

Guide to Donations and Bequest Options to The Rotary Foundation

Rotary District 5000

The Rotary Foundation



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Set Up Recurring Donations on rotary.org

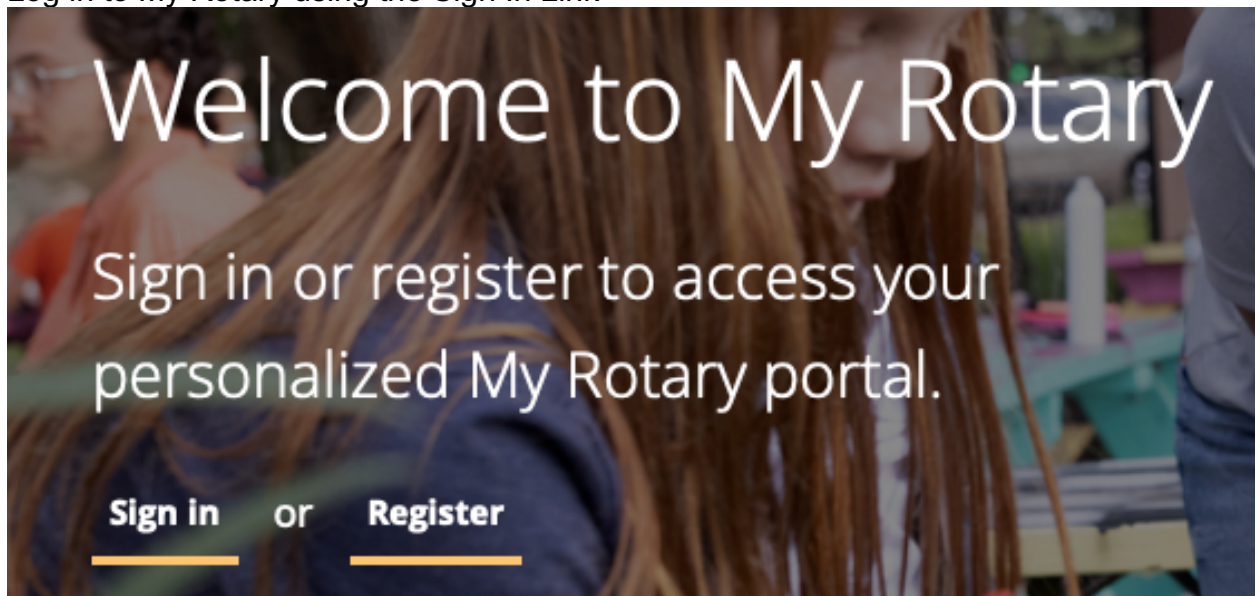
1. Access rotary.org
2. In the upper right corner, click on My Rotary

[MY ROTARY](#) | [CLUB FINDER](#) | [SEARCH](#)

[JOIN](#)

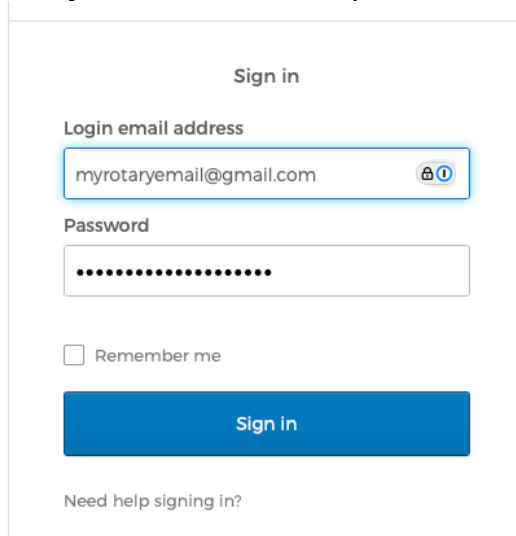
[DONATE](#)

3. Log in to My Rotary using the Sign In Link



Alternatively, you can Register for My Rotary if you do not already have an established access account

4. Enter your username and password, then click Sign In



The screenshot shows a 'Sign in' form with the following elements:

- Title: Sign in
- Label: Login email address
- Input field: myrotaryemail@gmail.com (with a lock icon and a help icon)
- Label: Password
- Input field: A series of dots representing a masked password.
- Checkbox: Remember me (unchecked)
- Button: Sign in (blue)
- Text: Need help signing in?

5. Click on Participate in the top menu, then Rotary Direct under the Support our Foundation heading



The screenshot shows the Rotary website's top navigation and main content area:

- Top navigation: Rotary logo, My Rotary, Donate button, Refer button, Search icon.
- Secondary navigation: My Rotary (dropdown), Participate (dropdown), Events & Connections (dropdown), Knowledge & Resources (dropdown), Who We Are (dropdown).
- Main content area with four columns:
 - Programs**: Rotary Action Groups, Rotary Fellowships, Rotary Community Corps, Rotary Friendship Exchanges, Interact, Rotary Youth Leadership Awards, Rotary Youth Exchange.
 - Grants**: Grant Center, District Grants, Global Grants, Programs of Scale, Disaster Response Grants.
 - Projects**: Developing Projects, The Cadre, Rotary Showcase.
 - Start a Club**: (Section header)
 - Support Our Foundation**: Annual Fund, End Polio, Raise for Rotary, Rotary Direct, Ways to Give, Endowment Fund, Rotary Peace Centers.
- Right sidebar: Image of two men, **Disaster Response Grants** heading, and text: 'Find out how to apply for disaster response grants.'

6. A screen displays with a Rotary Direct header

Rotary Direct

Enroll in Rotary's recurring giving program, Rotary Direct, which makes giving easy, fast, and secure. You can schedule a monthly, quarterly, or annual donation that empowers Rotarians to change lives in communities around the world.

7. Choose how you want your funds to be managed. There are two options: Featured Causes or Areas of Focus

Featured Causes

Choose what you would like to support

Featured Causes Areas of Focus

Contributions to these featured causes are eligible for Paul Harris Fellow recognition.

Annual Fund-SHARE
Learn more

PolioPlus Fund
Learn more

World Fund
Learn more

Disaster Response Fund
Learn more

All contributions made to Featured Causes are eligible for Paul Harris Fellowship recognition.

If you select the default option of Annual Fund – SHARE under Featured Causes, your funds are directed to the Annual Fund. Annual Fund – SHARE contributions are divided equally between World Fund and District Designated Funds (DDF) at the end of every Rotary year. Donations made to Annual Fund – SHARE are invested for three years, then returned to the District from which they originated, minus a 5% operating expense fee. These donations are also

If you select the PolioPlus Fund, your donation helps Rotary reach every child with the polio vaccine. Our partnership with the Bill & Melinda Gates Foundation triples your donation amount.

If you select World Fund, your gift will be spent where the need is greatest, as determined by the Trustees of The Rotary Foundation.








If you select Disaster Response Fund, your contributions are made available to Clubs and Districts through Rotary Disaster Response Grants. You cannot direct your funds to a specific disaster.

Areas of Focus

Choose what you would like to support

[Featured Causes](#) [Areas of Focus](#)

You can direct your gift to an area of focus within the Annual Fund. However, Annual Fund gifts that are designated to an area of focus do not generate District Designated Funds (DDF).

 The Environment Learn more	 Peacebuilding and Conflict Prevention Learn more
 Disease Prevention and Treatment Learn more	 Water, Sanitation, and Hygiene Learn more
 Maternal and Child Health Learn more	 Basic Education and Literacy Learn more
 Community Economic Development Learn more	

All contributions to Areas of Focus are eligible for Paul Harris Fellowship recognition. However, they are not part of the SHARE program, so Rotary maintains these donations in perpetuity. Each Area of Focus option provisions Rotary projects identified as supporting a specific focus.

- Next, define your Enrollment Details

Enrollment details

Select your country

Select your currency

If you would like to update your existing recurring donation, please [edit in My Donations](#).

Choose frequency

Select an amount

USD <input type="radio"/> 25	USD <input type="radio"/> 100	USD <input checked="" type="radio"/> 250	USD <input type="radio"/> 1000	USD <input type="radio"/> Other
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Assuming you are donating from within the US and your desired currency is US Dollar, you can leave the first two options set to the default. Frequency options are Monthly, Quarterly, and Annually.

Monthly shows amounts of \$10, \$50, \$100 (default), \$200.

Quarterly shows amounts of \$25, \$00, \$250 (default), \$500.

Annually shows amounts of \$100, \$500, \$1,000 (default), \$1,500.

An option must be selected to continue. If you choose Quarterly or Annually, you can determine what month your contributions begin.

If you want an amount that is not listed, you must select Other. If you choose Other, you are prompted for your donation amount.

8. Now, verify your Personal Information

Personal information

Kealoha

Makana

808-555-1212

myrotaryemail@gmail.com

You cannot change the donor receiving recognition by changing the name above.
You must log in as that donor.

9. Verify or update your Billing Address

Billing address

1234 Fellowship Way

Address Line 2 (optional)

Address Line 3 (optional)

Rotary

HI




99999

United States


10. Complete your Payment Details.


Payment Details

Credit Card



Expiration date

CVV 

 Note on paying by credit card

All information exchanged for payment is SSL encrypted. Third parties cannot detect, intercept, or use this data. It is not stored on Rotary's computer systems.

11. Last, click the SUBMIT button at the bottom of the screen.

REVIEW MY ENROLLMENT

SUBMIT

Your donations recur regularly and show up on your credit card billing statement. You will also receive an email from giftacknowledgement@rotary.org as a report of your donation.

Donating at least \$1,000 annually to The Rotary Foundation makes you eligible to become a Paul Harris Society member. This is separate from Paul Harris Fellowship levels. The Paul Harris Society represents a commitment to donate at least \$1,000 annually to the Foundation. You must notify Rotary International of your intent by completing and submitting the form at <https://www.rotary.org/en/about-rotary/history/paul-harris-society>.

Make a One Time Donation to The Rotary Foundation

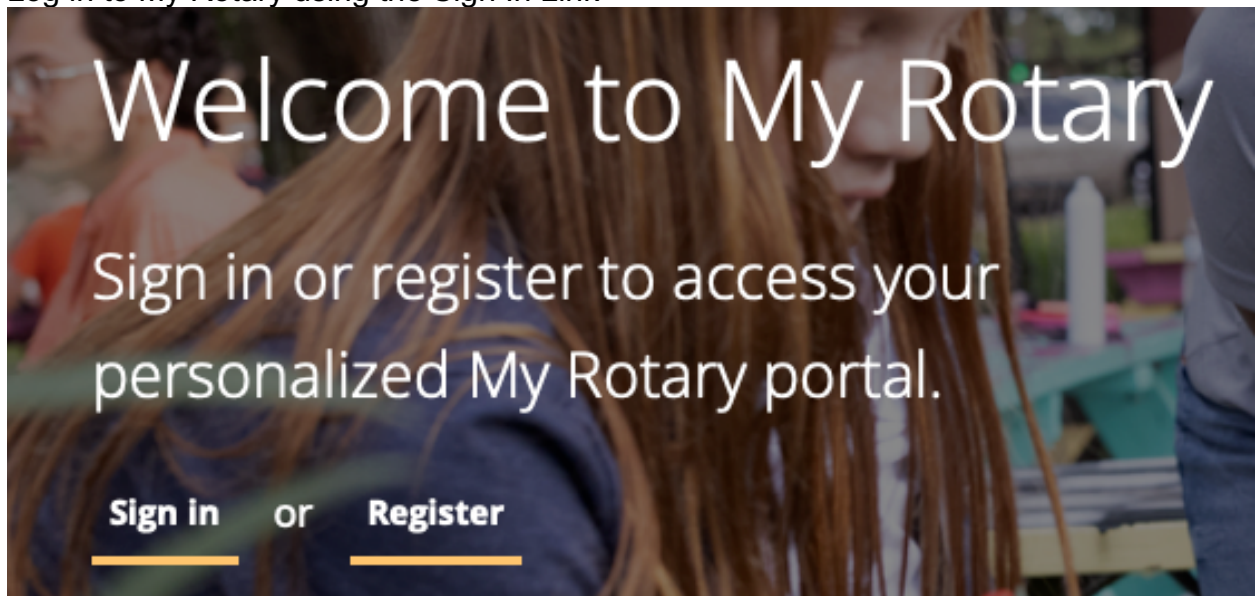
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[MY ROTARY](#) | [CLUB FINDER](#) | [SEARCH](#)

JOIN

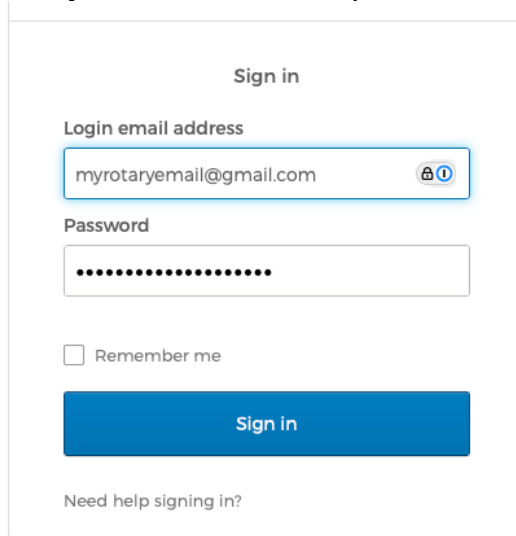
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- Button: Sign in (blue)
- Text: Need help signing in?

5. Click on Participate in the top menu, then Annual Fund under the Support our Foundation heading



The screenshot shows the Rotary website header and main content area:

- Header: Rotary logo, My Rotary, Donate button, Refer button, Search icon.
- Navigation: My Rotary (dropdown), Participate (dropdown), Events & Connections (dropdown), Knowledge & Resources (dropdown), Who We Are (dropdown).
- Main Content Area:
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 - Grants**: Grant Center, District Grants, Global Grants, Programs of Scale, Disaster Response Grants.
 - Projects**: Developing Projects, The Cadre, Rotary Showcase.
 - Start a Club**: (Section header)
 - Support Our Foundation**: Annual Fund, End Polio, Raise for Rotary, Rotary Direct, Ways to Give, Endowment Fund, Rotary Peace Centers.
 - Disaster Response Grants**: (Section header) Find out how to apply for disaster response grants. (Accompanied by an image of two men in a field).

6. Scroll down on the page until Ways to Support our Annual Fund is shown

Ways to support our Annual Fund

Give your annual gift

You can direct your Annual Fund contributions to SHARE, the World Fund, or one of Rotary's areas of focus. All of these contributions will be spent on sustainable, life-changing Rotary projects.



7. Click the Donate button

8. Choose how you want your funds to be managed. There are five options: Featured Causes, Areas of Focus, Global Grants, Named Funds, and Endowment

Featured Causes

Choose what you would like to support

The screenshot displays a user interface for selecting a featured cause. At the top, there are two tabs: 'Featured Causes' (which is active and underlined) and 'Areas of Focus'. Below the tabs, a text block states: 'Contributions to these featured causes are eligible for Paul Harris Fellow recognition.' There are four cards arranged in a 2x2 grid. The top-left card is blue with a white checkmark icon and is titled 'Annual Fund-SHARE'. The top-right card is white with a grey circle icon and is titled 'PolioPlus Fund'. The bottom-left card is white with a grey circle icon and is titled 'World Fund'. The bottom-right card is white with a grey circle icon and is titled 'Disaster Response Fund'. Each card has a 'Learn more' link at the bottom.

All contributions made to Featured Causes are eligible for Paul Harris Fellowship recognition.

If you select the default option of Annual Fund – SHARE under Featured Causes, your funds are directed to the Annual Fund. Annual Fund – SHARE contributions are divided equally between World Fund and District Designated Funds (DDF) at the end of every Rotary year. Donations made to Annual Fund – SHARE are invested for three years, then returned to the District from which they originated, minus a 5% operating expense fee. These donations are also eligible for Paul Harris Fellowship and Paul Harris Society membership.

If you select the PolioPlus Fund, your donation helps Rotary reach every child with the polio vaccine. Our partnership with the Bill & Melinda Gates Foundation triples your donation amount.

If you select World Fund, your gift will be spent where the need is greatest, as determined by the Trustees of The Rotary Foundation.








If you select Disaster Response Fund, your contributions are made available to Clubs and Districts through Rotary Disaster Response Grants. You cannot direct your funds to a specific disaster.

Areas of Focus

Choose what you would like to support

[Featured Causes](#) [Areas of Focus](#)

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 The Environment Learn more	 Peacebuilding and Conflict Prevention Learn more
 Disease Prevention and Treatment Learn more	 Water, Sanitation, and Hygiene Learn more
 Maternal and Child Health Learn more	 Basic Education and Literacy Learn more
 Community Economic Development Learn more	

All contributions to Areas of Focus are eligible for Paul Harris Fellowship recognition. However, they are not part of the SHARE program, so Rotary maintains these donations in perpetuity.

Each Area of Focus option provisions Rotary projects identified as supporting a specific focus.

Global Grants

Contributing to a Global Grant supports significant international activities with sustainable and measurable outcomes. You must provide the seven-digit Grant ID number, available from the Grant administrator

Choose what you would like to support

< Causes Areas of Focus **Global Grants** Named Funds Endowr >

Global grants support large international activities that have sustainable and measurable outcomes.

Seven-digit grant number

SEARCH

Named Funds

A contribution to an existing Named Fund increases its ongoing impact. You must provide the six-digit gift ID, which is available from gift.administration@rotary.org.

Choose what you would like to support

< : Areas of Focus Global Grants **Named Funds** Endowment >

To donate to an existing fund, please enter the six digit gift ID. If you do not know the gift ID, please contact gift.administration@rotary.org or your local office.

Enter gift ID

SEARCH

Endowment

A gift to the Endowment is preserved by investing the original contribution and spending only a portion of the earnings

Choose what you would like to support

< : [Areas of Focus](#) [Global Grants](#) [Named Funds](#) [Endowment](#) >

Rotary strives to increase the value of your gift to the Endowment by preserving and investing your initial contribution and spending only a portion of the earnings.

Endowment-SHARE
Learn more

Endowment-Rotary Peace Centers
Learn more

Endowment-World Fund
Learn more

Endowment – SHARE

Earnings are split equally between the World Fund and District Designated Funds

Endowment – Rotary Peace Centers

Earnings support academic training, networking, and programs that develop leaders in peace and conflict resolution

Endowment – World Fund

Earnings are spent where the need is greatest, as determined by the Trustees of The Rotary Foundation

9. Determine if you would like to donate in honor or memory of someone

I would like to make this donation in honor or in memory of someone

If you select this option, you must determine whether the donation is in memory of someone deceased or in honor of someone living. In either case, you can also choose how the donation notification is handled and the design of the notification.

10. Next, determine your donation amount

Donation

Select your country

United States

Select your currency

US Dollar

Select a donation type

One-time donation

Recurring donation

Select an amount

USD 25

USD 100

USD 250

USD 1000

USD Other

Assuming you are donating from within the US and your desired currency is US Dollar, you can leave the first two options set to the default. Note the donation type should use the default value of One-time Donation.

Last, you must Select an Amount. Note that the default option is 250.

You must select that option if you want any other amount, including one not listed. If you choose Other, you will be prompted to provide your donation amount.

11. Now, verify your Personal Information

Personal information

Kealoha

Makana

808-555-1212

myrotaryemail@gmail.com

You cannot change the donor receiving recognition by changing the name above. You must log in as that donor.

12. Verify or update your Billing Address

Billing address

1234 Fellowship Way

Address Line 2 (optional)

Address Line 3 (optional)

Rotary

HI


99999

United States


13. Complete your Payment Details.


Payment Details

Credit Card



Expiration date

CVV 

 Note on paying by credit card

All information exchanged for payment is SSL encrypted. Third parties cannot detect, intercept, or use this data. It is not stored on Rotary's computer systems.

14. Last, click the SUBMIT button at the bottom of the screen.

REVIEW MY ENROLLMENT

SUBMIT

You will receive an email from giftacknowledgement@rotary.org as a report of your donation.

Individual Donor Recognition

Paul Harris Fellow - \$1,000 in cumulative giving to The Rotary Foundation

Paul Harris +1 Fellow – \$2,000 to \$2,999 in cumulative giving to The Rotary Foundation

Paul Harris +2 Fellow – \$3,000 to \$3,999 in cumulative giving to The Rotary Foundation

Paul Harris +3 Fellow – \$4,000 to \$4,999 in cumulative giving to The Rotary Foundation

Paul Harris +4 Fellow – \$5,000 to \$5,999 in cumulative giving to The Rotary Foundation

Paul Harris +5 Fellow – \$6,000 to \$6,999 in cumulative giving to The Rotary Foundation

Paul Harris +6 Fellow – \$7,000 to \$7,999 in cumulative giving to The Rotary Foundation

Paul Harris +7 Fellow – \$8,000 to \$8,999 in cumulative giving to The Rotary Foundation

Paul Harris +8 Fellow – \$9,000 to \$9,999 in cumulative giving to The Rotary Foundation

Major Donor - \$10,000 or more in cumulative giving to The Rotary Foundation

Paul Harris Society – stated commitment to donate at least \$1,000 per year to The Rotary Foundation. You must submit the form at <https://www.rotary.org/en/about-rotary/history/paul-harris-society> to be recognized as a member.

PolioPlus Society – stated commitment to donate at least \$100 per year to PolioPlus

Arch Klumph Society – \$250,000 or more in cumulative giving to The Rotary Foundation

Foundation Reports

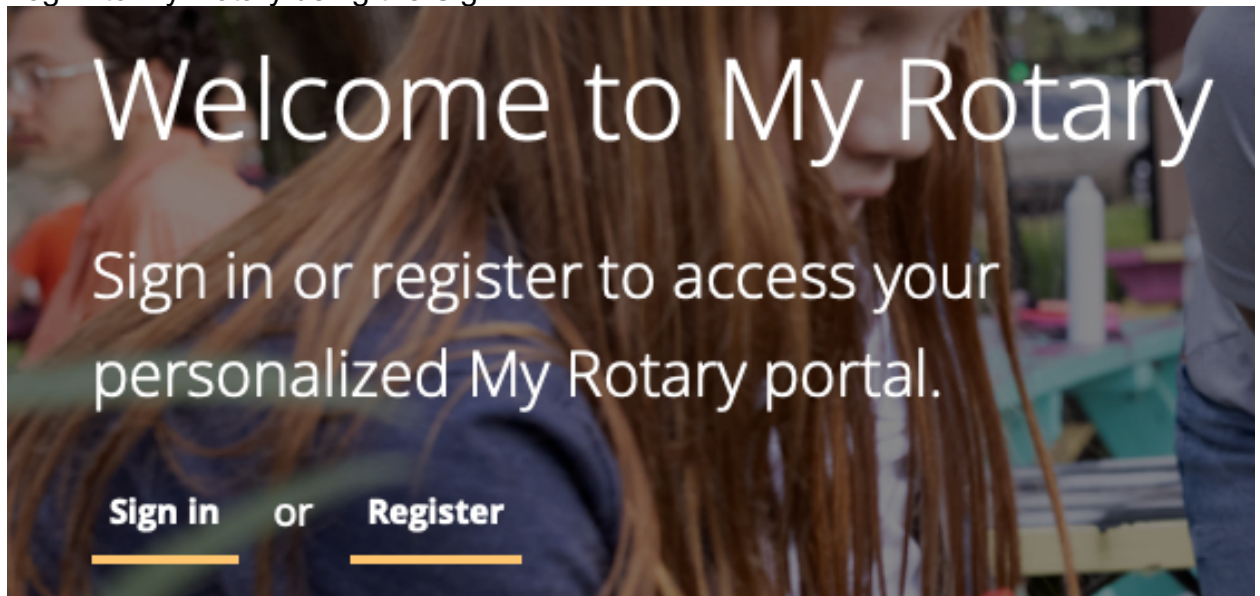
1. Access [rotary.org](https://www.rotary.org)
2. In the upper right corner, click on My Rotary

[MY ROTARY](#) | [CLUB FINDER](#) | [SEARCH](#)

JOIN

DONATE

3. Log in to My Rotary using the Sign In Link



Alternatively, you can Register for My Rotary if you do not already have an established access account

4. Enter your username and password, then click Sign In

Sign in

Login email address

Password

Remember me

[Sign in](#)

[Need help signing in?](#)

5. Click on My Rotary in the top menu, then Membership and Foundation Reports

Rotary  [My Rotary](#) [Donate](#) [Refer](#) 

[My Rotary](#) [Participate](#) [Events & Connections](#) [Knowledge & Resources](#) [Who We Are](#)

Club Poipu Beach, Kauai (Rotary Club) Change or Rejoin Club Club Resources	Membership and Foundation Reports Rotary Club Central Refer a New Member	Travel and Expenses Awards & Recognition Awards Membership Society Rotary Citation Donor Recognition	Community Marketplace Club Management Systems & Providers Official Rotary Apps Marketplace Resources	 Rotary Club Central Set club goals and track how you're doing.
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6. Select View Report under Individual Reports – Contributions and Recognition

Reports

Individual Reports

Contributions & Recognition

☆ **Donor History Report**

View your contributions to The Rotary Foundation and track your progress toward achieving recognition.

[View report](#) | [Give online](#) | [Mail your contribution](#)

7. The report will take some time to generate. When it is ready, the screen below appears.

View Your Contribution History

Click on the report name that you want to view. You will see a report opening in a new window or tab.

Individual Reports

- [Donor History Report](#)

Please note: Contribution data updates may take up to 4-6 days to be reflected on the reports upon receipt by RI. During peak periods, it may take 8-11 days to be reflected.

8. Click the Donor History Report link to display the report
9. Two tabs are visible at the bottom of the window: Overview, the one initially displayed, and Transaction Detail. Transaction Detail displays the Date, Designation, Amount, and more for each contribution to The Rotary Foundation.

Information on the Overview tab includes

Recognition – Your Name

Major Donor or AKS – current major donor (\$10,000+) or Arch Klumpf Society (\$250,000+) status

Bequest or Legacy Society – current Bequest (\$10,000+) or Legacy Society (\$1,000,000+) status

Benefactor – current Benefactor (\$1,000 - \$9,999) status

Paul Harris Society Eligible – shows current and previous year Paul Harris Society (giving of \$1,000+ per year) eligibility
Sustaining Member – shows current and previous year Sustaining Member (giving of \$100 - \$999 per year) status
Every Rotarian Every Year (US\$25) – shows current and previous year Every Rotarian Every Year individual (not club) eligibility
Paul Harris Fellow – current Paul Harris Fellow status
PHF Recognition Amount – cumulative personal donations to The Rotary Foundation
Foundation Recognition Points – number of points that can be given to another person on your behalf *
Paul Harris Society Member – displays whether you are a current Paul Harris Society member
Gifts may include giving from a partner or spouse
Annual Fund – cumulative giving to the Annual Fund for the member and a defined partner (if needed)
This is broken out by type of giving
PolioPlus Fund – cumulative giving to PolioPlus for the member and a defined partner (if needed)
Bequest/Legacy Society and Benefactor Commitments may include giving from a partner or spouse
Determination of method of bequest and expected amount of bequest

Information on the Details tab includes

Date – date of donation, sorted with most recent first
Type – method of credit, usually Contribution, could be Transfer In or Out
Donor Name – name of donor
Designation – destination of the donation
Notes – used for internal Rotary International tracking
Contribution – transaction amount
Transfer – if Type is Transfer In or Out, the number of points transferred
Credit Organization – Club or organization credited for the donation

* Foundation Recognition Points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund or PolioPlus. Donors receive one Foundation Recognition Point for each US dollar contributed to these funds. Donors can extend Foundation Recognition Points to others to help them become a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation Recognition points do not count towards Major Donor recognition.

Planned Giving

The Rotary Foundation can be a beneficiary in your will or estate plan. Rotary International recognizes multiple bequest amounts, including

- Benefactor – a bequest of \$1,000 to \$9,999 in your will or estate plan
- Bequest Society – a bequest of \$10,000 to \$999,999 in your will or estate plan
- Legacy Society – a bequest of \$1,000,000 or more in your will or estate plan

Starting at the \$25,000 bequest level, you can personalize your legacy with a separately identified fund that bears your name, your family's name, or the name of a loved one.

With more significant gifts, it may be possible to narrowly direct funds to specific programs or regions.

To notify Rotary International of your bequest, complete and submit the form at <https://my.rotary.org/en/document/your-rotary-legacy-notification-card>

Advisors

Advisors are available to help you with legacy giving. Our contacts are Rick Golba, District 5000 Endowments and Major Gifts Chair

poipurotaryrick@gmail.com

Laura Mello, Zone 26 Major Gifts Officer

laura.mello@rotary.org

Shirley Grace, Zone 26 Regional Rotary Foundation Coordinator

shirleygrace@icloud.com