

THE ROTARY FOUNDATION

3 TYPES OF CONTRIBUTIONS

(1)

ANNUAL PROGRAM FUND

(Counts towards District Annual Giving and Annual Giving Per Capita)

(2)

RESTRICTED GIVING

(Does not count towards District Annual Giving Goal or Annual Giving Per Capita)

(3)

PERMANENT FUND

Paul Harris Fellow Recognitions by Clubs

All contributions support **SHARE**

50% Goes to District Designated Funds (DDF)

50% Goes to World Fund

Contributions are available for Programs after 3 years

Paul Harris Fellow Sponsorship by individuals

Supports Programs Selected by **Donors**

i.e. Matching Grants

Polio Plus

Polio Plus Partners

World Fund

Other Approved Programs

Benefactors and Bequests

Contributions are never spent

Interest **ONLY** spent on Programs

Donors can designate earnings for;

Share

World Fund

Others (Major gifts ONLY)

The Endowment Fund for Rotary was first introduced by Arch Klumph in 1917. In 1928 it was renamed the Rotary Foundation. It is governed by 13 member Board of Trustees. The Foundation is the charity arm of Rotary. A good way in which to remember this, is to consider Rotary International like the “*Club Account*” and the Rotary Foundation the “*Project Account*”.

Through the Rotary Foundation, Rotary is able to achieve its many Educational Programs by sponsoring such things as Group Study Exchange and Ambassadorial Scholars and Humanitarian Programs such as Polio Plus and the many different Grants.

For more information about the Rotary Foundation, contact the Foundation District Chairman.

AN OVERVIEW OF THE ROTARY FOUNDATION

In 1917 Arch Klumph, the sixth President of Rotary International, suggested the idea of an **Endowment Fund**. In 1928 this fund was renamed **The Rotary Foundation**. The Foundation is a separate corporation to its parent body, Rotary International. The aim of the Foundation's administration is to help improve international understanding and better friendships through its educational programs, at the same time foster humanitarian programs that will help better the living standards in developing countries.

All funds raised in Australia for the Foundation remain in Australia. Australia has a short-fall every year. This means we are not paying our way when it comes to our Foundation responsibilities.

The Share System through the Annual Giving & World Fund Programs:

It is every Rotarians responsibility to participate in the Foundation by contributing financially as they see fit. To enable Districts to participate in the Foundation to the full extent possible, the Trustees developed the *SHARE* system for the allocation of funds.

All District Annual Programs Fund giving is divided into two categories. With 50% of the Annual Programs Fund giving going to the District's Designated fund (DDF) and 50% to the World Fund. The DDF is for District Programs and the interest from the World Fund pays for other Foundation Programs such as the Group Study Exchange, 3-H Grants, Matching Grants, Grants for Rotary Volunteers, Peace Programs, Carl Miller Grants, Ambassadorial Scholarships and any other new pilot programs.

Each November, our District Governor is advised of the total amount available in our DDF for distribution in three years. At the end of the three years, 50% of the Annual Program Fund will be returned through the DDF and 50% will remain in the World Fund through the *SHARE* system.

Restrictive Giving:

The third area that makes up the structure of the Rotary Foundation, is called Restrictive Giving. The donor is able to nominate how the money should be spent. i.e. Matching Grants, Polio Plus, World Fund etc.

The Rotary Foundation Trustees:

The Foundation is governed by a 13 member Board appointed by the President of RI and approved by the RI Board of Directors. Four of the Trustees are Past Presidents of RI. Each Trustee serves a four year term. *Foundation Month is November.*

The Rotary Foundation's Annual Giving efforts have four primary objectives:

- Promote the Foundation's many successes to Rotarians and others
- Encourage every Rotarian to make an annual contribution
- Educate Rotarians on the Foundation's operations
- Motivate Rotarians to participate in Club and District-sponsored Foundation Programs

Rotary Club's Responsibility to the Rotary Foundation:

Generally, people only support and become involved in worthwhile activities about which they are knowledgeable and can appreciate. Therefore, it is very important that a Rotary Club has a strong Foundation Committee to foster the idea of commitment to the Foundation.

Ways in which Rotarians and Clubs can Participate

Paul Harris Recognition:

The presentation of a Paul Harris Fellow Recognition is one very successful way for Clubs to contribute to the Foundation. All Clubs are encouraged to present a PHF recognition annually. Clubs can put funds aside from each week's meeting. The cost of a PHF Recognition is \$1,000 USA.

Sustaining Member:

A Sustaining Member is a person who makes a minimum initial gift of US\$100 or more to the Annual Program Fund and states in writing the intention to do so annually.

Benefactor Recognition:

A Benefactor is a person who informs the Foundation in writing that they have made provision in their Will naming the Rotary Foundation's Permanent Fund as a beneficiary; or anyone who makes an outright gift of US\$1000 or more to the Permanent Fund. The insignia of two ribbons are present to that person who may wear them with a PHF badge or other Rotary pin.

Bequests:

Cash or property may be left to the Rotary Foundation through a Will. This is one of the major means of support to the Foundation.

For further information on Annual Giving contact your District Foundation Chairman.
The Rotary Foundation's Educational Programs

Two of the most popular and well known educational programs within the Rotary Foundation are, the Ambassadorial Scholarships and the Group Study Exchange.

Ambassadorial Scholarship

Started in 1947. Scholars are given the opportunity to study at a university in another country.

Group Study Exchange

Started in 1965 with the first exchange between California and Japan. Almost 40,000 business and professional men and women between the age of 25 and 40 years have made up almost 7000 exchange teams around the world. Teams of four or five non-rotarians travel with a Rotarian Team Leader to another country for four to six weeks.

Alumni of the Foundation:

They are Past Ambassadorial Scholars, Past Group Study Exchange Team Members and Leaders, Rotary Volunteers, Carl P Miller Discovery Grant Awardees and Past recipients of University Grants.

Humanitarian Programs of the Rotary Foundation

PolioPlus:

In 1981 a special New Horizon's Committee considered the fact that only 20% of the children in developing countries were immunized against common diseases. In 1982 they provided a five year supply of Polio vaccine to any developing country upon request. It was Rotary's desire to help eliminate Polio from the world by the year 2000 with official certification in 2005 – Rotary's 100th Anniversary. Polio immunization programs were administered through the 3-H Programs. With 100 million babies born annually in developing countries, it was calculated that \$120 million would be needed to provide vaccine for a five year program throughout the world.

Carl P Miller Discovery Grants:

As a result of a one million dollar bequest from Carl Miller and his wife, this program is available to help cover travel and related expenses to carry out planning for an International Service Project.

Grant for Rotary Volunteers:

Assistance to Rotarians for 4 to 6 weeks on an International Project.

Health, Hunger and Humanity Grants (3-H):

To fund long term projects which are too large for one Club or District to manage.

Matching Grants:

To assist Clubs and Districts carry out International Service Projects in co-operation with Rotarians in another country.

Helping Grants:

Similar to Matching Grants, however, significant participation by local Rotarians is either limited or impossible.

Rotary Peace Program Grants:

This program is designed to support conference and other activities which promote co-operation, goodwill and develop a peaceful understanding among people. It also promotes economic and human development.