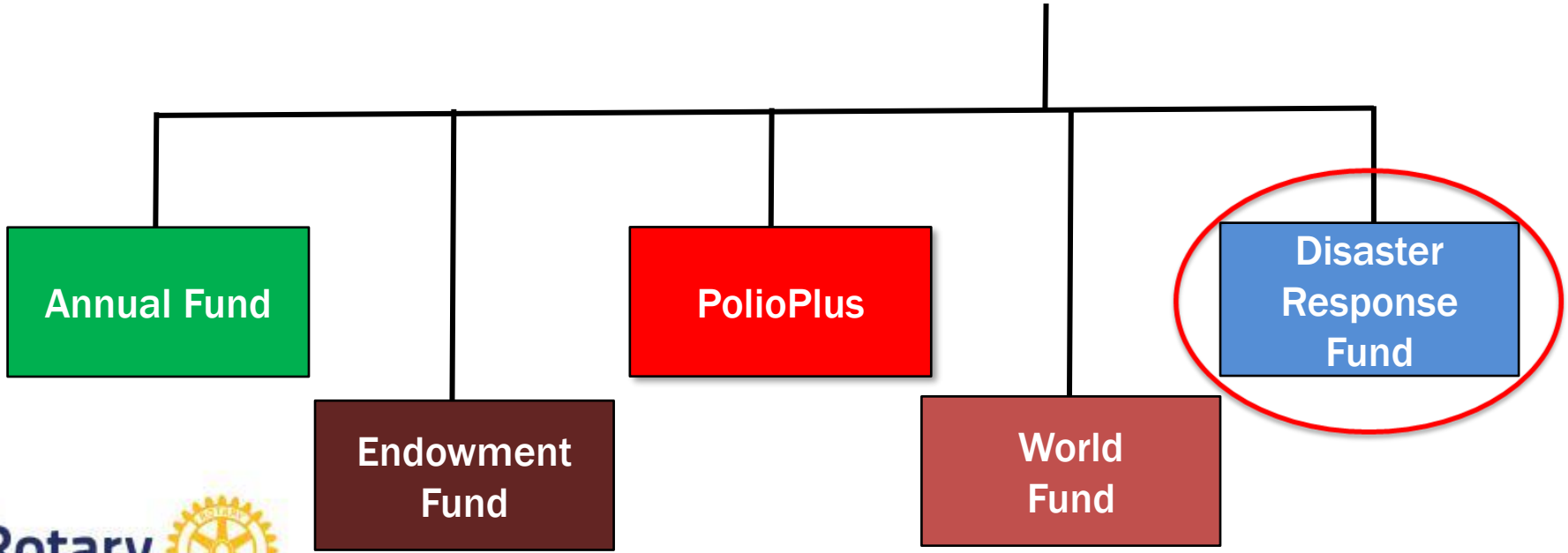
The Rotary Foundation

A family of Funds

Service Above Self

Doing Good in the World

Rotary — The Rotary Foundation



Rotary

Multiple funds working toward a common goal

Disaster Response Fund

- Provides disaster recovery and support rebuilding efforts where the need is greatest
- Contributions are combined and made available through Rotary Disaster Response Grants.
- Maximum Grant is $25,000. Only Districts can apply.

Rotary

Disaster Response Fund

- Contributions count towards PHF recognition

- Contributions cannot be directed to a specific disaster.
  <u>Several exceptions:</u>

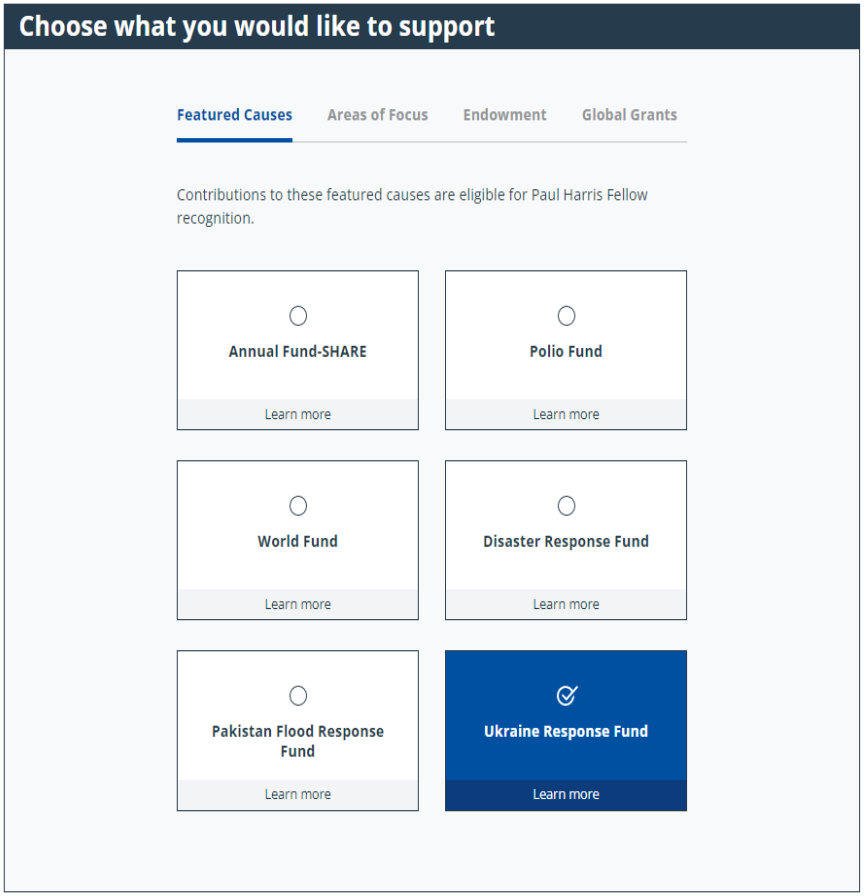
  1. 2020 : 339 Disaster Relief Grants mostly COVID related
  2. 2022 : $15 million plus in a designated humanitarian fund for Ukraine (to June 1, 2024)
  3. 2023 : Designated fund for rebuilding Turkey and Syria (to March 2023)
  4. 2023: Designated fund for Pakistan Flood Response (to June 1, 2024)

Rotary

Disaster Response Fund

To make a Donation:

- Log into **rotary.org** and **sign in**.
- Select the “Donate” box at the top of the page.
- Select the Fund, select the amount to donate and pay with a Credit card



Rotary

Disaster Response Grants

High Plains Food Bank, Amarillo

$ 8,350 Disaster Grant

South Plains Food Bank, Lubbock

$ 8,350 Disaster Grant

Covid Grant

West Texas Food Bank, Midland/Odessa

$ 8,350 Disaster Grant

Rotary

Disaster Response Fund

TRF made other exceptions: <u>Ukraine</u>

1. Districts were able to partner with each other, minimum $25,000 per district
2. D5730 was the lead district with 8 other districts on a $200,000 grant to refurbish buildings in Kharkiv, Ukraine, with shelter, electricity, and water.
3. TRF Designated Fund for Ukraine for contributions and grant applications
4. Donations accepted until December 30, 2023 to be spent by June 2024.

Disaster Response Fund

TRF made other exceptions: <u>Pakistan</u>

1. TRF Designated a Fund for Pakistan for donations through December 31, 2023, to be spent by June 2024.
2. $125,000 was immediately made available for grant applications

Disaster Response Fund

TRF made other exceptions: <u>Turkey and Syria</u>

1. TRF Designated a temporary Fund for both Turkey and Syria for donations until March 31, 2023.
2. $125,000 was immediately made available for grant applications

The Rotary Foundation

A family of Funds

Service Above Self — **Doing Good in the World**

Rotary — The Rotary Foundation

Multiple funds working toward a common goal

- Annual Fund
- Endowment Fund
- PolioPlus
- World Fund
- Disaster Response Fund

Rotary

World Fund

- Funding source that matches Global Grant DDF (District Designated Funds) contribution 80%
- Supports large international activities over $30,000 in Rotary's 7 Areas of Focus
- Contributions can not be designated for a particular District or Global Grant

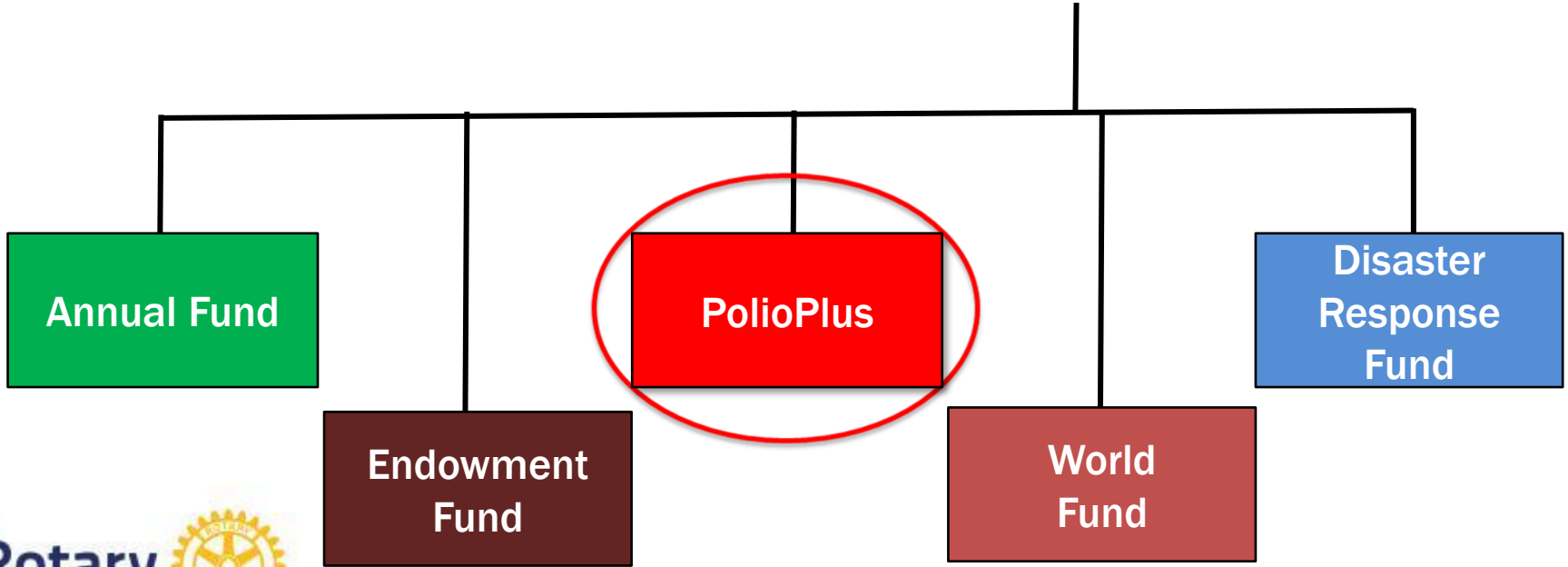
Rotary

The Rotary Foundation

A family of Funds

Service Above Self — **Doing Good in the World**

Rotary — The Rotary Foundation



Rotary

Multiple funds working toward a common goal

PolioPlus : End Polio Now

Polio Cases	2020	2021	2022	2023
Afghanistan	57	4	2	5
Pakistan	84	1	20	1
	141	5	22	6

Rotary

Average cost to fully protect a child against polio

Children vaccinated in up to 40 countries every year

Annual total cost to conduct polio surveillance worldwide

Eradication efforts

Will be ongoing for several years after the last country is Polio Free

Because…..

Circulating Vaccine Derived Polio Cases (VDPV)

Environmental samples continue to be reported

India is Polio Free
The World..... this close!
Rotary
KEEP INDIA POLIO

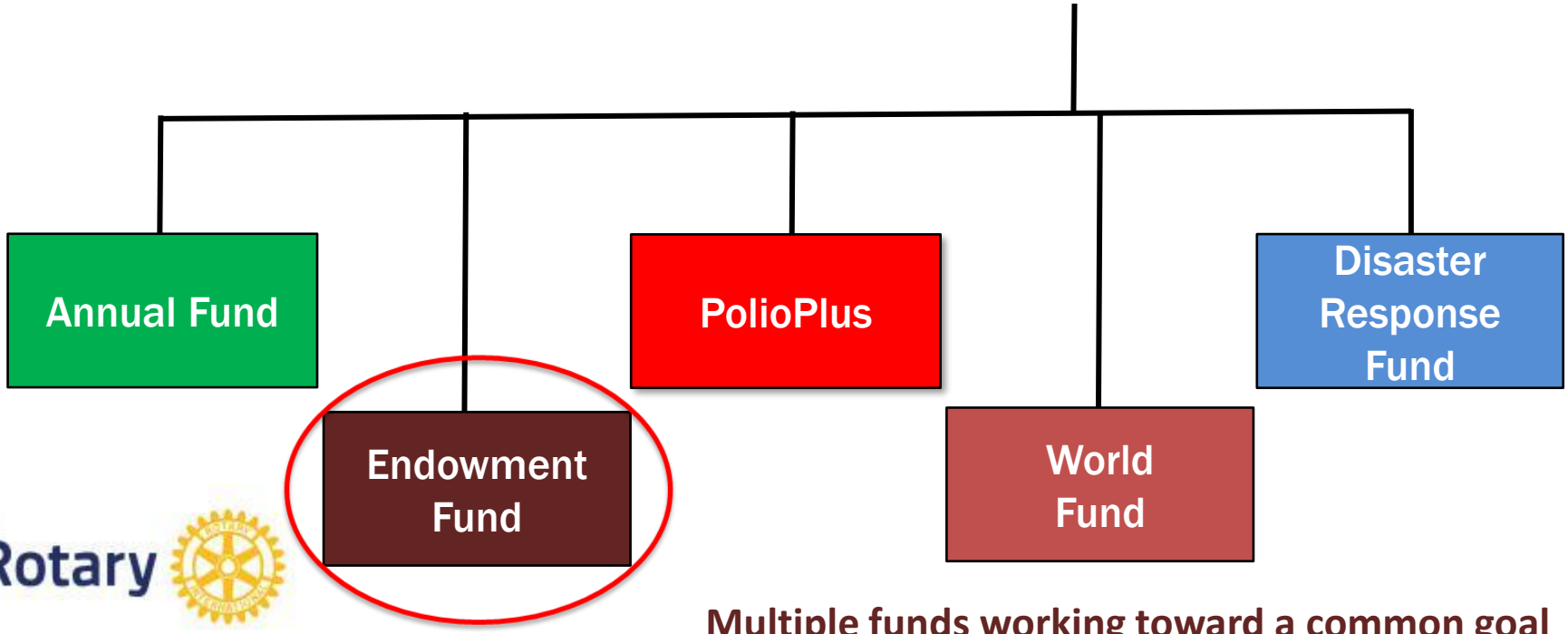
Rotary
KEEP
INDIA
POLIO
FREE

The Rotary Foundation

A family of Funds

Service Above Self — **Doing Good in the World**

Rotary — The Rotary Foundation



Rotary

Multiple funds working toward a common goal

Endowment Fund

- To Secure Tomorrow
- Contributions are professionally invested
- Only the earnings are spent on TRF Programs

- Contributions do not count toward the funding of your district projects. Cash donations count towards 100% Foundation club designation.
- Many gifts are given as Bequests, added to your estate plan
- Goal is $2.025 billion by 2025

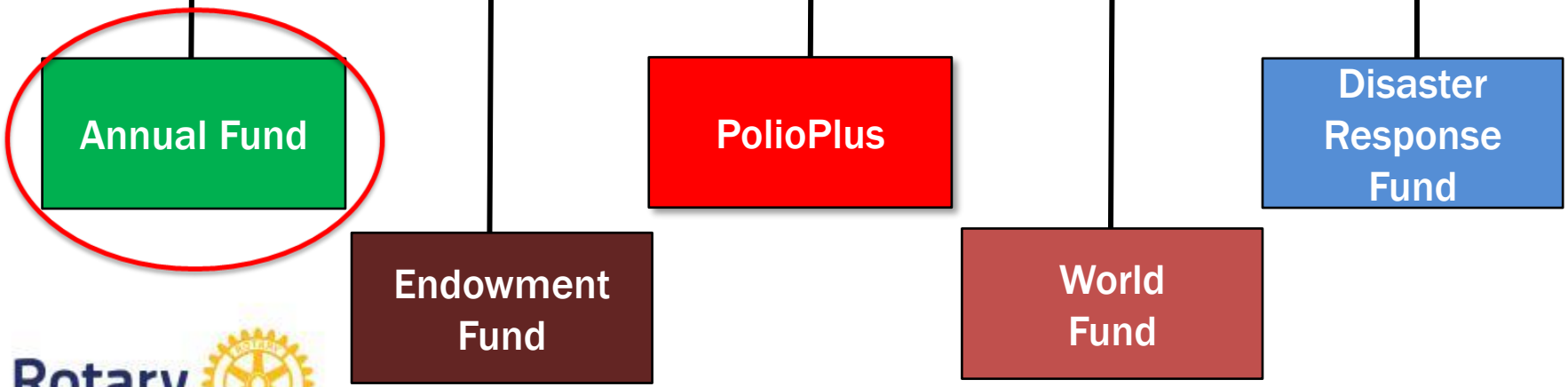
For Certification let's look at the Annual Fund

The Rotary Foundation

A family of Funds

Service Above Self — **Doing Good in the World**

Rotary — The Rotary Foundation



Rotary

Multiple funds working toward a common goal

Annual Fund

- Primary funding source for Foundation grants and activities
- Supports local and international grants through the SHARE system
- Contributions are credited to the Donor, the Donor's club and to each club's *Annual Giving Goal*

Rotary

SHARE System - How We Fund Programs

47.5%
District Designated Fund (DDF)

47.5%
World Fund

District Grants
Global Grants

Polio
Rotary Peace Centers
Global Grants Match

The SHARE System

- SHARE is the mechanism by which Foundation funding is distributed worldwide.
- Districts share in the decision-making process by choosing which programs they wish to support and in which they want to participate.
- Funds from the Annual Fund are available to districts three years after they are contributed.

Annual Fund - SHARE

TRF

$100

3 years

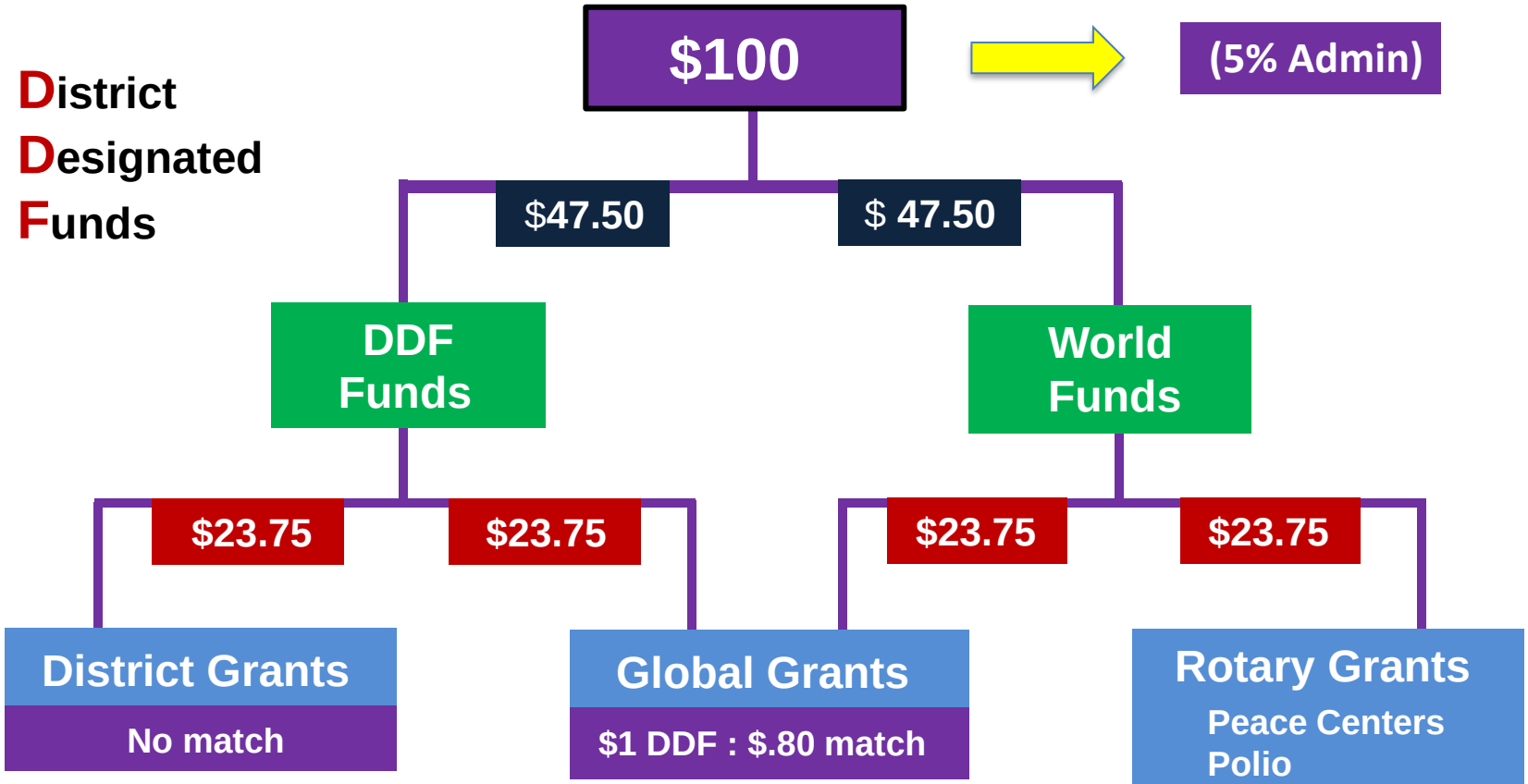
The Rotary Foundation

$100 (less 5% admin.)

Gift of $100 - SHARE

2021

District
Designated
Funds



Rotary

What Counts Toward What?

	Sustaining Member	Every Rotarian, Every Year	Paul Harris Fellow	Major Donor Recognition	Recognition Points	Benefactor	Bequest Society	Club Per Capita	Grant Funds DDF
Annual Fund-SHARE	X	X	X	X	X			X	**X**
Annual Fund-World Fund	X	X	X	X	X			X	
Annual Fund-Area of Focus	X	X	X	X	X			X	
Endowment Fund				X	X	X	X		
Disaster Response Fund	X	X	X	X	X			X	
Other Use Funds*			X	X	X				

*PolioPlus, Peace Center, Global Grants

Annual Fund

A donation to the Annual Fund can be directed to:

- SHARE
- World Fund
- Areas of Focus

Contributions to all 3 funds count towards your PHF.

Only contributions to the Annual Funds – SHARE come back to the District in 3 yrs. to use for our club projects.

Rotary

Basic Education & Literacy

Maternal & Child Health

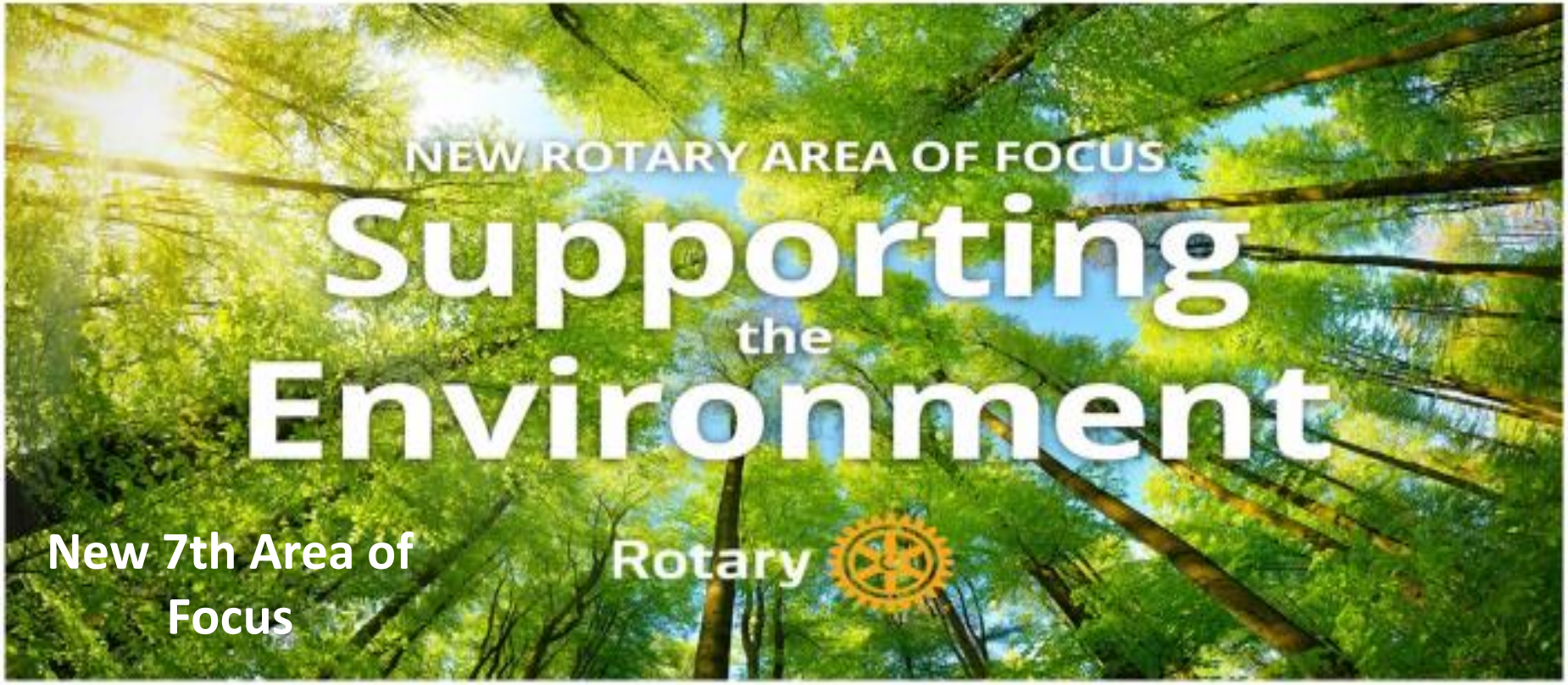
Peace & Conflict Prevention/ Resolution

Disease Prevention & Treatment

Water, Sanitation & Hygiene

Community & Economic Development

Support the Environment



New 7th Area of Focus

2 major types of Rotary Grants Benefit from Gifts to the Annual Fund

District Grants

The District Grants must fall within the Mission of Rotary

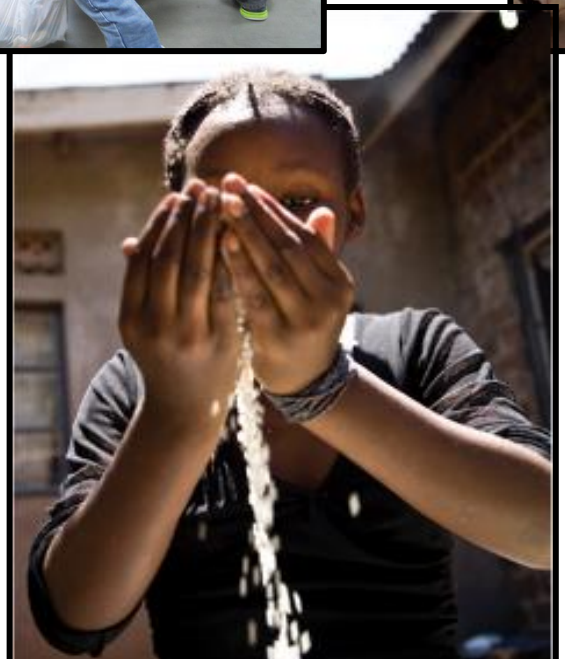
Global Grants

The Global Grants must fall within one or more of Rotary's 7 Areas of Focus

Both types of Grants can be used to fund the following:
View the following slides

1. **Humanitarian Needs**
2. **Scholarships**
3. **Vocational Training Teams**

1. HUMANITARIAN PROJECTS



Rotary

District Grant
Building Project in Cactus, TX

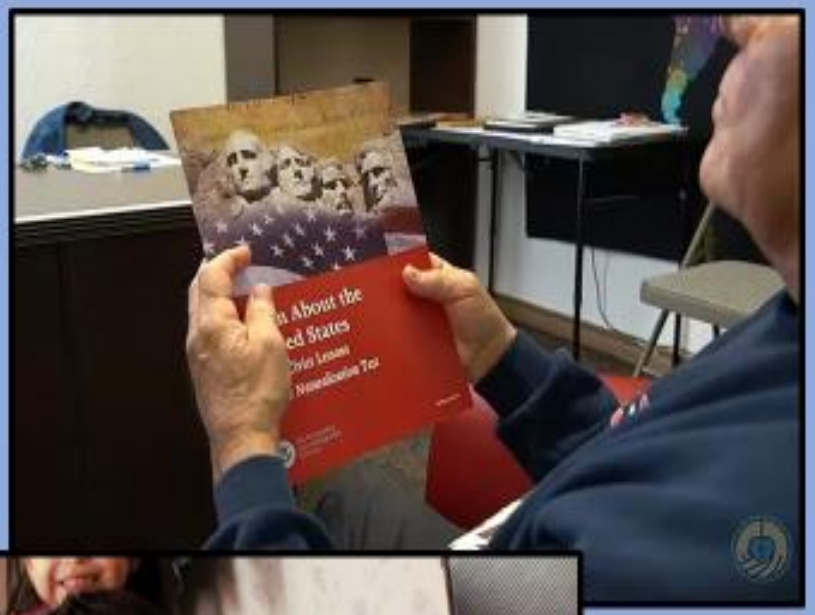
Cactus, TX

5730

Education:
Remodel Classroom
Computer Center
GED Program

Health Center:
Testing Equipment
Office

Cactus, TX



Global Grant - Outdoor Education Center
Harwell Elementary Lubbock, TX

Rotary

2. SCHOLARSHIPS - District

More flexible in terms of:

- Level of study (secondary, university, or graduate studies or certificate programs)
- Location (local or international)
- Length
- Field of study
- Cost

Managed by club/district

Rotary

2. SCHOLARSHIPS - Global

- Graduate level
- Study periods of 1-4 years
- Alignment with the Areas of Focus
  - Previous work, volunteer, and study experience
  - Academic program relate
  - Future career plans (immediate and long-range)
- Host and international sponsors
- $30,000 minimum budget

Rotary

3. VOCATIONAL TRAINING TEAMS

Traveling groups of professionals:

- Learn about their vocation
- Teach professionals about a particular field
- Strengthen knowledge and skills

Rotary

FEATURES OF A DISTRICT GRANT

- A single block grant is requested annually From TRF for club and district projects. Clubs submit funding request to the District, the District submits request to RI
- Local decision making with broader guidelines
- Local or international activities
- Smaller activities and projects
- No Club Match required

Rotary

FEATURES OF A DISTRICT GRANT

- A short term impact
- Each District sets its own procedures on administering applications and method of reporting
- Activities are consistent with the Foundation mission
- Must have active Rotarian participation

Rotary

District Guidelines

D5730 District Guidelines Review

Rotary

District Guidelines - 1

- D5730 Block Grant 2023-24 $33,005
- Club must be qualified
- Application due date August 31, 2023
- You must apply for Grant funds on

  www.rotary5730.org under the Grant tab
- Rotarian involvement
- Club must have entered in RCC your Foundation

  Goals

District Guidelines - 2

- Club must have entered your Foundation Chair with your club officers on www.rotary5730.org
- Club must be current with both your RI and District dues
- Club project must be approved by the District Foundation Committee and TRF
- Club project may begin ONLY after you receive notification from the District to begin
- Cannot use funds for Fundraising or Gift Cards

District Guidelines - 3

- Final grant report must be completed by April 30, 2024 with documents uploaded and 6 questions answered
- Club reimbursement check will be disbursed after the Foundation Committee has approved and closed your grant
- Remember: Your grant amount is based upon your club's Foundation giving 3 years prior

District Website – Grant Documents

Grant Guidelines and MOU – D5730 website
(Overview)

1. Log into : www.rotary5730.org
2. On the left-hand side of the homepage under "Documents" locate:
   - Grant Certification MOU 2023-24
     (Memorandum of Understanding)
   - District Grant Guidelines 2023-24
   - Global Grant Guidelines 2023-24
   - How to Apply for a District Grant

District Website - Guidelines & MOU

1. Log into : www.rotary5730.org

District Website - Guidelines & MOU

2. On the left side of the page go to “Grant Certification & Guidelines 2023-24”:

District Website - Guidelines & MOU

See “Documents” below for Grant information:

Society, contact the PHS District Coordinator PDG César M. Caro by email.

If you are not a Paul Harris Society member then please consider joining today and help make a difference in the world. Be the Inspiration!

To Join the Paul Harris Society click here

Join t… …lioPlus Society

District 5730 Welcome

District Welcome

Grant Certification and Guidelines 2022-2023

At the top of this main page in the Navigation Bar is a dropdown menu, **Foundation**, which includes the following 2022-2023 Grant information to view or download:

- District and Global Guidelines
- District Grant PowerPoint and Questions to answer to be qualified to apply for a District Grant
- Memorandum of Understanding

Documents

2022-2023 Budget

District By-Laws 2020

You must log into the Member Area of the website in order to view the the following documents:

District By-Laws 2020 Approved
July 1, 2020

Home Page News

District Budgets

Posted on Apr 14, 2022

MUST BE LOGGED IN TO VIEW THESE DOCUMENTS

Click Here to View/Download the 2022-2023 District Budget (Adjusted)

Click Here to View/Download the 2021-2022 District Budget

Click Here to View/Download the 2020-2021 District Budget

How To Create A My Rotary

District Website - Grant Instructions

Review: For Instructions on

How to **Apply** and **Close** a Grant

1. Log into : www.rotary5730.org
2. On the homepage, from the Navigation Bar select:
   - "Foundation"
   - Then select "District & Global Grants"
   - Find Grant Module Instructions –

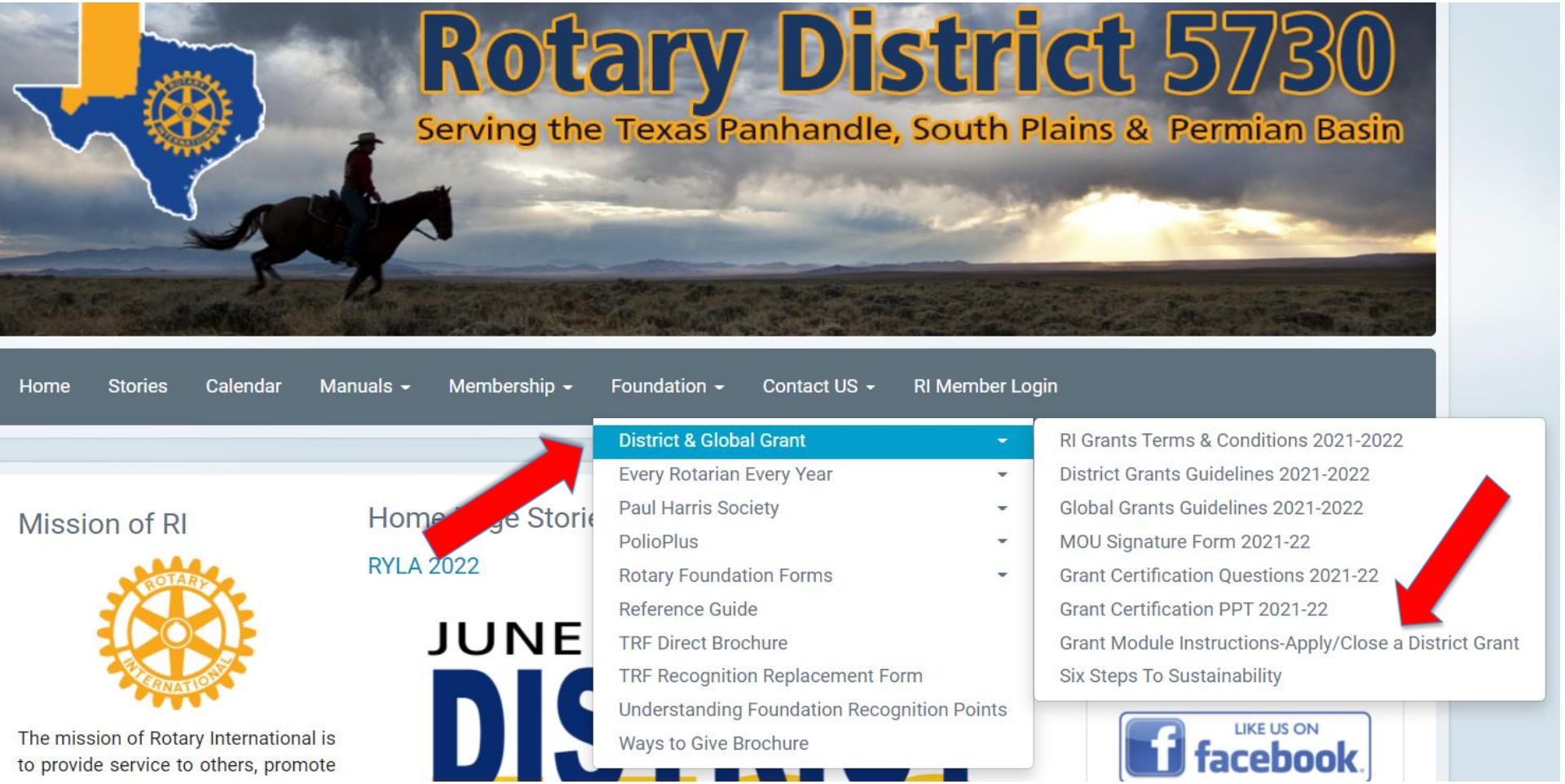
     "**Apply/Close a District Grant"**
3. Also-"District and Global Grant Guidelines" & "MOU"

District Website - Grant Instructions

1. Log into : www.rotary5730.org
2. From the Navigation Bar select: **“Foundation”**

District Website - Grant Instructions

District & Global Grants / Apply/Close a District Grant



District Website - Submit a Grant

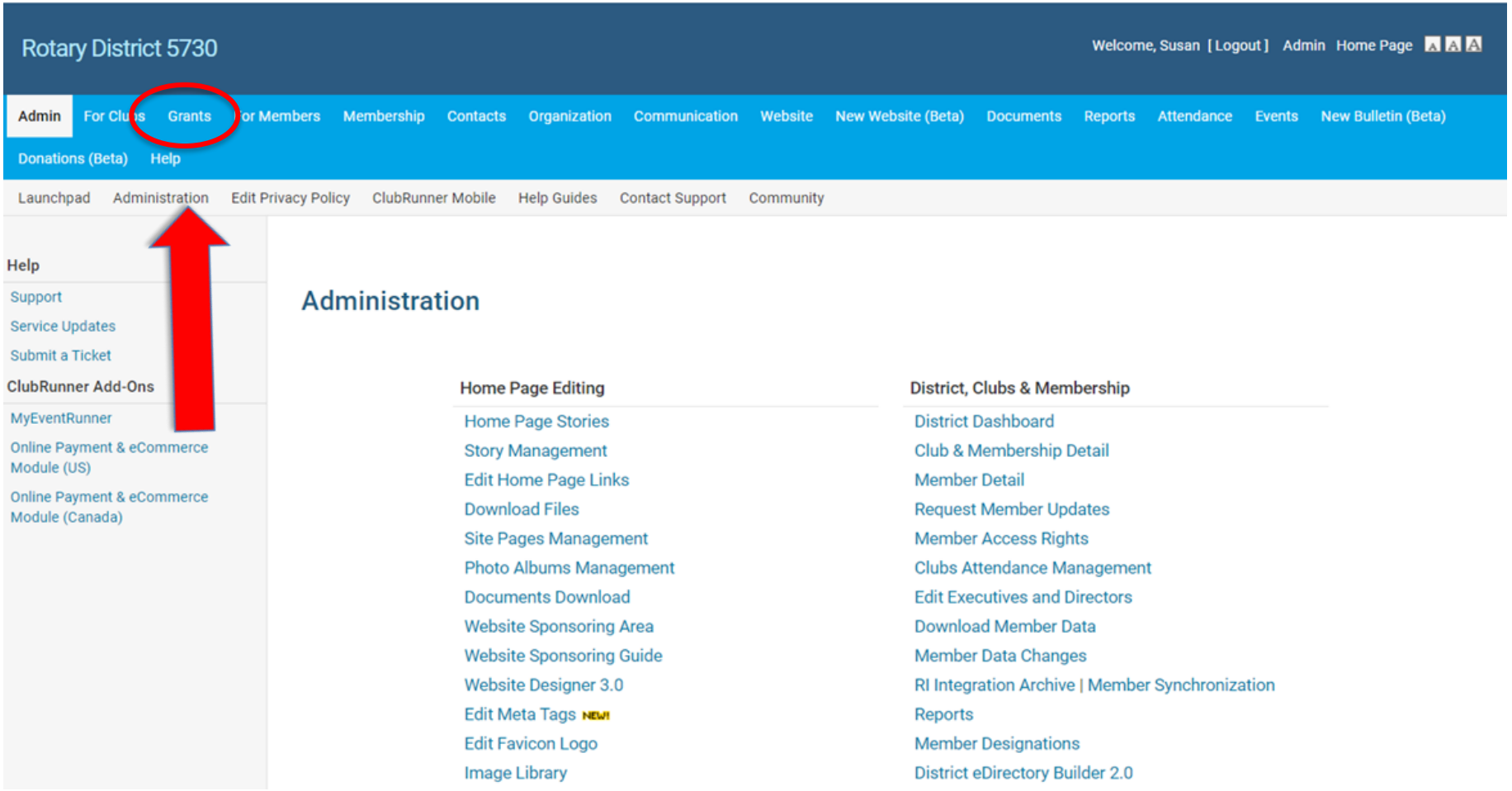
- Long into www.rotary5730.org
- On Homepage: Select “Member Area” (upper right hand corner)
- Select “Grants” on the Navigation Bar
- Select “Submit a Grant Request”
- Fill in Project Name
- Fill in Add Project year: Select year 2023-24
  Note: the Sponsoring Club is your Rotary club
- Note: the Contact name - the club qualified person
- Fill in Description
- Fill in Estimated Budget
- BE SURE TO SELECT “Submit” to save your Grant
- See the next 4 slides for club Grant submission

District Website

Log into : www.rotary5730.org “Member Area”

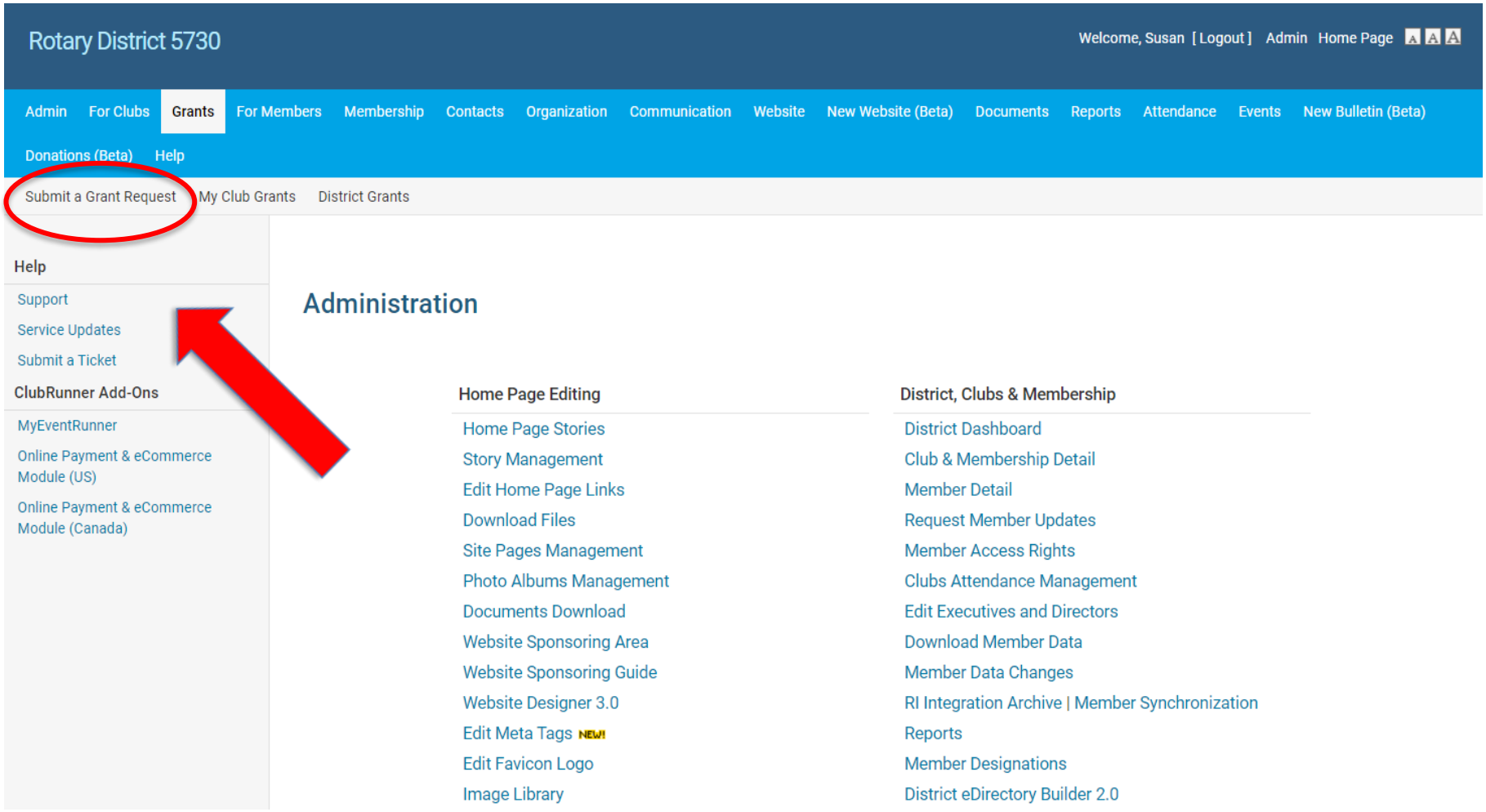
District Website - Submit a Grant

Select "Grants" on the Navigation Bar



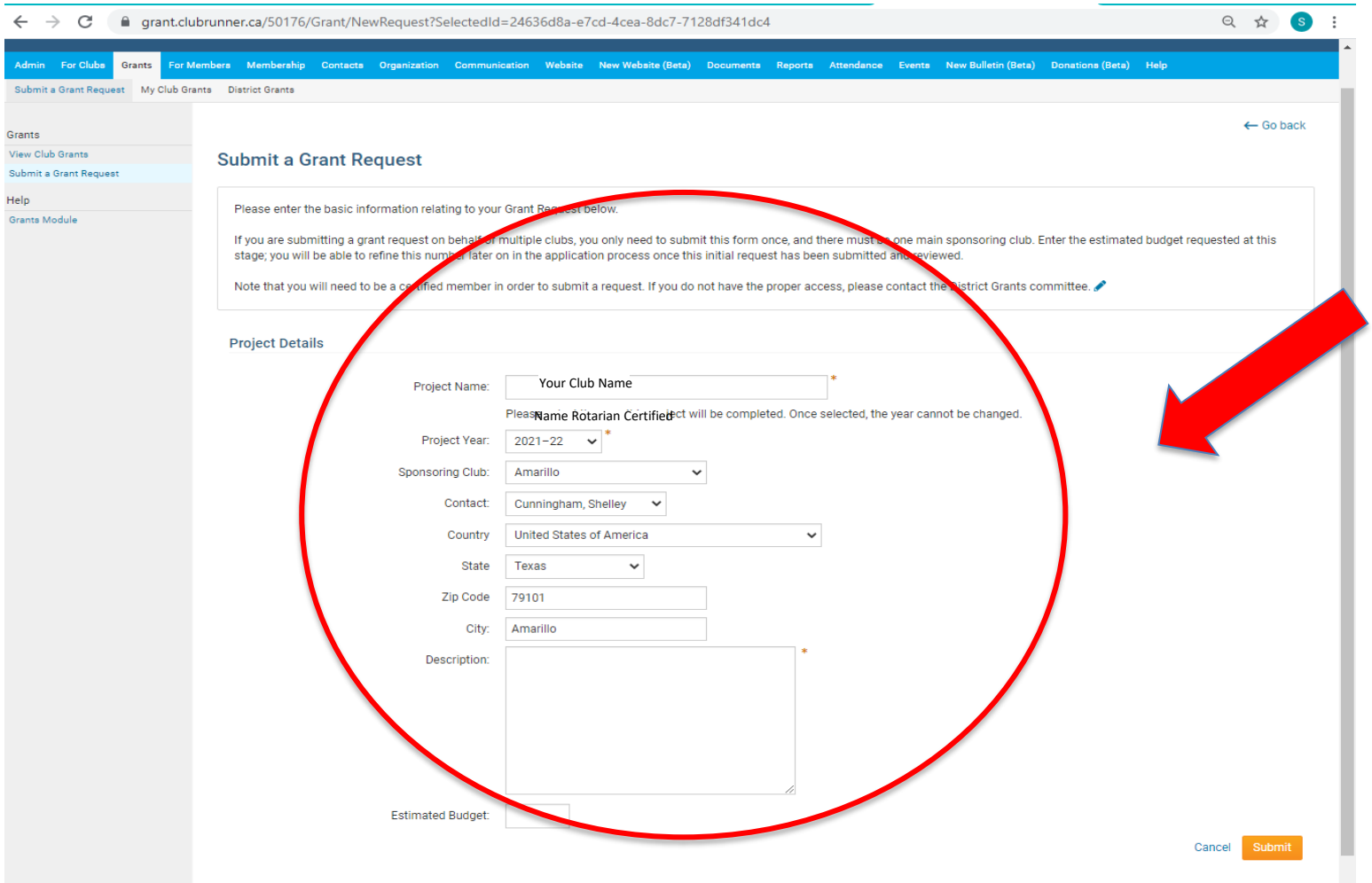
District Website - Submit a Grant

Select "Submit a Grant Request"



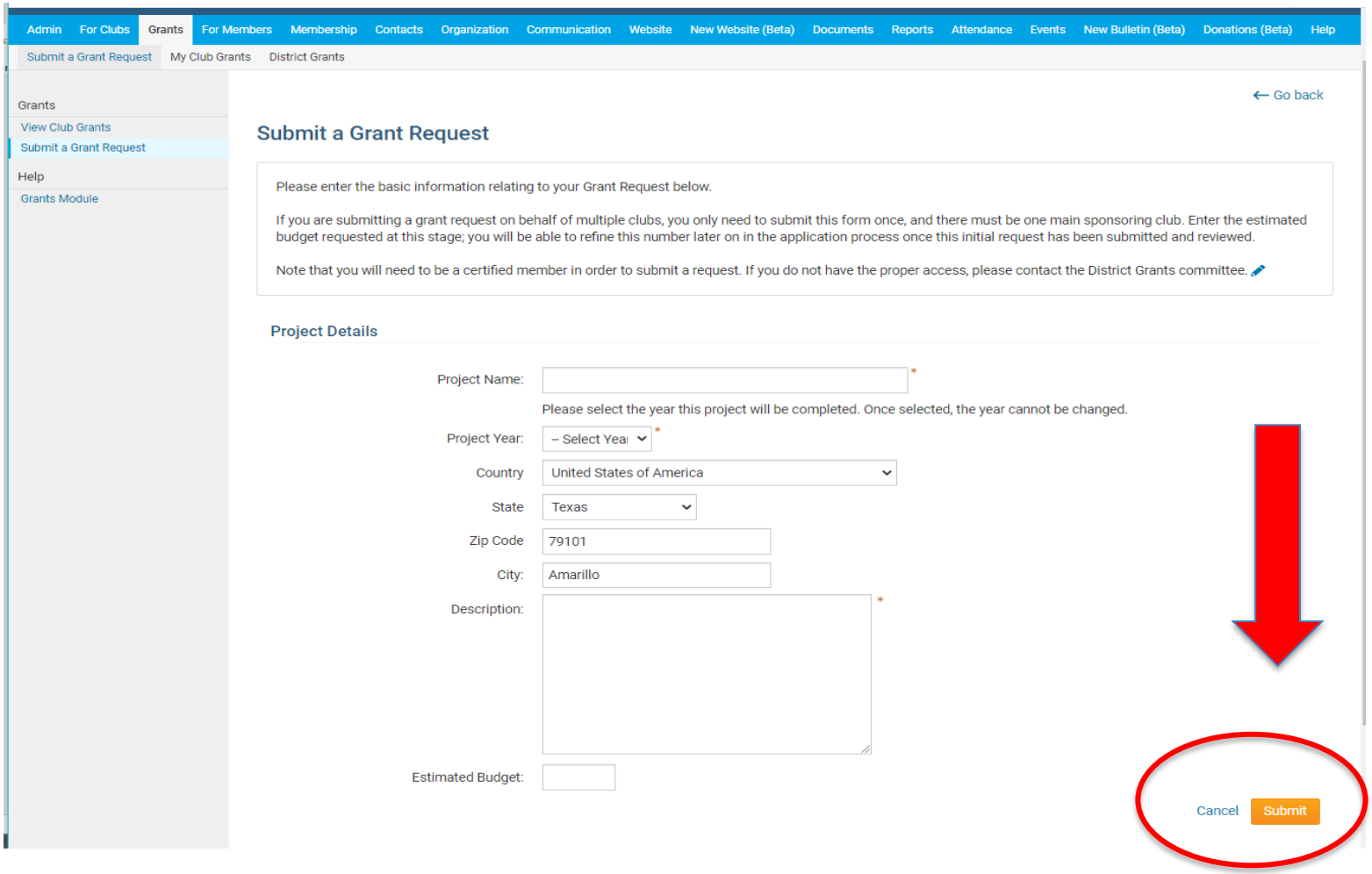
District Website - Submit a Grant

Fill in ALL your project information



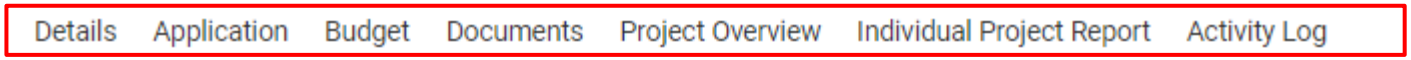
District Website - Submit a Grant

BE SURE TO SELECT "Submit" to save your Grant



District Website - Close a Grant

- Long into www.rotary5730.org
- On Homepage: Select “Member Area” (upper right hand corner)
- Select “Grants” on the Navigation Bar
- Select “My Club Grants”
- Note: Select year 2023-24
- “Open” your Grant
- In the Toolbar in the middle of the page: (refer to the red outlined box)



Select “Documents”, at the bottom of the page, follow the prompts, and “add” your project documents

- Go back to the Toolbar and select “Individual Project Report”, answer the 6 questions, click on the orange “Update” box, then select “Submit” in the orange box.
- Note: If you don’t select “Submit” you will lose your information you just entered, and the Grant will not close!

Examples of District Grants

1. Exchange of mixed professional Vocational Training Teams (VTT)
2. International travel for local doctor to volunteer at a clinic
3. Scholarship for student to attend local or international university
4. Art supplies to assist youth after-school program
5. Dictionary Program with local grade schools
6. $500 Scholarship to a Graduating Senior
7. Boy Scout Building Renovations
8. Bicycle Projects
9. Christmas Dinner with Foster Children
10. Smiles of Kids Program
11. Maintenance at a Foster Child Facility
12. Park Improvements
13. Interact Club Development
14. Food Bank Project
15. Develop Leadership and Community Service Skills
16. Ride with Rotary Bike Project
17. School Landscaping
18. Shoes at Christmas Time
19. Recreation Area Development at Youth Center
20. Backpack Feeding Program
21. Community Thanksgiving Meal
22. Rotary Fun Day at a Track Meet
23. Snack Pack 4 Kids
24. Science Fair Recognition Celebration
25. Purchase participant t-shirts and water for the community Cancer run

Rotary

STEWARDSHIP

Stewardship is the responsible management and oversight of grant funds, which ensures that funds are used properly and benefit populations in need.

Rotary

PROJECT PLANNING

Lifecycle of a Service Project
Webinar series
www.rotary.org/webinars

Plan
Acquire Resources
Implement Project
Evaluate and Promote

FEATURES OF GLOBAL GRANTS (GG)

- Align with an area of focus-7
- Have measurable results
- Respond to a community need
- Include active community and Rotarian participation and partnership
- Strengthen knowledge, skills, resources
- Have long-term benefits
- Have a budget of at least $30,000

Rotary

Global Grants …. New BUZZ words

Accountability : Having an obligation or willingness to accept responsibility and account for the project or plan

Sustainability : Giving a community the skills and knowledge to maintain project outcomes for the long-term to serve the ongoing need after grant funds have been expend.

Returning to the project site years later, one hopes to find

THIS

NOT THIS

BUILDING SUSTAINABLE PROJECTS

- Community participation and needs assessment
- Materials and technology available
- Frequent Rotary partner communication
- Design, Budget and Plan Implementation
- Sustainable/Funding afterwards
- Evaluation
- Apply ONLINE

www.matchinggrants.org/global/

Developed by District 5340
for use by the entire Rotary world

My Account | Search | Contact Us

Main List | Submit Project | Pledge Support | Help | About This Site | District Grants | Non-Pilot Districts

Welcome to the Rotary District Grants Website

Look below for a list of project. Use the search feature to find a specific project.
Click on My Account to login and see your own projects.

Rotary Year
2013-14

List of Projects

#	Title	Country	Location	District	Club	Amount	Status
G-352	OLOG Library Project	Belize	Belmopan	6670	Eaton	$150,000	Need $100,000
G-350	Education Prog in 100 School	India	Mumbai	3140	Borivli	$120,000	Need $70,000
G-348	Mechanical Cows	Ecuador	Guayaquil	4400	Guayaquil Occidente	$100,000	Need $35,000
G-347	Advancing Education Technology	Ecuador	Gualaceo	4400	Gualaceo	$45,000	Need $7,000
G-346	Training needy Indian farmers	India	Mumbai	3140	Deonar	$30,000	Need $20,000
G-345	Computer Literacy -Tribal kids	India	Mumbai	3140	Mumbai Mulund South	$95,000	Need $48,334
G-344	San Jacinto Water Projects	Guatemala	San Jacinto, Guatemala	4250	Chiquimula de la Sierra	$36,000	Need $11,167
G-343	Ethiopia clean water project	Ethiopia	Addis Ababa	9200	Addis Ababa-West	$121,231	Need $30,721
G-341	Surgeries for Children	USA	California	5340	Lemon Grove	$73,000	Need $25,334
G-337	District 5240 Test Project	Honduras	Tegucigalpa	4250	Real de Minas-Tegucigalpa	$30,000	Need $15,334
G-335	Donation Diagnostic Equipment	Turkey	Mersin	2430	Mersin	$98,640	Need $56,427
G-334	Scout training Arboretum Park	Turkey	Adana	2430	Adana-GÃ¼ney	$96,075	Need $42,384
G-333	Mamograhpy mounted on vehicle	Turkey	Adana	2430	Adana	$87,500	Need $36,667
G-332	Community (Blood) Services	Turkey	Adana	2430	Adana-GÃ¼ney	$85,000	Need $37,334
G-331	Community (Blood) Service	Turkey	Adana	2430	Adana-GÃ¼ney	$85,000	Need $37,334
G-329	Hygiene Schools&Students	Turkey	Adana	2430	Adana-Cukurova	$40,100	Fully Pledged
G-326	Capacity Bulding For Vocationa	Uganda	Kanungu District	9200	Kihihi	$52,395	Need $34,930
G-325	Micro Credit for Severely Poor	India	Thiruvaiyaru	2980	Thiruvaiyaru	$58,500	Need $39,000
G-317	Integrated Rural Development	India	Thane Dist. Maharashtra	3140	Bombay North	$80,000	Need $53,334

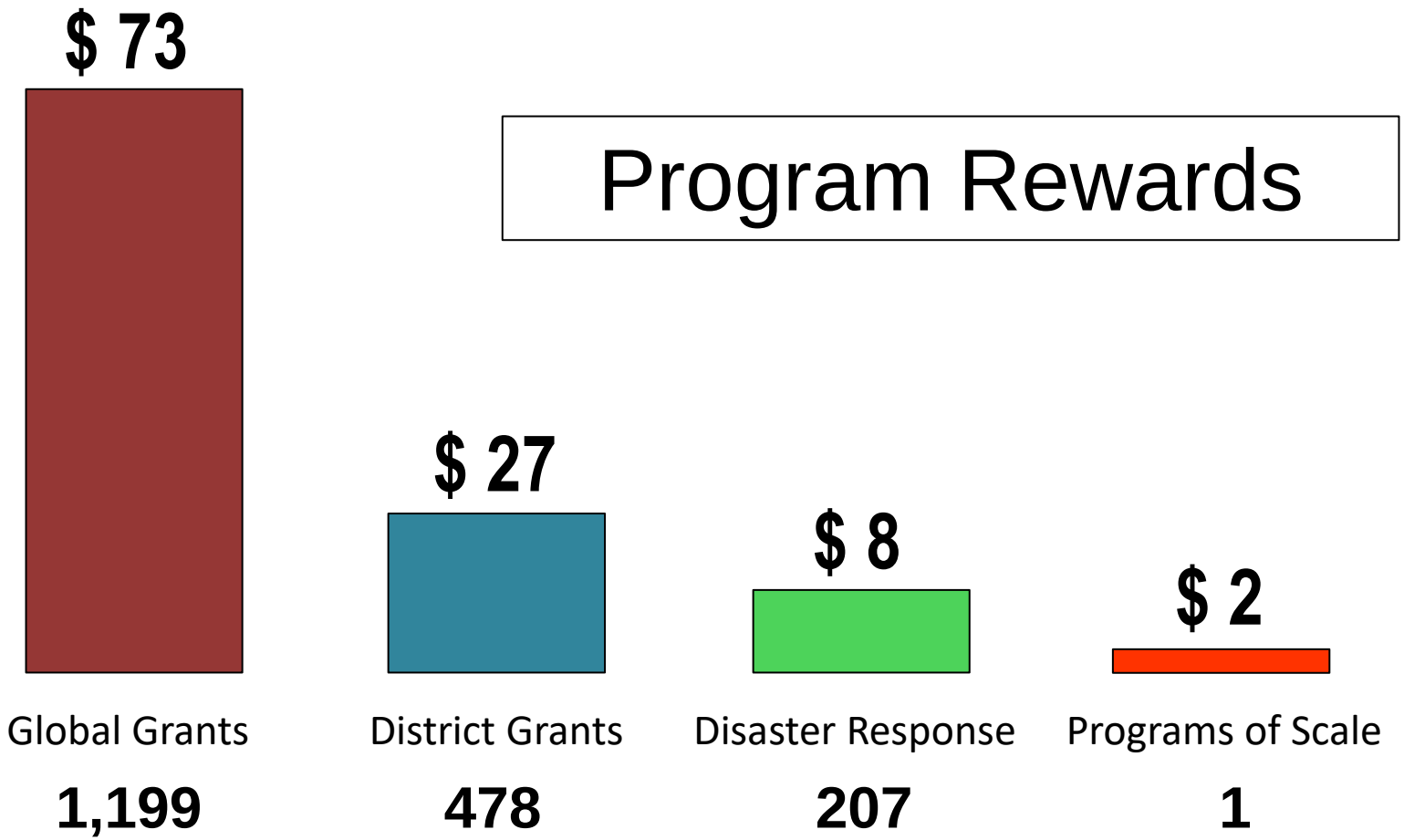
19 projects, $1,483,441 total budget

Main List | Submit Project | Pledge Support | Help | About This Site | District Grants | Non-Pilot Districts

Rotary

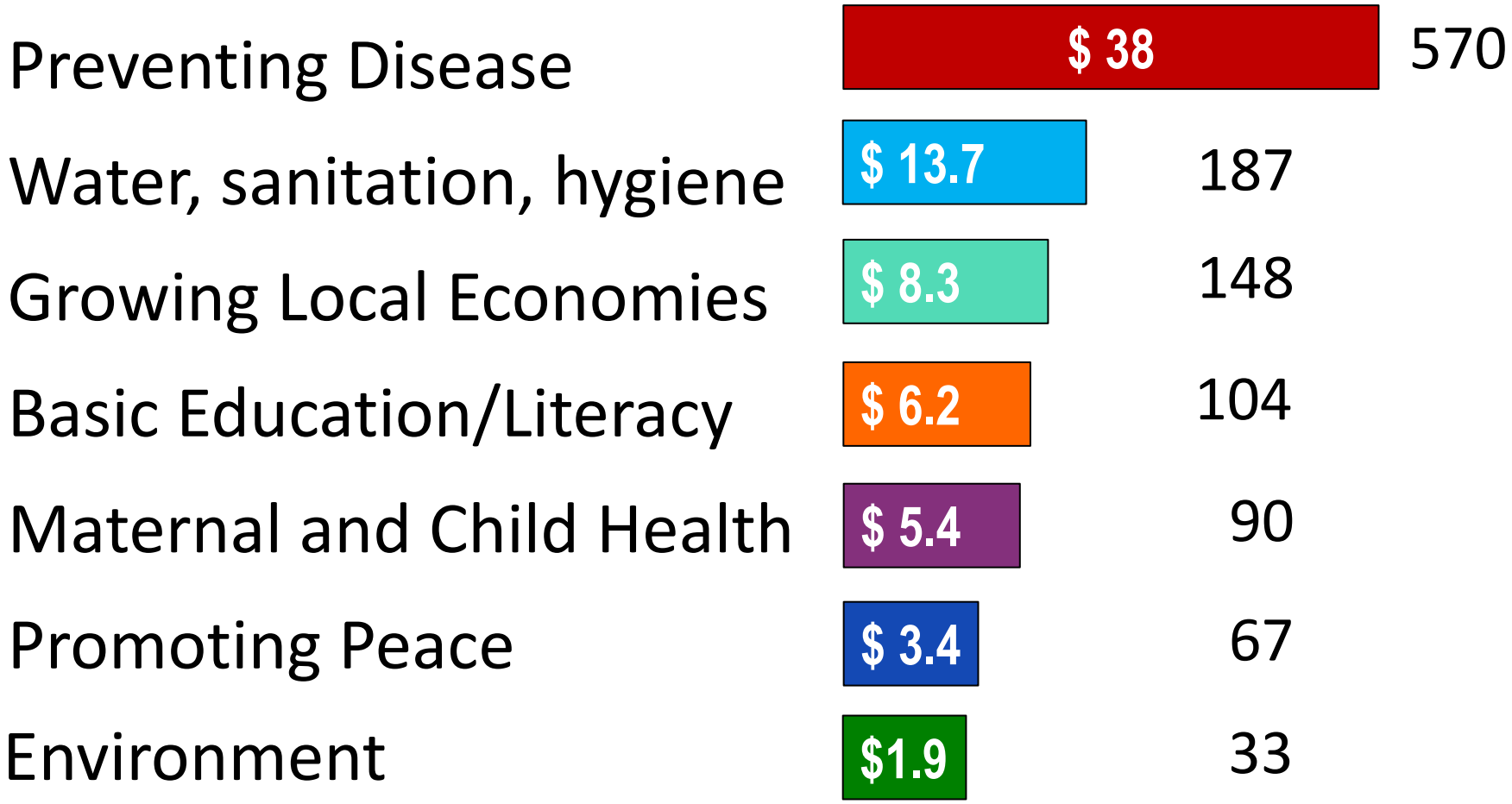
2021-22 Grant Summary

Total $ 110 million



Global Grants Worldwide 2021-22

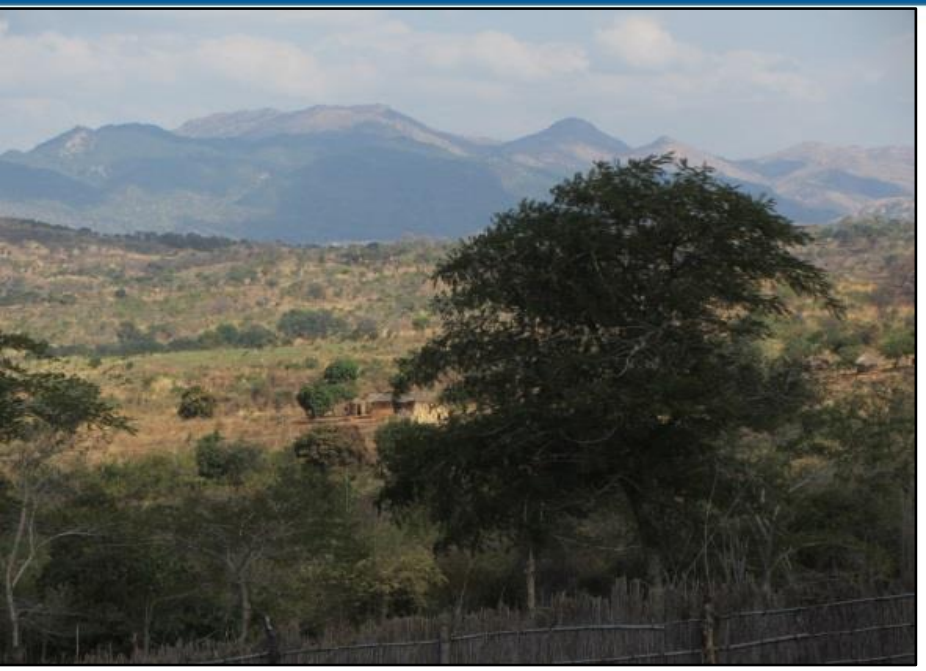
Total $77 million 1,199 grants



GG - National Burn Center - India

- Upgrade the operating theatre at the National Burns Centre, Airoli, India . Partners-Midland, Midland West and D5730
- India's largest, specialized burn hospital in Greater Mumbai area capable of skin grafting facility for burn patients.
- Old equipment was replaced with equipment with latest technology
- Enable complex surgeries for burn victims - Focus on safety of patients and lower morbidity and mortality rates

GG Malawi, Africa

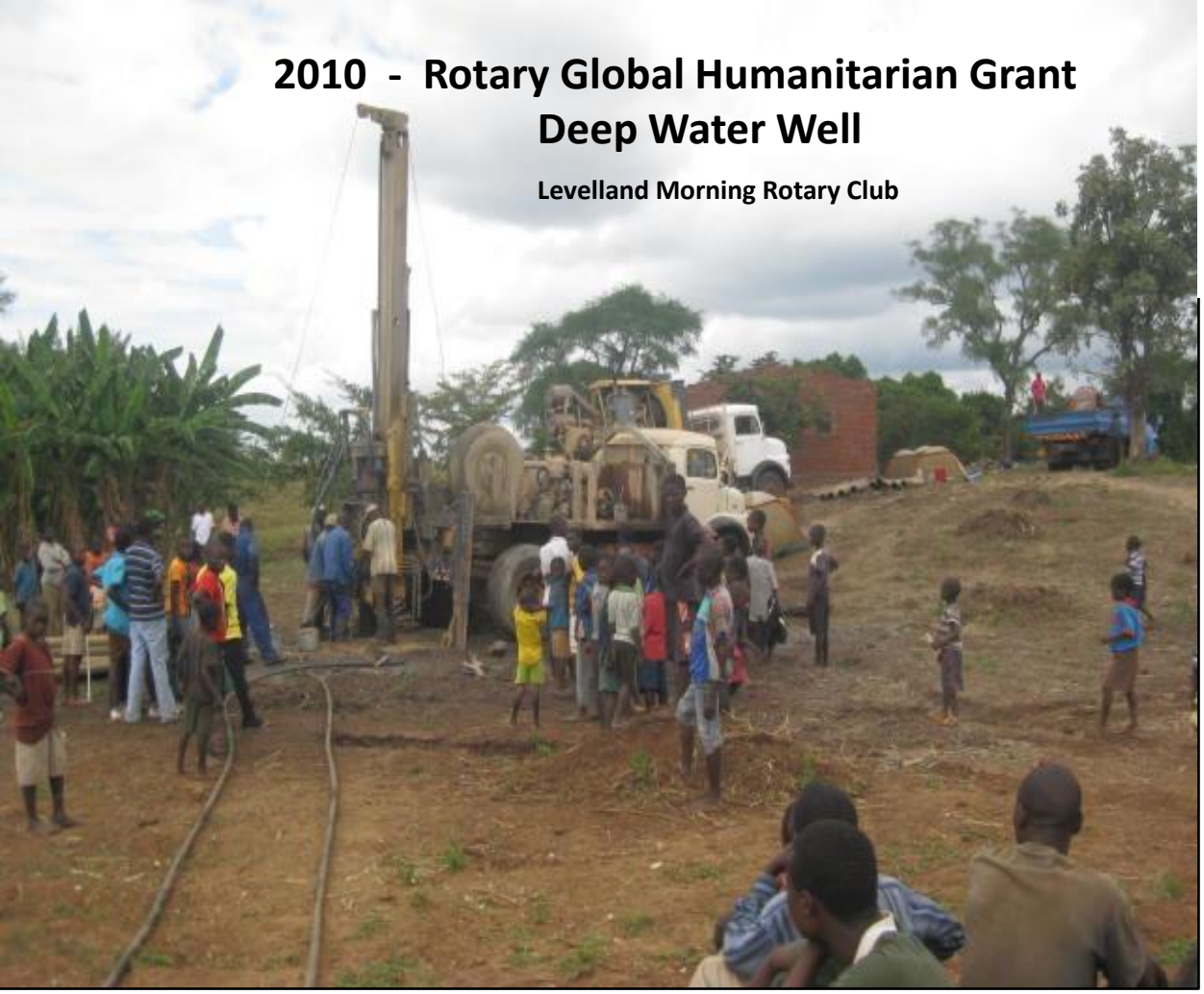


Goat Project

Hoop House Training

2010 - Rotary Global Humanitarian Grant
Deep Water Well

Levelland Morning Rotary Club

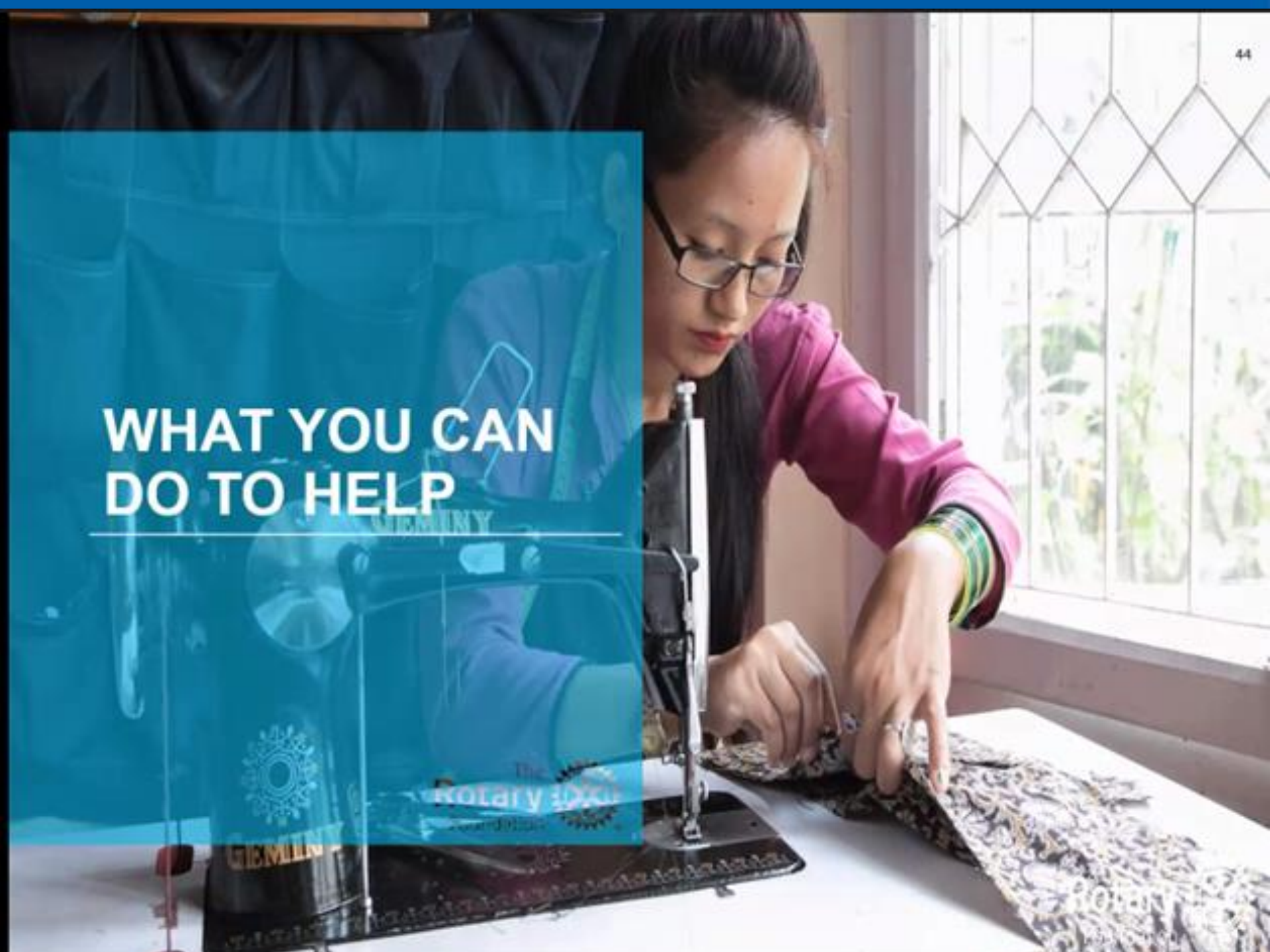


Grace Village
Malawi, Africa

GG - Dominican Republic
Dental partnership with Santiago University

International Project
9 Dental Clinics

Rotary



WHAT YOU CAN DO TO HELP

The Rotary Foundation

Fundraising

SUPPORTING THE ROTARY FOUNDATION

Annual Fund

For Support Today

Endowment Fund

To Secure Tomorrow

PolioPlus Fund

End Polio Now

Rotary

Every Rotarian, Every Year

Every Rotarian, Every Year (EREY)

- Get involved in a Foundation project or program every year
- Contribute $100 or more each year to the Annual Fund – about $2 per week

Rotary

Paul Harris Fellow

- A person who contributes $1,000 to the Annual Fund, Polio Plus, or an approved Global Grant

- Each additional $1,000 cumulative contribution is separately recognized through $9,000 (PHF +8)

Rotary

Paul Harris Society Member

- Contributes $1,000 each year to the Annual Fund, PolioPlus, or approved grants

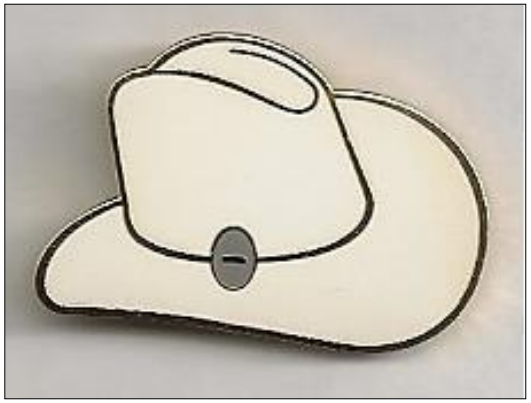
Rotary

Major Donor

- A minimum $10,000 cumulative donation to any Foundation program (no time limit)
- Additional gifts are recognized at $25,000, $50,000, $100,000, $500,000 and $1,000,000

Rotary

White Hat Society



- $5,000 cumulative contribution in one Rotary year
- Entails a commitment to recruit another contributor

Rotary

Arch Klumph Society

A minimum $250,000 cumulative contribution to any Foundation program (no time limit)

- Trustees Circle $250,000+
- Chair's Circle $500,000+
- Foundation Circle $1 million+

Endowment Giving

Rotary Benefactor:

$1,000 pledge or contribution to the Endowment Fund

Bequest Society:

A minimum of $10,000 pledge, e.g. Estate Plan or Insurance Policy, or contribution to the Endowment Fund.

Rotary

Recognition for Clubs

100% Foundation Giving

100% Every Rotarian Every Year

100% Paul Harris Fellow

Highest Per Capita Giving

Rotary

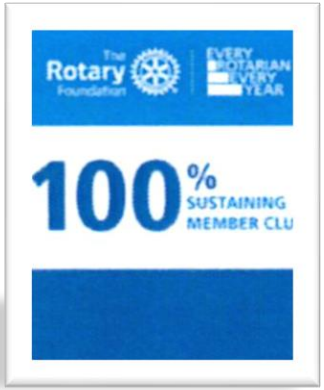
Club Recognition

100% Foundation Giving Club

- Every dues paying member personally contributes $25 or more to TRF
- $100 per capita

Annual Fund-SHARE
Approved GG

PolioPlus
Endowment



100% Every Rotarian, Every Year

- Every dues paying member personally contributes $25 or more to the Annual Fund
- $100 per capita

100% Paul Harris Fellow Club

- 100% Members Give to any TRF Fund except Endowment during a Rotary year
- $1,000+ Minimum
- One-time club recognition

MAKE ROTARY YOUR CHARITY OF CHOICE!

Needs identified and implemented by Rotarians

- Local and international activities
- Diligent oversight of funds
- Global network of compassionate volunteers
- Rotarian driven

Rotary

The Rotary Foundation

Why We Give

Number 5

The Cool Bling…

Number 4

It's **My** Foundation

It's **Your** Foundation

It's **Our** Foundation

Number 3

Humanitarian Service

Number 2

And the Number One Reason We Give to The Rotary Foundation….

Number 1

Because we can make service projects happen…

Polio, Peace, Health, Education, Environment

Rotarians

The Rotary Foundation

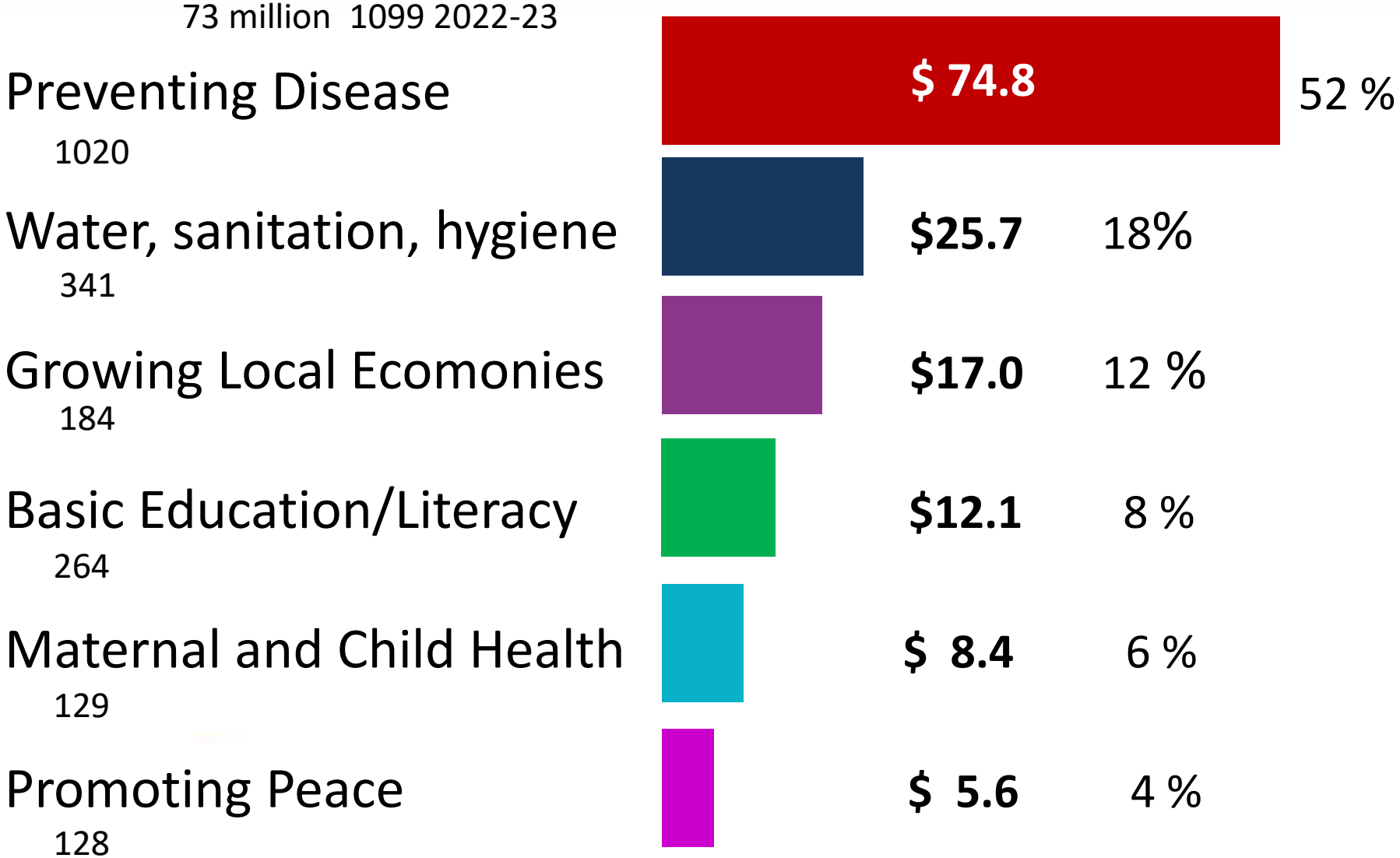
YOU

Make a difference!

THE ROTARY FOUNDATION
DOING GOOD IN THE WORLD
Rotary

Rotary

Global Grants Worldwide - 2021-22

Total $143.6 million **2066 grants**

73 million 1099 2022-23