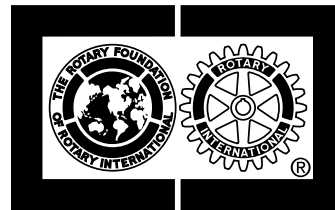


District Rotary Foundation Seminar Manual for Nonpilot Districts



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Getting Started — Program Content

Commonly Asked Questions

“Who is responsible for conducting a district Rotary Foundation seminar?”

The district’s leadership, including the district Rotary Foundation committee. You can call upon your regional Rotary Foundation coordinator for expertise as an adviser, counselor, and/or keynote speaker.

“Who should be invited to attend a district seminar?”

While the district’s entire membership should be encouraged to attend, your target audience should include club presidents, club presidents-elect, club Foundation chairs, club Foundation committee members, the district governor, the district governor-elect, assistant governors, International Service chairs, and new members wanting to learn about The Rotary Foundation (TRF).

“Why are district Rotary Foundation seminars held?”

A seminar provides the opportunity to

- Motivate Rotarians to support and participate in TRF programs
- Emphasize the benefits of participating in TRF programs to Rotary clubs and Rotarians
- Outline basic TRF programs and policies
- Update Rotarians on changes in TRF programs or policies and outline goals for the upcoming year
- Recognize individuals and clubs in the district for outstanding contributions to TRF
- Answer questions about TRF programs and activities

Seminar goals should include

- Increasing financial support of the Humanitarian Grants Program and Educational Programs
- Encouraging the establishment of club Foundation committees

- Equipping club leaders with the tools and training to motivate their club members to support TRF

“When should district Rotary Foundation seminars be held?”

As early in the Rotary year as possible, before 15 November (before 30 September preferred). In some instances, the district seminar may be held after district leaders attend the regional Rotary Foundation seminar conducted by their regional Rotary Foundation coordinator.

Assessing Your District’s Needs

Listen to what your fellow Rotarians have to say. Pay particular attention to club Rotary Foundation chairs, club presidents, club presidents-elect, district governors, and assistant district governors. Use their input to create an agenda that addresses their interests and concerns while also conveying information that you and the Foundation Trustees have determined to be essential. Presenting benefits of participation in TRF programs and supporting TRF financially are critical. Do not feel that all information must be presented, because it is unlikely that you will be able to cover everything related to TRF. The seminar content should be relevant to the Rotarians in your district.

Designing a District Seminar Agenda

The following are sample agendas that you may adapt to your district’s needs.

Sample Four-Hour Agenda

08:00-08:30 Registration

Opening Plenary Session

08:30-08:45 Announcements and Introduction, including seminar goals and objectives

08:45-09:15 Introductory Motivational Presentation covering district Foundation successes and accomplishments of the past year. *The most effective presentations include slides, video, and inspirational remarks by a program beneficiary(ies).*

09:15-09:45 Update
General Foundation update highlighting program and/or policy changes and goals for the upcoming year

09:45-10:00 Break

10:00-10:45 *Workshop/General Group Discussion Session 1*

10:45-10:55 Transit to next workshop

10:55-11:40 *Workshop/General Group Discussion Session 2*

11:40-11:50 Transit to Plenary Hall

Closing Plenary Session

11:50-12:20 Closing Motivational Remarks (*Choose a format not used in the opening session.*)

12:20-12:30 Seminar Evaluation

Sample Six-Hour Agenda

08:00-08:30 Registration

Opening Plenary Session

08:30-08:45 Announcements and Introduction, including seminar goals and objectives

08:45-09:15 Introductory Motivational Presentation covering district Foundation successes and accomplishments of the past year. *The most effective presentations include slides, video, and inspirational remarks by a program beneficiary(ies).*

09:15-09:45 Update
General Foundation update highlighting program and/or policy changes, goals for the upcoming year

09:45-10:00 Break

10:00-11:00 ***Workshop/General Group Discussion Session 1***

11:00-11:10 Transit to next workshop

11:10-12:10 ***Workshop/General Group Discussion Session 2***

12:10-13:00 Lunch
Meal followed by a 20-minute motivational presentation in a format not used during the opening session;

or as an alternative option,

Meal followed by 20-minute presentation of recognition to Rotary Foundation donors

13:00-13:50 ***Workshop/General Group Discussion Session 3***

13:50-14:00 Transit to Plenary Hall

Closing Plenary Session

14:00-14:20 Closing Motivational Remarks (*Choose a format not used during a previous motivational presentation.*)

14:20-14:30 Seminar Evaluation

Additional Tips for a Successful District Seminar

Suggested Seminar Topics

The following possible topics for workshops and/or group discussion sessions are based on the specific leadership roles in each district. You may wish to combine sessions for topics that duplicate more than one role and eliminate or add sessions, depending on training received at other meetings. Also note the list of additional topics that may be of general interest to Rotarians.

Club presidents-elect, club Foundation chairs, club presidents, Foundation committee members, and other Rotarians

- Foundation Overview
- Foundation Goal-Setting — Action Steps and Timetables
- Foundation Programs — Benefits to Rotary Clubs and Rotarians for Participation
- Fundamental Elements of Fund Development
- Raising Money for Our Foundation
- Foundation Responsibilities
- Foundation Month Activities
- Reading Foundation Reports
- Good Foundation Programs for Your Rotary Club
- Achieving Foundation Goals — Program Participation and Fund Development
- The Future of The Rotary Foundation
- The Permanent Fund
- Humanitarian Grants Program
- PolioPlus
- Educational Programs

- Stewardship of Foundation Funds
- Reporting on Program Activities to The Rotary Foundation

Additional Seminar Topics

- Promoting the Foundation
- Program Evaluation: What's Working and What Isn't
- Foundation Alumni
- Understanding *SHARE*

General Planning Steps

You need to address several logistical issues when planning your district Rotary Foundation seminar. These include budget, site selection, promotion, registration, printing, sergeants-at-arms, and (for larger districts) housing and transportation. To complete these tasks, you should appoint a committee to handle each area.

To begin planning your seminar, you will need to

1. *Develop an action plan and timetable for the seminar.*
2. *Create a working draft of your Rotary Foundation seminar agenda* that will meet your objectives and be appropriate for your district. Think about both what has worked in the past and what has needed improvement. Solicit input from Rotarians in your district. Build on the experience of those who have served before you.
3. *Appoint a seminar committee.* Choose Rotarians well-suited to their respective tasks. When you are satisfied with the makeup and structure of your committee, send members a formal invitation to serve. Specify their responsibilities.
4. *Identify speakers, panelists, group discussion leaders,* and all other key participants for the seminar. Potential speakers include TRF alumni, your regional Rotary Foundation coordinator, and members of the zone team. Send each a formal invitation to participate, including a clear description of what you would like them to do. Work with all key participants in developing their material.
5. *Secure a location* that meets your needs. Be clear on details related to your plenary sessions, discussion group rooms, meal arrangements, registration setup, overnight lodging (if applicable), and other logistical needs specific to your program.
6. *Identify sergeants-at-arms, using committee members wherever appropriate.*
7. *Notify all participants of the meeting dates* as soon as possible. Prepare and mail invitations or other advance materials including registration materials. Follow through wherever necessary.
8. *Clarify expenses.*

In addition

- Begin preparations as early as possible.
- Plan carefully and adhere to a schedule.
- Delegate responsibility to others when appropriate.
- Budget strictly.
- Use the Secretariat staff, particularly TRF personnel, as resources.
- Keep complete records for next year's seminar planners.
- Allow for the unexpected.

Timetable

The Rotary Foundation Trustees suggest that district Rotary Foundation seminars be held as early in the Rotary year as possible — before 15 November (before 30 September preferred). This timetable will allow Rotarians to act upon what they've learned, helping you to achieve your goals before the end of the year.

This worksheet provides space for planning your Rotary Foundation seminar. Contact other Foundation leaders and program participants to confirm plans or gather additional information. Adapt the suggested time frames and activities to your needs.

Timing

Activity

- | | | |
|----------------------------|-------|--|
| 18 weeks before | _____ | Contact your district governor regarding your intent to hold a seminar. Invite the district governor. |
| | _____ | Select a seminar committee. |
| | _____ | Send personal invitations and registration forms to targeted participants: club presidents, club presidents-elect, district governor-elect, assistant governors, district subcommittee chairs, club Foundation chairs, and other special guests, such as your regional Rotary Foundation coordinator (RRFC) and assistant RRFCs. |
| | _____ | Arrange for project and/or other exhibits. |
| 8 weeks before | _____ | Order seminar materials from TRF. |
| | _____ | Arrange with venue to receive shipment of seminar materials. |
| | _____ | Confirm final plans for programs and speakers. |
| 3 to 7 days* before | _____ | Give guarantees for food and beverage functions to seminar site (*or due date as determined by seminar site). |
| Within 45 days | _____ | Submit Post-District Rotary Foundation Seminar Evaluation to your regional Rotary Foundation coordinator. |

Budget

Work within a seminar budget that is based on estimated attendance, with a sufficient reserve to allow for the unexpected. Once allotments are fixed, keep deviations to a minimum. *If your seminar expenses are greater than your budget (or revenue), TRF will **not** pay the difference.*

Evaluation

Evaluation is an essential aspect of every effective training program. Adapt the following sample evaluation forms to your needs as a tool for evaluating your Rotary Foundation seminar.

The Post-District Rotary Foundation Seminar Evaluation on pages 11-12 is not a sample. *Submit the completed evaluation to your regional Rotary Foundation coordinator at the conclusion of your district Rotary Foundation seminar.*

Sample Evaluation: Individual Presentation

Please return completed evaluation to the seminar leader.

Presenter's name: Joe Rotarian

Topic: Tools and Techniques for Promoting the Foundation

Goal: To demonstrate a variety of tools and techniques used in promoting TRF programs and financial support.

Please rate the following statements using the scale below:

- 1 = Exceeded expectations
- 2 = Fully met expectations
- 3 = Below expectations
- 4 = Significantly below expectations

How well did the session

- | | | | | |
|---|---|---|---|---|
| 1. Achieve the above-stated goal? | 1 | 2 | 3 | 4 |
| 2. Introduce you to new ideas? | 1 | 2 | 3 | 4 |
| 3. Provide relevant information that you can adapt for use in your district or club? | 1 | 2 | 3 | 4 |
| 4. Meet your level of understanding and expertise (e.g., was it too technical — or too simple)? | 1 | 2 | 3 | 4 |
| 5. Adequately provide an opportunity for questions and discussion? | 1 | 2 | 3 | 4 |

Additional comments:

Post-District Rotary Foundation Seminar Evaluation

Please submit this report, along with a copy of the seminar agenda, to your regional Rotary Foundation coordinator and district governor at the conclusion of your seminar.

District: _____

Seminar date: _____

Seminar site: _____

Total number of participants at the seminar: _____

Please note the total attendance for each of the following groups:

Club presidents _____

Club presidents-elect _____

Assistant governors _____

District Foundation subcommittee chairs _____

Club Foundation chairs _____

Other _____

Total number of clubs represented: _____

What is your action plan for communicating Foundation information to these clubs this year?

Did your regional Rotary Foundation coordinator participate in your seminar?

(Statements continue on the reverse side.)

Describe any concerns about Foundation matters that were expressed at the seminar.

Did any other Rotary officers (e.g., directors, trustees) attend the seminar? If so, list them and explain their role in the seminar.

Provide details on suggestions made at the seminar about Foundation programs, fund development efforts, policies, etc.

Please share your observations and comments about the seminar.
(Use a separate sheet, if necessary.)

Submitted by: _____

Current Rotary position: _____

Date submitted: _____

Thank you for your continued support of The Rotary Foundation.

Seminar Training Materials

Introduction — Using These Materials

The materials in this section will help you customize your district Rotary Foundation seminar. Go to the section for the program or activity you have chosen to include in your seminar agenda. There you will find background information to use when making your presentation. This includes a brief description of the program or activity, sample of successful projects, suggested discussion topics, and answers to commonly asked questions.

If you will not be presenting the topic, please forward the relevant materials to the selected presenter.

Effective Presentations

The following is a recommended format for making an effective presentation. Using this format, you can draw upon materials in this publication as well as your own experience with the program you are presenting.

I. Introduction

Introduce yourself, including your Rotary club, position, and experience with the program that you are presenting (e.g., any post you held associated with the program, such as district GSE subcommittee chair or Matching Grant project contact).

II. Motivation

Tell a motivational story about the program that illustrates the benefits of participating. This could include a successful project completed by one of the clubs in the district.

III. Criteria

Use the handouts or slides on the CD-ROM (to be delivered in a separate mailing and available on the RI Web site) to outline the criteria of the program.

Distribute copies of the summaries to participants to familiarize them with the program and provide them information about program criteria, deadlines, leadership responsibilities, and staff contacts.

IV. Program Relevance

Based on your experience, explain to participants how the program is relevant to them and how they can participate in it. Minimize discussion of features and procedures and maximize discussion of benefits to the world, Rotary clubs, and individual Rotarians. For example, if the presentation is on Ambassadorial Scholarships, some clubs may choose to promote the program actively and endorse candidates for the district to consider. Other clubs may choose to have former Ambassadorial Scholars speak at their meetings. Another club may have one of its members serve as a host counselor.

V. Questions and Answers

Give participants time to ask questions about the program. If time allows, pose questions from the “Suggested Discussion Topics” (included after each TRF program summary in this manual) for participants to discuss.

Timing — The above format is suitable for a 20-30 minute presentation, depending on the time provided for questions and answers. This format may be modified to suit the audience’s needs or conform to the seminar schedule.

Selected Publications List

The following is a recommended list of general TRF publications for use at your district Rotary Foundation seminar. Unless noted otherwise, these publications are free. Often, it is best to display materials on an information table, allowing participants to choose those of interest to them. A general rule is to order one publication for every four participants. Publications about specific TRF programs or activities are listed in individual TRF summaries in this manual.

Publications and application forms with a catalog number may be ordered from Publications Order Services at RI World Headquarters (phone: 847-866-4600; fax: 847-866-3276; e-mail: shop.rotary@rotary.org), the online catalog at shop.rotary.org, or the RI office serving your area. Many are also available for download from the RI Web site.

You may also use the order form in the *RI Catalog* (019) to mail your request for materials and publications to world headquarters or the RI office in your area. **Please allow at least six weeks for processing and delivery.** The *RI Catalog* contains a complete list of TRF publications and audiovisual materials, which are available in English (EN), French (FR), Japanese (JA), Korean (KO), Portuguese (PT), and Spanish (ES), unless noted otherwise.

Title	Catalog #	Unit Cost (US\$)
Educational Programs		
Rotary World Peace Fellowships Leaflet*	084	Free
Rotary World Peace Fellowships Application*	083	Free
Rotary World Peace Fellowships Poster	075	Free (limit 1)
Rotary Centers for International Studies Program Guide for Rotarians	085	Free
Ambassadorial Scholarships and Rotary Grants for University Teachers Leaflet	132	Free (limit 25)
Rotary Grants for University Teachers Application		Web only
Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers	012	Free (limit 2)
Group Study Exchange Brochure	160	Free
Group Study Exchange: Program Guide for Rotarians	165	Free
*Recommended that 083 and 084 be ordered and distributed together		
Fund Development		
Named Funds	110	Free (limit 100)
Benefactor Commitment Card	149	Free (limit 100)
Two Needs, Two Ways of Giving	173	Free (limit 100)
Securing the Future	183	Free (limit 100)
TRF Global Contribution Form	123	Free
Invitation to the Bequest Society	097	Free (limit 100)
Bequest Society Membership Card	098	Free (limit 100)
Publicly Traded Securities (USA and Canada only)	175	Free (limit 100)
Life Income Gifts (USA only)	109	Free (limit 100)
Donor Advised Fund Leaflet (USA only)	382	Free (limit 100)
Every Rotarian, Every Year Brochure	957	Free
Every Rotarian, Every Year DVD	978	\$15.00
Every Rotarian, Every Year Rotary Foundation Sustaining Member Badge Stickers	956	Free (sheet of 64)

Title	Catalog #	Unit Cost (US\$)
Humanitarian Grants Program		
The Guide to Health, Hunger and Humanity (3-H) Grants		Web only
The Guide to Matching Grants	144	Free (limit 5)
Matching Grant Application		Web only
Best Practices for Managing Your District Simplified Grant	156	Free
Volunteer Service Grants Brochure	150	Free
Volunteer Service Grant Application		Web only
Operations and Administration		
The Rotary Foundation Quick Reference Guide	219	Free
The Rotary International and Rotary Foundation Annual Report	187	Free
Rotary Foundation Facts	159	Free
Rotary Foundation Trustee Goals	208	Free
PolioPlus		
Rotary's US\$200 Million Challenge (DVD)	985	\$15.00
PolioPlus Headliner Kit		Web only
Rotary's US\$200 Million Challenge Brochure	986	Free
Rotary's US\$200 Million Challenge Poster	987	Free (limit 2)
Conquering Polio (Book on CD)	329	\$5.00
Posters		
The Rotary Foundation Logo Poster	318	Free
Every Rotarian, Every Year Posters (set of two)	959	Free (limit 2)

Club Rotary Foundation Committee Chair

Role of the Club Rotary Foundation Committee Chair

A segment of the district Foundation seminar should be devoted to training the club Foundation chair. Refer to the *Club Rotary Foundation Committee Guide* (155-EN).

Club Rotary Foundation Chairs Seminar: Sample Agenda

For: Club Foundation chairs, club presidents and presidents-elect, international service chairs, community service chairs, members interested in Foundation programs, assistant governors

08:00	Registration and Coffee
08:30	Introductions
08:40	Why Are We Here?
08:50	Rotary Foundation of Rotary International — Overview
10:00	Role of the Club Rotary Foundation Chair How Our Rotary Foundation Can Help the Club President, International Service Chairs, and Community Service Chairs
10:30	Matching Grants — A Tool for the Club
11:00	Break
11:10	District Simplified Grants — Another Tool for Your Club
11:30	Promoting Educational Programs in Your Community
12:00	Raising Funds from Rotarians for the Foundation (EREY)
12:30	Luncheon Buffet
13:00	Keynote Address (During Lunch)

13:30	Effective Use of Foundation Alumni
13:50	Where to Find a Good Program
13:55	District Support for the Club Foundation Chair
14:00	Zone and RI Support for the Club Foundation Chair
14:10	Recognition and Reading Club Foundation Reports
14:30	Questions and Answers
14:55	Inspirational Remarks in Summary
15:00	Adjournment

Requirements:

- Room setup in classroom style
- Name badges and tent cards
- Screen, overhead projector, two flip charts, markers
- Podium with microphone, two portable microphones, if possible

Humanitarian Grants Program

The Rotary Foundation's Humanitarian Grants Program brings Rotary clubs and districts together in an international partnership that promotes understanding between different cultures. Clubs and districts are encouraged to use humanitarian grants to help fund projects that achieve a better world through

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

District Simplified Grants

The purpose of the program is to allow districts to use a portion of their District Designated Fund (DDF) to support service or humanitarian projects. Districts may choose to use their District Simplified Grant for multiple local or international projects.

Sample District Simplified Grant Project

District 1234 has US\$20,000 to spend and has decided to divide the funds in \$5,000 increments to implement four different projects to benefit the neediest communities. The district holds a competition and chooses the following top four service projects, which provide

- Art supplies, musical instruments, and books for an inner-city school art program
- Books for a school district in Addis Ababa, Ethiopia
- Computers, telephones, and pamphlets for a community women's shelter
- A two-months' supply of food for a local homeless shelter

Suggested Discussion Topics

- How will our district determine how grant funds will be spent?
- How can our district use grant funds to support the efforts of clubs?
- How can this program benefit your Rotary club?
- What is the district's role in District Simplified Grants?
- If a district decides to implement a project that is not local, what is the district's responsibility to the international community? How can we avoid the colonial mindset and make sure we aren't imposing our wishes on another community?

Commonly Asked Questions

How many District Simplified Grants can the district receive per year?

One grant per Rotary year. Districts can receive up to 20 percent of their DDF based on annual giving three years prior. For those districts that have more than US\$25,000 available, payment will be made based on a spending plan. The district does not have to spend the entire amount on one project, but may sponsor many different projects. Although the grant funds may be distributed to many clubs, the district is responsible for submitting progress and final reports to TRF.

Can the district spend the funds as it sees fit?

The district must identify appropriate projects to support and is responsible for ensuring that all activities and grant fund expenditures comply with TRF guidelines. Failure to do so will require the district to return grant funds and may bar it from receiving future grants for up to five years. Before distributing any funds, the district should become familiar with TRF eligibility guidelines.

How can clubs become active in the District Simplified Grants program?

The district is responsible for all aspects of the grant's life cycle from planning, implementing, and overseeing expenditure of grant funds to providing detailed reports. This means that the clubs must work with district leadership to solicit funds. The district must determine how grant funds are used, including whether they are spent on one large project or dispersed throughout the district for several small club projects. If the district decides to give funds to different clubs, it is responsible for reporting to TRF on the full grant amount. However, participation in the District Simplified Grants program should be thought of as a collaborative effort.

How does the district access these funds?

Districts must submit a request to TRF. Districts are strongly encouraged to submit their request in the Rotary year prior to funds being available.

Can a club apply for a District Simplified Grant?

No. A club must follow the guidelines/criteria established by its district.

Can two districts combine DDF to implement a joint project? If so, who would be responsible for reporting on the project?

Districts may collaborate on projects. However, TRF requires each district to report separately on the use of grant funds. This means each grant amount must be individually accounted for and the funds must not be commingled.

Volunteer Service Grants

Volunteer Service Grants support the international travel of qualified Rotarians and spouses of Rotarians to provide a needed service to a community and/or to plan the implementation of a needed project in a community.

Sample Volunteer Service Grant Projects

- A Rotarian education specialist from Kenya who serves in an Appalachian (USA) school district for one month to work with teachers on curriculum development
- Two Rotarians who travel to Chita, Russia, to finalize plans for a Matching Grant project to support a community mental health center

Suggested Discussion Topics

- How can Volunteer Service Grants be used to support District Simplified Grants or Matching Grants?
- How should Rotarians determine whether or not their skills or project idea could be implemented in the project location?
- How can this program benefit your Rotary club?

Commonly Asked Questions

Who can receive a Volunteer Service Grant?

Qualified Rotarians and their spouses.

What does “qualified” mean?

Eligibility for travelers is based on 1) a defined community need; 2) a need that can be met by the experience and skills of the Rotarians/team; and 3) an understanding that the skills and experience are not available in the community.

Will TRF locate an international service opportunity for Rotarians?

Volunteer Service Grants is not a placement program. All contacts and arrangements are made directly between the volunteer and the project. The Rotary Volunteers program through Rotary International provides two resources to support Rotarian volunteers. The Rotary Volunteers International Site Database contains Rotary projects worldwide that are seeking volunteers. This database identifies individuals who are interested in volunteer work throughout the world. The other resource is ProjectLINK, a searchable database on the RI Web site at www.rotary.org. For more information, contact the RI Programs Division.

Can I volunteer at a non-Rotary project that is not administered by Rotarians?

Yes. However, you must be invited by the Rotary club closest to your project site. You should submit a letter of invitation stating the exact dates of your vol-

unteer term and signed by the club president, with your completed Volunteer Service Grant application. In addition, the letter should confirm that the skill or project is needed in the community.

Can I volunteer where there is no Rotary club within a reasonable distance?

No. The Volunteer Service Grant is a partnership between two Rotary clubs. The intent of the Humanitarian Grants Program is to assist in developing stronger Rotary networks as clubs from different nations work together to implement projects.

Matching Grants

Through Matching Grants, The Rotary Foundation matches contributions raised by Rotary clubs and districts for international humanitarian projects involving Rotary clubs or districts in two or more countries.

Sample Matching Grant Projects

- To help provide a drill rig, training, and community geological survey to the Arusha Town Council in Tanzania so that the township can install wells on an as-needed basis
- To help purchase medical equipment for a hospital in Mumbai, India, that serves the indigent population

Suggested Discussion Topics

- What elements are needed to establish good communication between project sponsors?
- How do sponsors know if the project is the most needed and will be effective in the community?
- Why is it important to involve the receiving community?
- How can this program benefit your Rotary club?
- Why are local Rotarians the best experts for projects in their community?
- How can we avoid the colonial mindset and make sure we are not imposing our wishes on another community?
- How can a good project partner be identified?

Commonly Asked Questions

What are the funding limits for Matching Grants?

The minimum grant award is US\$5,000, and the maximum award is \$150,000. Grant requests over \$25,000 are categorized as Competitive Matching Grants and are reviewed twice annually by the Trustees.

What is the match provided by TRF?

TRF provides a 1:1 match for District Designated Fund (*SHARE*) contributions and a 0.5:1 match for new cash contributions.

Can TRF make a grant payment directly to a beneficiary?

No. TRF awards grants to Rotary clubs and districts. The sponsors must have full control of grant funds and account for their expenditure. TRF grants support the endeavors of Rotarians, not other organizations. Often organizations help implement the project, but Rotarians must always be involved.

What should we look for in a project partner?

It can be challenging to establish a good working relationship with someone a long distance away, but you should look for the following:

- Personal relationships and connections to the community. Nothing can substitute for a friendship between Rotarians.
- Evidence of previous successful projects, including
 - Implementation
 - Reporting
 - Sustainability
- Good communication. Do you have all the necessary information to make good, regular contact with your partner club?

Health, Hunger and Humanity (3-H) Grants

Health, Hunger and Humanity (3-H) Grants are awarded to fund large international long-term, self-help, and grassroots development projects that use a sustainable, integrative approach to address humanitarian needs. 3-H grants range from US\$100,000 to \$300,000 paid out over two to four years.

Sample 3-H Grant Projects

- Implementing a literacy program in the Solomon Islands
- Drilling wells and constructing solar-powered pumping systems for irrigation in Haiti
- Providing sanitation, drinking water, and agricultural and health training to indigenous people in Brazil
- Establishing a vocational training and job placement center for youth in Brazil

Suggested Discussion Topics

- What are the elements of a successful 3-H project?
- How can this program benefit your Rotary club?
- Why is it important to have personal, active Rotarian participation?
- What is meant by saying 3-H projects must be self-help in nature?
- Why is it important that 3-H projects be designed to be self-sustaining after 3-H funds are spent?

Commonly Asked Questions

What does “integrative” mean?

An integrative approach incorporates multiple program components to address humanitarian needs, including a combination of sustainable activities such as training, community participation, Rotary Community Corps, capital assets, and technical expertise from Rotarian and other sources.

What are the requirements for 3-H grant sponsor partnerships?

The primary host and international sponsor clubs/districts of a 3-H application must have successfully worked *together* as primary sponsors of a Matching Grant project within five years of submitting their 3-H application to be eligible for consideration. All projects must involve Rotary clubs and districts in at least two different countries with a significant number of Rotarians actively participating in the project.

Can 3-H funds be given to a school, foundation, hospital, or other organization so that it can do its own project?

No. Another organization may participate in a 3-H project, but only if Rotarians initiate, control, and conduct the project as its sponsors. In addition, the project must be known by the public as a Rotary project, but named in accordance with the guidelines set forth in the *Manual of Procedure 2007* (035). These guidelines are also summarized in the Humanitarian Grants and Policies Guidelines section of the *District Rotary Foundation Committee Manual* (300).

Is a financial contribution from Rotarians required?

Yes. The Rotarians cosponsoring the project must contribute at least 10 percent of the total 3-H grant award.

Can I get Paul Harris Fellow Recognition credit for funds contributed to a 3-H project?

Yes. Cosponsors are eligible for Paul Harris Fellow Recognition when making their contribution.

What is the key to having a long-lasting, productive 3-H project?

Ensure that the benefiting community will have ownership of the project, including the new skills and knowledge needed to sustain it indefinitely.

Stewardship of Humanitarian Grants

Stewardship improves project quality, ensures TRF’s credibility, and encourages Rotarian participation throughout the life of a project. Agreeing to provide scrupulous stewardship of grant funds is a condition of all grant awards. Following responsible financial practices ensures that all project funds ultimately benefit those in need.

TRF depends upon the goodwill and generosity of its donors — careful financial management sustains the confidence of these donors. TRF’s credibility is at risk if donors do not have faith in its ability to wisely grant funds or the ability of Rotary clubs or districts to wisely use them. Contributions received to support club and district projects could decrease as a result.

Providing grant reports, essential to financial stewardship, not only supports TRF's efforts to continue "doing good in the world," but also allows TRF to maintain its charitable, not-for-profit, tax-free status with the U.S. Internal Revenue Service. This status requires TRF to document how its grant awards have been used to aid charitable projects; thus clubs and districts must fulfill their reporting responsibilities.

Complying with financial stewardship procedures requires close communication between participating clubs. To properly complete humanitarian grant applications and obtain TRF awards, partnering clubs must jointly devise a plan that specifies how funds will be used to meet project goals. By critically examining this plan, the clubs can more effectively implement the project, improving its quality and encouraging wide Rotarian participation.

Suggested Discussion Topics

- What are the basic financial stewardship responsibilities required for all TRF grants?
- What steps can be taken to ensure responsible fiscal management before starting a humanitarian grant project?
- Why is it important that project participants maintain frequent communication?
- What does stewardship mean to project participants, project beneficiaries, and TRF?

Commonly Asked Questions

How can a club or district fulfill its stewardship responsibilities?

- Keep a complete accounting of all project expenses.
- Maintain copies of all receipts for at least five years.
- Report progress and project successes to TRF and project sponsors.

Why are reports required?

- Fulfill TRF's reporting obligations and maintain its charitable, not-for-profit status.
- Reflect on project accomplishments, assess the project's effectiveness, and consider lessons to apply to future projects. For example, would you work with the same cosponsor again on a different type of project? What would you do differently next time?
- Share project accomplishments with the Rotary world through Rotary publications.
- Provide TRF staff with feedback on how to improve programs.

What information must be included in all reports?

- A detailed description of the project
- An explanation of how Rotarians from the host and international partner clubs/districts participated in the project
- A full description of Rotarian oversight and management

- A statement of income and expenses
- A bank statement that correlates to the statement of income and expenses
- A narrative statement about the beneficiary
- The role of the cooperating organization (if applicable)

Who is responsible for submitting the reports?

Both project partners. However, one of the partners should take a leadership role to complete the report. Generally, the club or district that has control of project funds prepares the report and solicits input from its partner before submitting the report to TRF.

PolioPlus

PolioPlus is Rotary's commitment to the certification of the eradication of polio. PolioPlus Grants support the global laboratory network that is necessary to identify polio cases, provide social mobilization tools to raise awareness of polio immunization activities, and provide operational support to international efforts to immunize children and eradicate polio worldwide.

PolioPlus Facts

- The goal of the PolioPlus program is the global certification of polio eradication. By eradication, the World Health Organization, Global Commission on Certification, and Rotary mean interruption of the transmission of the wild poliovirus.
- By the time the world is certified polio-free, Rotary will have contributed US\$1.2 billion to the global polio eradication effort. Over 122 countries have benefited from PolioPlus Grants.
- Estimated polio cases worldwide in 2008 have declined over 99 percent from 1985.
- As of 1 January 2008, over 70 percent of the world's children lived in polio-free countries, up from 10 percent in 1988.
- The Western Hemisphere, Western Pacific, and European regions were certified polio-free, respectively, in 1994, 2000, and 2002.
- Contributions to the PolioPlus program are eligible for Paul Harris Fellow Recognition

Rotary's US\$200 Million Challenge

- The Bill and Melinda Gates Foundation has awarded The Rotary Foundation a total of US\$355 million in two challenge grants to help end polio. In response, Rotary has committed to raising a total of \$200 million by 30 June 2012. This effort is called Rotary's US\$200 Million Challenge. Together, Rotary International and the Gates Foundation will provide over a half a billion dollars toward our priority goal of a polio-free world.

- Rotary clubs and Rotarian participation in Rotary's US\$200 Million Challenge is crucial to making it a success. Rotary raised over \$60 million toward this amount in 2008. Therefore, each club is being challenged to organize a public fundraising event annually for the next three years.
- Individual Rotarians are also invited to personally take part in this effort, with special emphasis on new clubs and members who have not yet had the opportunity to participate in PolioPlus, Rotary's priority program.

Suggested Discussion Topics

- How can clubs in polio-free countries participate in PolioPlus?
- What is an effective club fundraiser in support of Rotary's US\$200 Million Challenge?
- How do we get the general public interested in Rotary's US\$200 Million Challenge?
- Is polio still a threat?

As long as polio exists, all children are at risk. Despite tremendous progress in the battle to eradicate polio, the disease still cripples thousands of children. We must not be lulled into a false sense of security. Support PolioPlus today to help ensure a safer, polio-free future for the children of tomorrow.

Commonly Asked Questions

What does my contribution do?

It helps immunize more than two billion children and strengthens the system that detects cases of polio.

Is money raised for PolioPlus eligible for recognition credit?

Yes.

How much does polio vaccine cost?

A child can be protected against polio for as little as US\$0.60 worth of vaccine.

What else do we need to do besides vaccinate?

Rotarians need to help transport vaccine and keep it cool, train and equip local volunteers to provide the vaccine, establish effective public relations to promote immunization activities, train health workers to be on the lookout for cases or the absence of cases, and confirm the presence of the virus in a laboratory.

What is the purpose of the Polio Laboratory Network?

To test stool samples for the wild poliovirus and track its transmission.

How are PolioPlus funds currently being spent?

To transport vaccine to children and strengthen global surveillance activities that identify and target areas where the virus continues to circulate.

Can SHARE funds be contributed directly to PolioPlus?

Yes. Districts are encouraged to allocate a portion of their DDF to help fund PolioPlus.

Educational Programs

Rotary Centers for International Studies in peace and conflict resolution

The Rotary Centers for International Studies in peace and conflict resolution is Rotary's major educational priority in achieving TRF's mission for world understanding and peace. Rotary Centers provide Rotary an opportunity to shape future community and world leaders dedicated to working for peace by allowing fellows to focus on hunger, poverty, human rights issues, conflict over resources, and other obstacles to peace.

Up to 60 new Rotary World Peace Fellows are selected annually on a world-competitive basis to study for one to two academic years in graduate programs leading to a master's-level degree in international relations, peace studies, conflict resolution, and related subjects. All districts are invited to submit a candidate for the world competition each year. The seven Rotary Centers are hosted by

- International Christian University, Tokyo, Japan
- University of Queensland, Brisbane, Queensland, Australia
- University of Bradford, West Yorkshire, England
- Duke University & University of North Carolina at Chapel Hill, USA
- University of California, Berkeley, USA
- Universidad del Salvador, Buenos Aires, Argentina
- Chulalongkorn University, Bangkok, Thailand

Purposes of Program

1. To advance research, teaching, and knowledge on issues of peace, goodwill, causes of conflict, and world understanding
2. To provide advanced educational opportunities for a group of Rotary World Peace Fellows, chosen from various countries and different cultures; to advance knowledge and world understanding among potential future leaders of government, business, education, media, and other professions

3. To establish a program through which TRF and Rotary clubs may become increasingly effective in promoting greater tolerance and cooperation among peoples, leading to world understanding and peace

Suggested Discussion Topics

- Selection criteria for Rotary World Peace Fellows
 - An undergraduate degree in an appropriate field and strong academic record
 - A minimum of three years combined paid or unpaid full-time work experience in a relevant field
 - Proficiency in more than one language (even if the candidate proposes to study in a country where his or her native language is spoken)
 - Demonstrated leadership skills
 - Demonstrated commitment to peace and international understanding through personal and community service activities and/or academic or professional achievements
 - Clear career goals related to the Rotary World Peace Fellowship
- The difference between Ambassadorial Scholarships and Rotary World Peace Fellowships
 - Ambassadorial Scholars may study almost any subject during their scholarship. Rotary World Peace Fellows specifically focus on international relations, peace studies, and conflict resolution.
 - Rotary World Peace Fellows are selected on a world-competitive basis.
 - Academic-Year Ambassadorial Scholars study for one academic year and generally do not complete a degree during that period. Rotary World Peace Fellows study for one to two academic years in a United States master's-level degree program or equivalent thereof.
 - Rotary World Peace Fellows participate in an annual seminar and applied field experience as part of a curriculum developed by each Rotary Center.
- How Rotarians can support Rotary Centers for International Studies and Rotary World Peace Fellows
 - Seek out and endorse qualified candidates to compete for one of the fellowships awarded on a world-competitive basis.
 - Give high priority to donating a portion of the District Designated Fund (DDF) each year to support the Rotary Centers program.
 - Earmark unused DDF to support the Rotary World Peace Fellows.
 - Identify Major Donors in your region to endow a fellowship each year with a gift of US\$25,000 or more.

Commonly Asked Questions

How much DDF should my district donate to support the Rotary World Peace Fellows?

DDF donations in any amount are welcome. All districts are encouraged to donate some amount to support this global Rotary effort. Districts that commit US\$25,000 each year or \$50,000 every other year in support of Rotary World Peace Fellows will be recognized as Peacebuilder Districts. Districts are especially encouraged to consider allocating unspent DDF intended for Educational Programs.

What happens to the money my district contributes if the fellow we endorse is not one of the finalists on a world-competitive basis?

The money contributed from the DDF is intended to support the entire class of fellows selected on a world-competitive basis; therefore, a district's DDF allocation is not connected to a specific fellow from that district. For that reason, the money will not revert back to the district if the candidate it endorses is not selected. This funding approach ensures that the top candidates worldwide are selected, regardless of whether their district can afford to fund them for the program.

Are former Ambassadorial Scholars eligible to apply for a Rotary World Peace Fellowship?

Yes, as long as they meet the other eligibility requirements.

Ambassadorial Scholarships

The Ambassadorial Scholarships program is the world's largest, privately funded international scholarship program for university-level studies. Since 1947, TRF has awarded over 37,000 scholarships. Approximately 70 percent of districts participate in the program each year by sponsoring or hosting a scholar.

Suggested Discussion Topics

- Meeting the objectives of the Ambassadorial Scholarships program

The primary purpose of Ambassadorial Scholarships — to further world understanding and peace — is well known to Rotarians. The program's objectives provide Ambassadorial Scholars and their sponsor and host Rotarians with a broader understanding of how the scholarships can be effective in furthering TRF's mission.

- Ambassadorial Scholarships program objectives

Ambassadorial Scholarships support TRF's mission of furthering world understanding and peace by

- Increasing awareness of and respect for cultural differences by sending ambassadors of goodwill to study in another country

- Instilling in scholars the Rotary ideal of Service Above Self through active participation in Rotary service projects
- Encouraging scholars to dedicate their personal and professional lives to improving the quality of life for the people of their home community and country
- Developing leaders who can address the humanitarian needs of the world community
- Influencing all areas of the world through a balanced geographical distribution of scholars
- Encouraging Rotarians worldwide to increase the educational opportunities for scholars from low-income countries
- Fostering a lifelong association between Rotary and its scholars

- Geographic distribution

In 2007-08, TRF supported 673 scholars for study in over 70 different countries. Only 11 percent of these scholars studied in low-income countries. Each district is encouraged to select scholars with a study destination different from scholars it has previously sponsored. By selecting scholars interested in studying in a country that hosts few scholars, districts can help the program meet its objective to impact all areas of the world through balanced geographical distribution of scholars. Moreover, by selecting scholars interested in studying in low-income countries, districts can help the program achieve its objective to develop leaders who can address the world community's humanitarian needs.

- Study fields

Although Ambassadorial Scholars are not restricted as to which academic field they may pursue, TRF urges Rotary clubs and districts to endorse candidates whose academic studies will have a practical humanitarian impact on their community.

- Participation by low-income countries

Districts can support the Scholarships Fund Pool for Low-Income Countries to increase the number of scholarship opportunities for low-income countries. This DDF option allows districts to donate an amount to a pooled fund that awards scholarships to students from low-income countries on a world-competitive basis. Each low-income district is invited to submit one candidate for any type of scholarship. All districts are encouraged to donate some amount of DDF to the fund pool to provide at least 32 scholarships annually to candidates from low-income countries. TRF awarded 27 scholarships through the fund pool to scholars from 23 low-income countries for study in 2007-08.

In addition, high-income districts are encouraged to continue donating Ambassadorial Scholarships to low-income countries. Districts donated 12 Ambassadorial Scholarships to other districts or non-Rotary countries for study in 2007-08. Scholarship donations require close communication between the donating and receiving districts and have proven effective in facilitating partnerships for other exchanges and humanitarian programs.

- Scholar orientation — regional seminars for scholars

Outbound and inbound orientation programs are effective tools to ensure that scholars are outstanding ambassadors of goodwill and that a lifelong link with Rotary is established. Scholars are *required* to attend an outbound orientation seminar if their club, district, or region offers one. Orientation seminars should include training on how to develop and make speeches and presentations. If the sponsor district does not offer an orientation session, districts are encouraged to send their scholars to one in another area. Scholars who do not attend orientation seminars made available to them may risk forfeiting their scholarship awards.

Districts are encouraged to send their scholars to outbound and inbound regional orientations to build greater identity and relationships between the scholars and Rotary. TRF provides funds to help support such multidistrict orientation seminars.

- Alumni outreach

Many districts have expressed disappointment that returning scholars do not remain involved with Rotary. On the other hand, many scholars say that Rotary has forgotten them. Sponsor districts should take steps to meet the new program objective — fostering a lifelong association between Rotary and its scholars — through effective alumni outreach efforts. Although many returning scholars will not be in a professional position to join Rotary at that time, keep in contact with them and involve them in Rotary in other ways:

- Invite alumni to assist in club, district, Rotaract, and community and international service projects.
- Involve alumni in orientations for inbound and outbound scholars.
- Encourage clubs to invite alumni to speak at club and district meetings.
- Form a district alumni association.
- If scholar alumni relocate outside their sponsor district, alert the new district to their presence in the area. Provide names of Rotarians and contact information to the alumnus/a in the new Rotary district to encourage him/her to stay connected to Rotary.

- The four elements essential to success in furthering the seven program objectives

1. Selection

- Attract and select candidates who will best represent the ideals of Rotary.
- Educate Rotarians about the purpose of Ambassadorial Scholarships.

- Use such materials as the “Profile of an ideal candidate” and the list of countries in which the Trustees would like more scholars hosted. Encourage selection of candidates whose fields of study will have a strong humanitarian impact, such as
 - Medicine/health care
 - Food production and distribution
 - Urban studies/planning
 - Mental health
 - Nutrition
 - Environmental studies
 - Youth/family values
2. Orientation
- Provide scholars an understanding of the history, goals, and ideals of Rotary.
 - Prepare scholars for their ambassadorial responsibilities before, during, and after the scholarship.
 - Enable Rotarian sponsor counselors to help establish ongoing relationships between the scholar and Rotary.
3. Hosting
- The host counselor and host Rotary club welcomes and helps the scholar fulfill ambassadorial obligations in the host district.
 - The district governor appoints a host club for the inbound scholar, which designates a Rotarian host counselor in the club.
 - The academic and ambassadorial aspects of the scholarship have equal importance, and host counselors will be asked to report to TRF on the success of their inbound scholars in both aspects.
 - Sponsor and host Rotarians should ensure that scholars submit their final reports to TRF one month before their scholarship period ends.
4. Alumni Relations
- Appoint an effective district Rotary Foundation alumni sub-committee chair to maintain the district’s relationship with past Ambassadorial Scholars, some of whom go back as far as the late 1940s.
 - Continue the relationship with the scholar after the scholarship period, ideally by inviting him or her to join Rotary.
 - Provide the scholar opportunities to share experiences with Rotarians, as well as an invitation to make financial gifts to the Foundation to support the next generation of scholars.
 - Celebrate the accomplishments of scholar alumni whom the district has sponsored or who now reside in the district.

Commonly Asked Questions

What scholarships are offered through the SHARE system?

Three scholarship types are available:

Academic-Year Ambassadorial — for one academic year of study abroad

Multi-Year Ambassadorial — for two years of specific degree-oriented study abroad

Cultural Ambassadorial — for three or six months of intensive language training and cultural immersion

Districts can also contribute any amount of DDF in support of the Rotary Centers for International Studies and the Scholarships Fund Pool for Low-Income Countries.

How is scholarship availability determined?

Districts must have DDF available to cover the cost of the scholarships offered. Since applicants must apply through local clubs, the district governor and scholarships subcommittee chair must effectively communicate scholarship availability to the clubs.

Are children of Rotarians eligible to receive a Rotary Foundation Ambassadorial Scholarship?

No. Rotarians, Rotary employees, parents, grandparents, children, grandchildren, stepchildren, and stepgrandchildren (by blood, adopted, or not adopted) of living Rotarians or Rotary employees or their spouses are ineligible for Ambassadorial Scholarships, and remain ineligible for 36 months after resignation from Rotary.

Group Study Exchange

Instituted in 1965, the Group Study Exchange (GSE) program provides grants for teams of outstanding non-Rotarian business and professional persons to travel between paired Rotary districts in different countries. Teams spend four to six weeks studying their host country's institutions, economy, and lifestyles; observing their professions; and discussing ideas with local citizens while developing friendships.

Consider highlighting a successful GSE story in your district newsletter or conference. For tips about how to promote GSE in the media and sample press releases, consult the *GSE News Kit*, available online only at www.rotary.org.

All districts in good standing are eligible to apply for a World Fund Award from the Foundation to send a GSE team every year. Exchanges are carried out in a single Rotary year. Districts may send a maximum of two GSE teams during a given Rotary year. Only one team may be financed through the World Fund, and the other through DDF, a DDF donation from a partner district, or a restricted gift to the Permanent Fund.

- *Team leader eligibility requirements:* The GSE team leader may not be the spouse, lineal descendant, or stepchild (whether adopted or not adopted) of a living immediate past governor, current governor, or governor-elect of the district making the appointment.

PDGs may serve as team leaders only when other qualified candidates are not available, provided

- An open selection process has offered this leadership opportunity to district Rotarians
- Special requirements of the exchange, such as language, vocation, or other needs result in the PDG being chosen as the best qualified candidate
- *Team member eligibility requirements:* Each year, TRF receives communications from Rotarians that the program's objectives are not being fulfilled when districts send team members without a significant amount of time remaining in their careers. Applicants for team membership must be currently employed full-time in any recognized business or profession and be 25-40 years of age, to ensure a long-term impact on a candidate's career development. Team members must not be Rotarians, employees of a Rotary entity, or any living Rotarian's spouse, ancestor, lineal descendant, or the spouse of a lineal descendant. Stepchildren and stepgrandchildren of Rotarians, by marriage, with or without adoption, are also ineligible for GSE team membership.
- *Additional team members:* A standard GSE team consists of four team members and a team leader. Up to two additional non-Rotarian team members may be added to the team through an allocation of *SHARE* DDF (US\$2,000 per team member, or \$1,000 for neighboring country GSE).

Regarding the selection process for GSE team member/leader candidates, Rotarians serving on club or district GSE selection committees must notify the committee of their relationship with any candidate (personal, business, etc.). The committee chair will then determine how to handle the situation, whether to have the person recuse himself/herself from voting on this candidate, etc. All relationships must be declared to the committee.

Sample GSEs

- *Special focus or univocational GSE*

A GSE team from District 1280 (UK) traveled to District 6440 (Illinois, USA) on a univocational exchange. The team of emergency management professionals from England and the Isle of Man included two police officers, a disaster management specialist, and two government workers.

The focus of the team's exchange was vocational and they visited a variety of emergency preparedness organizations and law enforcement facilities. These included local fire departments, police departments, emergency management centers, the FBI's CSI Department, the Department of Emergency Preparedness within a hospital system, and the 911 emergency response dispatch center. The team not only learned about emergency preparedness in the United States, but also taught their hosts about emergency preparedness in the United Kingdom. Through these exchanges, the team indicated that they were able to share within their own various sectors of emergency planning, an opportunity they would not have had without the GSE experience.

- *Cultural GSE*

A team of Native Americans from District 5500 (Arizona, USA) traveled to District 9470 (Western Australia), and a team of Aboriginal team members from Australia visited Arizona to share experiences with their counterparts. By the end of their visits, each team realized that they faced identical social issues such as forced relocation, discrimination, unemployment, and poor health care. The exchange reminded team members of the wealth of contributions indigenous people continue to make to their countries and offered the opportunity to learn from each other how to overcome the social challenges that many minority groups still face in their communities.

- *Traditional Multiprofession GSE*

A GSE team from Zambia (District 9210) visited South Africa (District 9300) in 2006, signifying improved relations between the two countries. “For the first time in southern African Rotary history, a Group Study Exchange has taken place between two formerly conflicting neighboring countries,” said the District 9300 GSE chair. “With the collapse of apartheid in 1994, South Africa and its neighboring countries [have been] able to talk to one another.” The team visited gold and diamond mines, an oil refinery, a steel company, insurance and other businesses, a farm, and several Rotary projects. A team from South Africa visited Zambia in 2007. The neighboring country GSE was made possible through a DDF donation of US\$6,000 from District 9210 to District 9300.

Suggested Discussion Topics

- Finding a GSE partner

Districts should take advantage of every international networking opportunity to establish a GSE partnership. This can include the RI Convention, the International Assembly, Matching Grant or Youth Exchange relationships, or general international travel of your club members. Districts should consider not only areas of the world with which they share commonalities, but also diverse areas they can discover and learn about through GSE. Districts should also consider TRF’s humanitarian objectives and seek pairings that may lead to Matching Grant or World Community Service projects. Each year, approximately 30 Matching Grant projects are created from relationships forged during a GSE partnership.

While many districts may prefer to arrange their own GSE partnerships in advance, about 25 percent of the total districts that apply to send a GSE team in a given year do not have a prearranged partner. TRF usually is able to pair Rotary districts according to the geographical preferences that the DGE indicates on the *GSE District Application* and will consider favorably those partnerships that explore diverse cultures, languages, and regions.

The pool of unpaired districts varies each year, making it impossible to grant every district’s first choice of partner. Districts are encouraged to remain flexible about their geographical preferences and are reminded that as countries like India, Brazil, and the United States are particularly active in GSE, pairings with districts in these countries may occur more frequently.

- Increasing the vocational component of GSE

For most team members, professional relevance is the most important aspect of a GSE. A host itinerary that is strong in vocational days will attract strong team members. Districts must schedule at least five vocational days per team member, tailoring vocational visits to each team member's profession. It is crucial for the sending district to communicate detailed biographical and professional profiles of each team member so that appropriate vocational days can be arranged. Hands-on activities or a day of "shadowing" a professional in his/her job are preferred to tours where team members merely observe a workplace. TRF strictly enforces the submission of a host itinerary by the host district before airline tickets can be released for a visiting GSE team. This ensures that team members have had a chance to review the host itinerary, provide feedback, and ultimately approve the program that they are going to carry out in the host district.

- Finding team members when candidates have difficulty getting time off from work

Districts should consider creative ways of promoting the GSE program to candidates, including use of the local media, networking with Rotaract membership, and promotion in corporate human resource departments (see the GSE News Kit, available online only, for tips about public relations and sample press releases). Consider a special-focus or univocational GSE team. This approach can yield a larger number of candidates because of its focused recruitment criteria and increased professional relevance for potential team members. Teams may consist of one profession (e.g., a group of teachers), or vocations may be diversified within a general field (e.g., a team focused on health care that includes a lab technician, doctor, dentist, and hospital administrator).

There is no better advertisement than word of mouth. Districts should keep in contact with former team members and encourage them to promote the program.

- Promoting exchanges to more diverse geographical areas

Districts should be attentive to their historic participation in GSE. Has your district's GSE team visited Asia recently? Does your district pair with the USA year after year? Attention to diversity is extremely important to successfully fulfilling the GSE program's goals and objectives. Districts should remember there are fewer districts available for partnering in Australia, Europe, and Africa. Flexibility is important.

- Enhancing communication between partner districts

Communication is vital to a successful exchange. As soon as the pairing is confirmed, it is essential that sponsor and host districts be in frequent contact via phone, fax, or e-mail. At least three months before the team's departure, the sponsor district must send team profiles to the host district Rotarians to help them plan effective vocational days. Failure to do so may result in a weak host itinerary that is not suited to the team.

Commonly Asked Questions

My district has not taken advantage of a World Fund Award for GSE in recent years. How much money is now available to my district from the World Fund?

World Fund Awards for GSE do not accumulate from year to year. In other words, if your district has not applied for a World Fund Award in previous Rotary years, funds are NOT carried over for use in subsequent years. Each district may submit an application to TRF to send a GSE team through the World Fund each year.

Which members of the district must the GSE selection committee include?

The district GSE chair should call the meeting at a time when all of the members are able to participate. If participation by all members isn't possible, a proxy can be sent, and selection committee minutes should reflect the reasons for absences and the attendance of all those present. Committee minutes, the interview process, and notes on all team member/leader candidates should be carefully recorded to document a fair and transparent district GSE selection process.

What happens if one or more of the GSE selection committee members cannot attend the committee meeting and/or interviews?

The district GSE chair should call the meeting at a time when all of the members are able to participate. If participation by all members isn't possible, a proxy can be sent, and selection committee minutes should reflect the reasons for absences and the attendance of all those present. Committee minutes, the interview process, and notes on all team member/leader candidates should be carefully recorded to document a fair and transparent district GSE selection process.

My district is geographically dispersed, and we need additional funding for internal travel of the visiting GSE team. Can TRF help?

Subsidies are not available to districts to cover the outbound GSE team's internal travel costs. However, help is available for inbound GSE teams traveling within qualifying host districts. TRF provides special internal travel subsidies of US\$600 for host districts in low-income countries. An additional airfare subsidy of \$2,500 is available for internal flights within multicountry host districts containing one or more low-income countries (costs in excess of \$3,100 must be covered by the host district). Districts that do not qualify for either of these subsidies are recommended to either set aside district funds to support such travel or rotate annually the locations that a GSE team will visit in its district.

How do we respond to an unfavorable GSE experience?

If team members are in danger or have voiced concerns about improper conduct, contact your GSE coordinator at TRF immediately. If the negative experience does not warrant immediate attention, describe in the GSE team's final report the problems that your district faced. Include documentation, if available, to support your comments. Forward this information to your GSE coordinator at TRF, who will further investigate your concerns. Districts can be put on probation or be withheld from participation in the GSE program if it is determined that the problems seriously compromised the integrity of the program.

Who should I contact if there are still questions or concerns?

Contact the GSE Department and ask to be connected with the GSE coordinator for your district. Telephone: 847-866-3330; fax: 847-556-2143; e-mail: gse@rotary.org.

Rotary Grants for University Teachers

The Rotary Grants for University Teachers provide opportunities for current or retired higher-education faculty members to teach at universities in developing countries (other than their own). Grant recipients may be Rotarians, although membership in a Rotary club is not required to apply.

Program Objectives

- Build international understanding while strengthening higher education in low-income countries.
- Promote the exchange of teaching methods and ideas between teachers at grant recipients' home and host institutions.
- Advance development in low-income countries by sponsoring educators to teach subjects of practical benefit to the host country.

Suggested Discussion Topics

- How the Rotary Grants for University Teachers program can reach its full potential

While this program is meeting its objectives, several factors limit its potential for greater success. These include absence of clearly specified and well-publicized teaching needs in host countries, recruiting difficulties in sponsor districts, and a small number of participating sponsor districts. Clubs and districts should recognize that recruiting applicants for Rotary Grants for University Teachers will require a time investment in matching the resources in their district with the needs of districts in low-income countries. Districts interested in sponsoring university teachers are encouraged to develop strong communications and relationships with colleges and universities in their area where qualified candidates may be teaching.

- How clubs can get involved

Clubs get involved by recruiting applicants, providing orientation for outbound teachers, encouraging club members to serve as host advisers for visiting university teachers, and inviting outbound, visiting, and returned university teachers to present club programs and participate in club projects.

Commonly Asked Questions

How can our district award a Rotary Grant for University Teachers?

Through the *SHARE* system by using DDF for a Rotary Grant for University Teacher option.

What grant options are available?

Two options are available in 2009-10: US\$13,000 for 3-5 months of service and \$24,000 for 6-10 months of service.

Are Rotarians or their relatives eligible to receive a Rotary Grant for University Teachers?

While it is TRF's policy that those who contribute to TRF should not also be its beneficiaries, some TRF programs are open to Rotarians. Rotary Grants for University Teachers are available to Rotarians and their relatives because the program is based on offering volunteer service.

Rotary Foundation Alumni

Alumni Relations cultivates the former participants of TRF programs to build programs, mentor, serve, and give back to Rotary.

Goals of Alumni Relations

- Build lifelong ties between TRF program participants and Rotary.
- Ensure that participants feel welcome and of value to Rotary.
- Increase interest in Rotary club membership.
- Provide alumni a way to give back to Rotary through service and financial support.

Samples of Successful TRF Alumni Involvement in Rotary

- Advocates for TRF programs
- Recruiters of program participants
- Participants in orientations
- Advisers to district selection committees
- Speakers at club, district, and other community meetings
- Mentors to current program participants and Interact and Rotaract members
- Participants in service projects
- Hosts to exchange program participants
- Donors to the Annual Programs Fund, Permanent Fund, and Rotary's US\$200 Million Challenge
- District alumni associations

Suggested Discussion Topics

- How can our district involve alumni more fully in TRF programs?
- How can clubs, the district alumni subcommittee chair, and Rotary Foundation alumni coordinators work together to bring more alumni into club activities?
- How can districts and clubs bring alumni closer to membership?
- How can Rotarians approach alumni for contributions?
- Which TRF alumni can be called upon to speak to clubs?
- What are the benefits of having an alumni association in your district?

Commonly Asked Questions

Who are TRF alumni?

The 105,000 people who have received program awards from TRF since 1947. They include Ambassadorial Scholars, Rotary World Peace Fellows, Group Study Exchange team leaders and members, and recipients of Rotary Grants for University Teachers, Volunteer Service Grants, and former Individual Grants, Discovery Grants, New Opportunities Grants, and Grants for Rotary Volunteers

Who are the Rotary Foundation alumni coordinators?

Appointed by The Rotary Foundation Trustees, the 43 Rotary Foundation alumni coordinators serve as a global resource for districts and clubs to help Rotary maintain a lifelong relationship with its alumni. They facilitate alumni participation in district and club programs and activities, and work with TRF staff and alumni to improve alumni presence at Rotary events, such as institutes, regional seminars, and district activities. They also work with other district and zone leaders to encourage alumni membership in Rotary clubs and contributions to TRF.

Fund Development

Why Support The Rotary Foundation?

- 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.

Only with the financial support of Rotarians can this mission of doing good in the world be accomplished.

- The Rotary Foundation belongs to Rotarians.

The Rotary Foundation is the one foundation exclusively dedicated to furthering Rotary's programs throughout the world. Rotarians determine which programs to support and the level of funding provided. It is the dream of every Rotarian to help shape the world's future and make a meaningful difference in the lives of others.

- The Rotary Foundation is among the most respected charities.

The *Chronicle of Philanthropy*, a widely respected publication that reports on nonprofit organizations, consistently ranks The Rotary Foundation as one of the top 400 most successful U.S. charities.

Two Needs, Two Ways of Giving

Description: Two Needs, Two Ways of Giving is TRF's comprehensive fund-raising message. The two needs are to financially support TRF's wide range of programs today and to secure its programs for tomorrow. The two ways of meeting these needs are the Annual Programs Fund and the Permanent Fund.

Two Needs, Two Ways encompasses all forms of giving to TRF, from Rotary Foundation Sustaining Members and Benefactors to Major Donors. Donors who contribute US\$250,000 or more cumulatively are members of the Arch C. Klumph Society and have their portrait hung in the Arch C. Klumph Gallery during a ceremony at RI World Headquarters.

Annual Programs Fund

How to Raise Money for The Rotary Foundation

Promote the Two Needs, Two Ways of Giving fundraising message:

- Promote support for the Annual Programs Fund.
The Every Rotarian, Every Year effort encourages every Rotarian to participate in their Rotary Foundation by volunteering for its programs and contributing to its Annual Programs Fund.
- Make a personal contribution.
Lead by example: make a gift of US\$100 or more each year to the Annual Programs Fund, thereby becoming a Rotary Foundation Sustaining Member.
- Ask others to give.
Ask for contributions of US\$100 or more to the Annual Programs Fund from Every Rotarian, Every Year. Each club should identify a Foundation contact who will personally ask each member of the club for a contribution.
- Ensure that every club sets an Annual Programs Fund goal.
It is vital that all clubs set an Annual Programs Fund goal each year as part of the EREY message. If the club is already at US\$100 per capita or more, encourage the club to set an enhanced goal.
- Encourage all Rotarians to become Rotary Foundation Sustaining Members.
Sustaining Members contribute US\$100 or more every year to the Annual Programs Fund. Rotarians recognize that without sustained support of the Annual Programs Fund, TRF's programs cannot happen.
- Seek challenge Major Gifts.
Use generous contributions from individual donors or available Foundation Recognition Points to help motivate Rotarians in the club or district to contribute to the Annual Programs Fund.
- Organize special events.
 - 8K run/5K walk
 - Foundation dinners
 - Letter-writing campaigns
 - Auctions
- Pursue corporate employee matching gifts.
- Promote TRF-DIRECT Donations.
Consider voluntary monthly, quarterly, or annually recurring contributions through TRF-DIRECT Donations (USA and Canada only).
- Partner with Combined Federal Campaigns (USA only), United Way (USA and Canada).

Commonly Asked Questions

What's the best way to make my contribution to the Annual Programs Fund?

There are four common ways:

- Cash or credit card
- Stocks and mutual funds

- Corporate employee matching funds or corporate gifts
- Electronic fund transfer (contact the RI office serving your area for more information)

Why is it important that every Rotarian gives to the Annual Programs Fund every year?

Annual Programs Fund contributions are spent each year; therefore, the funds continually must be replenished.

What is the Rotary Foundation Sustaining Member program and why is it important?

Rotary Foundation Sustaining Members contribute US\$100 or more every year to the Annual Programs Fund. With a gift of \$100 or more from Every Rotarian, Every Year, TRF can sustain and grow its programs.

Why do we set Annual Programs Fund goals?

Every club and district is expected to establish contribution goals in support of the Annual Programs Fund in order to measure our progress in reaching our overall TRF fundraising goals. Goals should be attainable yet challenging and represent an increase in giving from the previous year.

How are Annual Programs Fund (APF) contributions credited and distributed?

Contributions are credited to the individual donor and his/her club, and applied toward the club's and district's APF goals. Under the *SHARE* system, contributions to the APF are invested for three years before they are spent on TRF programs. Earnings from APF investments help pay for fund development, general administration expenses, and program expenses. At the end of three years, 50 percent of the district's total APF contributions come back to the district in the District Designated Fund for expenditure by the district on TRF programs. Fifty percent of the contributions support the World Fund, which TRF uses to pay for the worldwide programs available to all Rotary districts, regardless of specific contributions (e.g., Group Study Exchange, the matched portion of Matching Grants, etc.).

Do restricted contributions count toward the district APF goal?

No. Restricted contributions such as those to Matching Grants, PolioPlus, and named scholarships are part of the district's total TRF giving. They are not, however, applied to the APF goal and do not count toward the club's or district's per capita giving goals.

Are APF contributions restricted to a specific program?

No. All APF contributions are unrestricted.

Are APF contributions eligible for Paul Harris Fellow Recognition?

Yes. This wearable appreciation is meant to be a tangible "thank you" from TRF for a monetary contribution.

How can we convey to club members the importance of giving to the APF each Rotary year?

It is important that every Rotarian participates in TRF every year through the spirit of volunteerism and voluntary contributions. Convey this message through club bulletins, club and district Foundation seminars, the district as-

sembly, and other district meetings. Educate, involve, and ask Rotarians to support TRF. The district governor's leadership, district Foundation committee's support, club presentations, and monthly newsletter are critical to the success of the Every Rotarian, Every Year effort.

What You as Rotarians Can Accomplish with Your Contribution(s) to the Annual Programs Fund

A US\$100 contribution helps provide

- One full year of education expenses for an underprivileged child in Thailand
- Dental and medical services to approximately 25 low-income individuals living in communities near Mexico City
- Textbooks for a school in Villanueva, Colombia
- An osteoporosis educational program and bone density screenings for six senior citizens in Iowa, USA
- A 10,000-kilowatt electric transformer that powers an agricultural/educational farm operated by a children's orphanage in Mongolia

A US\$500 contribution helps provide

- Corneal transplants to seven young blind persons in Pune, India
- One toilet block benefiting nearly 300 pupils and 11 teachers in a primary school in Holfontein, South Africa
- Furnishings and toys to La Casa, a shelter serving battered women and children in New Mexico, USA
- Computers for the Gayrettepe Rotary Club Grade School in Cumakoy, Turkey
- 15 painters' easels for high school art students to exhibit their work in Ibaraki, Japan

A US\$1,000 contribution helps provide

- Support for an organized community service corps between two cities to clean up a polluted lake in South Korea
- 167 treated mosquito nets to prevent malaria among residents of Lweza, Uganda
- Playground equipment benefiting as many as 60 children in a rural school near San Miguel de Allende, Mexico
- Vocational training equipment to a center housing autistic teens in France
- Deep water wells with hand pumps for villages in Nigeria

A US\$5,000 contribution helps provide

- A water supply to establish a fish farm at an agricultural training center in Zimbabwe that will train 50 people per year
- Vocational training in computer operations, tailoring, knitting, and embroidery to the 50,000 residents of a slum in Delhi, India

- The gift of literacy to 65 adults in rural Guatemala by supplying books and training for 10 instructors
- A mobile eye clinic to screen patients for visual disabilities in India

A US\$10,000 contribution helps provide

- A water and sanitation system, banana trees, poultry production, and roof-top gardens to help people in six Haitian villages
- Cleft lip and palate surgery and rehabilitation for 50 indigent patients in Mexico
- Cataract operations for 200 people in Brazil
- Lifesaving neonatal equipment to a hospital in Argentina
- Three to five months' support for a university professor from the United States to teach sociology in urban Nigeria
- Blood bank equipment to a clinic in India

Permanent Fund

While Annual Programs Fund giving provides the necessary funding to operate TRF's current programs, giving to the Permanent Fund ensures TRF's ability to address the world's greatest needs for generations to come. Gifts to the Permanent Fund are held in perpetuity as part of an endowment. These gifts are professionally invested, and a portion of the Permanent Fund earnings are used each year for purposes specified by the Trustees and the donors.

How to Ensure Gifts to the Permanent Fund Will Grow and Continue to Support TRF

- Ensure that every club sets Benefactor and Bequest Society goals
Each Rotary club is asked to set a Benefactor and Bequest Society goal every year, similar to how it is asked to set an Annual Programs Fund goal.
- Encourage every Rotarian to become a Benefactor
Encourage Rotarians to name The Rotary Foundation as a beneficiary of their will or contribute US\$1,000 or more outright to the Permanent Fund.
- Encourage Rotarians to become Bequest Society members
Bequest Society recognition is extended for bequest commitments worth \$10,000 or more.
- Seek named and endowed gifts
Educate Rotarians on opportunities to establish named funds within the Permanent Fund starting at \$25,000.

Commonly Asked Questions

Why is there a need for a Permanent Fund?

The Permanent Fund was established in 1982 to ensure a strong future for TRF by providing an extra stream of income to meet the increasing demand for TRF's programs and to expand its ability to meet urgent human needs around the world. The Permanent Fund provides Rotarians and other friends of TRF a way to create their own lasting legacy with Rotary.

Does TRF encourage bequest gifts?

Just as every Rotarian is asked to make an annual gift to the Annual Programs Fund, every Rotarian is encouraged to make a commitment to the Permanent Fund through a bequest. (See *Two Needs, Two Ways of Giving* [173].)

What are the ways to give to the Permanent Fund?

Testamentary gifts through a will or other estate plan, life income gifts (e.g., charitable remainder trusts, charitable gift annuities, pooled income fund), or outright gifts of property, cash, or other assets

Are there ways to earmark gifts for a special purpose?

Donors may establish named funds within the Permanent Fund with gifts of US\$25,000 or more. The donor or his or her designated representative will receive an annual update on the named fund.

What targets have been established for the Permanent Fund?

The Permanent Fund initiative identified an eventual US\$1 billion dream and set a short-term goal of raising \$200 million by 2005. That goal was reached in 1999 — six years ahead of the target date. In October 2001, a new short-term goal was established for 30 June 2005, of \$500 million in market value and commitments. That goal was reached in September 2006. The present goal is \$1 billion by 2025.

Are all the earnings of Permanent Fund gifts spent?

No. Each year the Trustees review the spending policy to ensure that the real value of the Permanent Fund grows over time and that the annual spending rate does not exceed the expected long-term rate of return less the expected rate of inflation. For more detail, please see the Permanent Fund Financial Report at www.rotary.org.

Major Gifts

Major gifts are at least US\$10,000 and can be made to the Annual Programs Fund, Permanent Fund, or a restricted TRF program.

Major gifts to the Annual Programs Fund are spent in full (e.g., challenge major gifts). An example of a major gift restricted to a TRF program is a named Ambassadorial Scholarship to fund one scholar for one year of study.

Major gifts to the Permanent Fund provide program support in perpetuity. Donors may establish named funds at the following levels:

- \$25,000 — Establishes a named fund within the Permanent Fund. The spending portion of the gift can be applied at the Trustees' discretion (World Fund) or through *SHARE* (District Designated Fund and World Fund).
- \$50,000 — The spending portion may be directed to a TRF program (e.g., Educational Programs or Humanitarian Grants).
- \$150,000 — Minimum gift necessary to direct the spending portion to a project within an approved TRF program (e.g., an Academic-Year Ambassadorial Scholarship or Group Study Exchange for a specific Rotary district).

Commonly Asked Questions

What is a Major Donor recognition event?

Districts and clubs should encourage public presentation of Major Donor crystals and pins and/or Bequest Society crystals and pins at large district/club events to recognize new donors and motivate future donors. The event could be a dinner, lunch, breakfast, or cocktail reception.

How does TRF raise major gifts?

District governors and district governors-elect appoint district Permanent Fund chairs throughout the United States and Canada to serve two-year terms. The district Permanent Fund committee's primary responsibility is to identify Rotarians who could make major gifts, cultivate their interest in TRF, and assist them in completing such gifts. (Though the Permanent Fund Initiative was originally established to raise major gifts to the Permanent Fund, they may also be made to the Annual Programs Fund.)

I know a Rotarian widow whose spouse was a strong supporter of TRF.

What should I do?

Alert your district Permanent Fund committee chair to ensure that the widow is invited to participate in local events, cultivated as a potential donor, and, if appropriate, solicited for a gift. You may also want to notify the appropriate TRF staff member at plannedgiving@rotary.org, who may further assist you.

What kinds of gifts is TRF prepared to accept?

TRF routinely accepts gifts of cash, publicly traded securities, closely held stock, banking instruments, real estate, life insurance, and tangible personal property. TRF offers life income gifts to donors who are interested in supporting TRF today and continue to receive income from the assets they contribute. Unusual or complex gifts are reviewed by TRF's Gift Acceptance Committee before acceptance. A gift acceptance policy is available at www.rotary.org.

Be a Resource for Your District

- Establish a Foundation speakers' bureau in your district.
- Call upon key zone and district leaders, past Rotary Scholars and GSE participants, and TRF staff to further your message of support for TRF.
- Encourage Rotarians to visit RI's Web site, www.rotary.org, often.
- Contact Publications Order Services (phone: 847-866-4600, fax: 847-866-3276; e-mail: shop.rotary@rotary.org) or go to shop.rotary.org to order publications and other materials.
- Share personal stories of how TRF has improved lives around the world.

Development Services: Recognition and Reports

Development Services in TRF tracks contributions to TRF and recognition for them.

Suggested Discussion Topics

- The Dual Role of Recognition
 - Thanks individuals for their contributions to TRF
 - Promotes TRF and encourages others to make contributions
- Forms of Donor Recognition
 1. Rotary Foundation Sustaining Member (gifts of US\$100 or more per year)
 2. Paul Harris Fellow (\$1,000 or equivalent)
 3. Multiple Paul Harris Fellow (additional \$1,000-\$9,000 beyond the initial Paul Harris Fellow level)
 4. Benefactor (provision in estate plan or outright gift of \$1,000 to the Permanent Fund)
 5. Major Donor (six levels of recognition beginning with \$10,000 in personal outright or cumulative giving to TRF)
 6. The Rotary Foundation Bequest Society (six levels of recognition for bequests beginning at \$10,000 or more)

Multiple Paul Harris Fellow Recognition

When a Paul Harris Fellow makes an additional US\$1,000 contribution to the Annual Programs Fund, he/she will receive, upon request, a Paul Harris Fellow pin with one sapphire. Each additional contribution in \$1,000 increments to \$6,999 to TRF (Annual Programs Fund, Matching Grants) entitles the donor to receive an additional sapphire pin up to a maximum of five sapphires. Incremental \$1,000 contributions of \$7,000 to \$9,999 entitle the donor to receive the equivalent pin with up to three rubies. Currently, Multiple Paul Harris Fellows may also designate another person as a Paul Harris Fellow with each \$1,000 contribution.

PHF*/RFSM** Amount (in US\$)	Pin Multiple PHF is Eligible to Wear
2,000 to 2,999.99	one sapphire
3,000 to 3,999.99	two sapphires
4,000 to 4,999.99	three sapphires
5,000 to 5,999.99	four sapphires
6,000 to 6,999.99	five sapphires
7,000 to 7,999.99	one ruby
8,000 to 8,999.99	two rubies
9,000 to 9,999.99	three rubies

*Paul Harris Fellow/**Rotary Foundation Sustaining Member

Contributions to the following programs qualify for Paul Harris Fellow Recognition: Annual Programs Fund, approved Matching Grants (sponsor portion), PolioPlus, World Fund. Contributions to the Permanent Fund qualify for Benefactor Recognition.

- Forms of Club Banner Recognition
 1. 100% Paul Harris Fellow Club (every active member of the club is a Paul Harris Fellow)
 2. 100% Rotary Foundation Sustaining Member Club (every active club member personally contributes US\$100 or more to the Annual Programs Fund per year)
 3. Every Rotarian, Every Year Club (club has per capita giving of \$100 or more per year, with every active member personally contributing some amount to the Annual Programs Fund per year)
 4. Top Three Per Capita Giving Clubs in the District (qualifying clubs must have minimum \$50 per capita giving for the year)

The Two Primary Contribution Reports

- Monthly Contribution Reports
 - *Audience:* District governors, district governors-elect, Foundation chairs, annual giving chairs, club presidents, club secretaries.
 - *Frequency:* Available 24 hours a day, seven days a week, through the Member Access feature at www.rotary.org. (Club and district officers must register.)

- *Content:* Club-by-club monthly and year-to-date contributions to the Annual Programs Fund; year-to-date contributions for restricted and Permanent Fund giving; club-by-club Annual Programs Fund per capita giving statistics; rankings of the top three clubs; district progress toward general giving goal and *SHARE* program participation; and two new columns that include each club's Annual Programs Fund goal amount and percent of the goal achieved. In addition, the *SHARE* summary page at the end of the Monthly Club Report shows the \$100 per capita district benchmark, based on membership figures from the July Semiannual Report and district combined club goals and annual giving goals.
- Club Recognition Summary
 - *Audience:* District governors, district governors-elect, Foundation chairs, annual giving chairs, club presidents, club secretaries, and Internet communications officers
 - *Frequency:* Available 24 hours a day, seven days a week, through the Member Access feature at www.rotary.org. (Club and district officers must register.)
 - *Content:* The club's Paul Harris Fellows; list of club's current and last year's Rotary Foundation Sustaining Members; Multiple Paul Harris Fellows, and Benefactors. Allows clubs and districts to monitor the accuracy of recognition records.
 - *Also includes:* Foundation Recognition Points that may be used to name Paul Harris Fellows.

The *SHARE* System

SHARE allows districts a voice in how contributions are spent and enables districts to participate in TRF's programs that are of most interest to them. Through *SHARE*, all district Annual Programs Fund giving is totaled at the end of the contribution year and divided into two funds. Fifty percent of each district's annual giving is credited to the District Designated Fund (DDF). Each district is given an opportunity to use its DDF to fund TRF programs in which it chooses to participate. The other 50 percent is credited to the World Fund, which pays for the programs that every district may apply for regardless of contribution level, such as Group Study Exchange (available to districts every year), 3-H grants, Matching Grants, Volunteer Service Grants, and any new pilot programs.

Suggested Discussion Topics

- Why the system is called *SHARE*
 - Rotarians *SHARE* their resources with fellow Rotarians; Trustees *SHARE* the decision-making with the districts; and Rotarians *SHARE* Rotary with the world through their Foundation.
- The district *SHARE* process
 1. In January, the district Foundation chair receives a *SHARE* Kit, including a *SHARE* Report and *SHARE* Planning Worksheet.

2. The district then polls the Rotarians in the district to determine which program options are of the most interest by
 - Sending a questionnaire to clubs
 - Inviting comment through the district newsletter
 - Requesting a response during official club visits
3. After receiving information from the clubs, the district Rotary Foundation committee and district governor decide how to use the district's DDF. When the district sends in its grant requests, such as for District Simplified Grants, Matching Grants, Ambassadorial Scholarships, and donation to the Rotary Centers for International Studies, TRF deducts those amounts from the district's *SHARE* account when the Trustees approve the grant request or when the donation is made.
4. Districts must submit their scholarships donations to TRF by 1 March to allow the receiving districts time to incorporate the donation into their plans. (For example, if a district donates a scholarship, the receiving district needs the time to advertise the scholarship and select the scholar.)

Commonly Asked Questions

In what year will contributions made in Rotary year 2009-10 be available to be spent for TRF programs?

In 2012-13. TRF invests contributions for three years before they are spent. The investment return helps pay for TRF administration and fund development costs.

What happens to DDF that is available but not used?

Unused DDF is carried over for use in a future year. However, districts are encouraged to use as much DDF as possible to make it available for programs in the first program year it becomes eligible.

A Rotarian in the district gave a US\$10,000 gift to the Permanent Fund. Why is this not reflected in the district's DDF balance?

Permanent Fund and other restricted gifts do not count toward *SHARE* totals because the donor has indicated in advance the use of the funds. Fifty percent of general earnings from Permanent Fund gifts will be credited to the donor district's DDF, if so requested by the donor at the time the donation is made.

A district has an insufficient DDF balance for the scholarship option it wants. Can it contribute the funds needed for that option by borrowing ahead from next year's DDF to make the selection?

No. All contributions must go through the three-year contribution cycle.

In prior years, districts made allocations to specific types and numbers of scholarships. Now that the district no longer allocates funds ahead of time, how will TRF know what scholarships each district is offering?

The district must keep track of its DDF decisions. TRF will deduct funds from DDF when the scholarship application is approved.

Rotary Foundation Finances

Financial Reporting

TRF uses a U.S. financial reporting standard that requires not-for-profit organizations to classify assets, revenues, and expenses into the following three categories of net assets:

- *Unrestricted* — Net assets that are free of donor-imposed restrictions. These primarily consist of gifts to the Annual Programs Fund. In addition, all revenues, expenses, gains, and losses pertaining to all investment funds (Annual Programs Fund, Permanent Fund, and PolioPlus Fund) are classified as increases to unrestricted net assets.
- *Temporarily Restricted* — Net assets whose use by TRF is limited by donor-imposed restrictions that either expire with the passage of time or can be removed by fulfillment of the stipulated purpose for which the donation was restricted. The PolioPlus Fund has been classified as temporarily restricted. This fund receives revenue from voluntary contributions and government grants that are restricted to program awards. The Trustees have designated the fund's earnings, which are classified as an increase in unrestricted net assets, for PolioPlus program awards and their administration.
- *Permanently Restricted* — Net assets donated with stipulations that they be invested to provide a permanent source of income (e.g., endowed funds). Such restrictions neither expire with the passage of time nor are removed by fulfillment of a stipulated purpose. The Permanent Fund has been classified as permanently restricted. This fund receives contributions that specify only the spending portion earnings of the fund may be spent in support of TRF programs. These earnings are classified as an increase in unrestricted net assets.

Complete financial details are available in *The Rotary International and Rotary Foundation Annual Report* (187).

Future Vision Plan

In anticipation of The Rotary Foundation's 100-year anniversary in 2017, the Trustees set out to develop a 10-year vision with a three-year plan to move the Foundation towards its next century of service. This vision and plan reflect input from a wide variety of Rotarians through interviews, surveys, focus groups, and input sessions and include a comprehensive approach for setting goals for a successful implementation.

The Future Vision Plan is designed to

- Simplify Foundation programs and processes consistent with the mission
- Focus Rotarian service efforts where they will have the greatest impact by addressing priority world needs that are relevant to Rotarians
- Offer program options to help achieve both global and local goals
- Increase the sense of ownership at the district and club levels by transferring more decisions to the districts
- Gain greater understanding of The Rotary Foundation's work and enhance Rotary's public image

Grants Structure

Under the new grants structure model, The Rotary Foundation (TRF) will provide two types of grants:

- **Rotary Foundation District Grants** allow clubs and districts to support their specific service interests and address immediate needs in their communities and abroad. These are block grants to districts, modeled after the current District Simplified Grants program. Districts will be able to use up to 50 percent of their District Designated Fund (DDF) to support these grants.

District grants will be funded by a percentage of DDF provided as a block grant. During the three-year pilot, districts may use up to 50 percent of their available DDF to support smaller local and international projects and broadened activities.

- **Rotary Foundation Global Grants** offer opportunities to participate in more strategically focused, sustainable activities with greater support from TRF. These grants will fund larger projects with sustainable, high-impact outcomes in one of six areas of focus corresponding to TRF's mission:
 - Peace and conflict prevention/resolution
 - Disease prevention and treatment
 - Water and sanitation
 - Maternal and child health
 - Basic education and literacy
 - Economic and community development

Clubs and districts can either create their own global grant projects in the areas of focus or sponsor packaged grants developed by TRF in conjunction with its strategic partners.

Global grants will provide a World Fund match for club- and district-designed educational and humanitarian grant projects; package grant projects will be funded through a competitive process by the World Fund, Foundation earned income, and contributions from strategic partners.

Designed to achieve the most effective and strategic use of TRF resources in reaching sustainable outcomes, the package grant projects will not require club and district financial support.

Strategic Partnerships

TRF will form strategic partnerships with organizations that specialize in one of the strategic areas of focus. These organizations would provide financial support, technical expertise, and/or advocacy efforts in projects and activities that are designed jointly with TRF and include Rotarian participation. In addition to increasing the impact of TRF grants, these relationships will offer opportunities to achieve greater recognition of Rotary's work.

Implementation

The Future Vision Plan will be implemented in stages. In 2008-09, the Trustees selected approximately 100 districts to participate in a pilot that will run until 2010-13. In selecting the pilot participants, the Trustees will attempt to compose a representative group in terms of location, size, effectiveness, and level of involvement with TRF. The remaining districts will continue to use the current programs and grants processes until global implementation of the new grant structure in 2013. The Future Vision pilot will have the following timeline:

- 2010-11: Begin awarding grants to pilot districts. Approximately 100 districts will participate in the three-year pilot.

- 2011-12: Continue awarding grants to pilot districts. Begin to phase out current TRF programs.
- 2012-13: Continue awarding grants to pilot districts. Begin to adjust the grant model based on pilot districts' feedback. Qualify and train all districts.
- 2013-14: Begin awarding new grants worldwide and phase out remaining TRF programs.

For questions about the Future Vision Plan,
e-mail newgrantspilot@rotary.org or
go to www.rotary.org/futurevision.



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