

THE ROTARY FOUNDATION  
**REFERENCE  
GUIDE**

the 1990s, the number of people who have been employed in the service sector has increased in all countries. The increase has been particularly large in the United States, where the service sector has become the dominant sector of the economy.

The increase in the service sector has been driven by a number of factors. One of the main factors is the increasing demand for services. As people's incomes rise, they tend to spend more on services such as education, health care, and entertainment. Another factor is the increasing importance of services in the production process. Many goods are now produced using services, such as transportation and communication.

The increase in the service sector has also led to a change in the way that services are produced. In the past, many services were produced by small, independent businesses. However, in recent years, there has been a trend towards larger, more integrated service providers. This is particularly true in the case of transportation and communication services.

The increase in the service sector has also led to a change in the way that services are consumed. In the past, many services were consumed in person. However, in recent years, there has been a trend towards consuming services remotely. This is particularly true in the case of education and health care services.

The increase in the service sector has also led to a change in the way that services are financed. In the past, many services were financed through government subsidies. However, in recent years, there has been a trend towards financing services through private investment. This is particularly true in the case of transportation and communication services.

The increase in the service sector has also led to a change in the way that services are regulated. In the past, many services were regulated through government intervention. However, in recent years, there has been a trend towards deregulation of services. This is particularly true in the case of transportation and communication services.

The increase in the service sector has also led to a change in the way that services are marketed. In the past, many services were marketed through traditional advertising methods. However, in recent years, there has been a trend towards using digital marketing methods. This is particularly true in the case of education and health care services.

The increase in the service sector has also led to a change in the way that services are distributed. In the past, many services were distributed through physical channels. However, in recent years, there has been a trend towards using digital distribution channels. This is particularly true in the case of education and health care services.

The increase in the service sector has also led to a change in the way that services are evaluated. In the past, many services were evaluated through traditional evaluation methods. However, in recent years, there has been a trend towards using digital evaluation methods. This is particularly true in the case of education and health care services.

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All figures are in U.S. dollars.

# THE ROTARY FOUNDATION

The mission of The Rotary Foundation is to enable Rotary members to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty. The Foundation is a not-for-profit corporation supported solely by voluntary contributions from Rotary members and friends of the Foundation who share its vision of a better world. This support is essential to make possible projects, funded with Foundation grants, that bring sustainable improvement to communities in need.



# POLIOPLUS

Polio eradication is Rotary's top philanthropic priority. When Rotary launched the PolioPlus program in 1985, there were more than 350,000 polio cases in over 125 countries. Since 1988, when Rotary began working with its partners in the Global Polio Eradication Initiative to immunize more than 2.5 billion children, the incidence of polio has decreased 99.9 percent. As of 2015, Rotary's contributions to the global polio eradication effort totaled \$1.5 billion.

## POLIOPLUS GRANTS

**Purpose** PolioPlus grants support global eradication efforts in polio-endemic countries and those that have imported the disease or are at high risk for it. Activities include conducting National Immunization Days and monitoring poliovirus transmission.

**Funding** PolioPlus grants are funded from the general PolioPlus Fund and District Designated Fund contributions.

**Application** Proposals are submitted primarily by major partner agencies, such as the World Health Organization or UNICEF, or national PolioPlus committee chairs (listed in the Official Directory).

**Decision** Trustees approve PolioPlus grants at regularly scheduled meetings.

## POLIOPLUS PARTNERS GRANTS

**Purpose** PolioPlus Partners grants support urgent social mobilization and surveillance projects submitted by Rotary members in polio-endemic countries and those that have imported the disease or are at high risk for it.

**Funding** PolioPlus Partners grants are funded from the general PolioPlus Fund.

**Application** Grant applications are accepted only from national PolioPlus committee chairs in priority countries.

**Decision** Grants are approved on a rolling basis.

## **POLIOPLUS RESOURCES**

- **End Polio Now:** Newsletter with updates and news about polio eradication efforts, published every other month
- **End Polio Now video and digital resources (942-USB):** USB drive loaded with polio-focused materials, including the new End Polio Now video, End Polio Now logo, polio images, and broadcast-quality PSAs
- **End Polio Now poster (941-EN):** Describes Rotary’s commitment to eradicating polio and encourages support
- **End Polio Now pins (988-MUP):** Lapel pins with the End Polio Now logo
- **End Polio Now advocacy flier (943-EN):** Four-page flier with the top five reasons to eradicate polio and four ways to take action
- **End Polio Now – Make History Today:** Infographics that explain the Bill & Melinda Gates Foundation’s 2-for-1 fundraising agreement with Rotary
- [www.endpolionow.org](http://www.endpolionow.org)

For ordering information, see page 28.

# ROTARY PEACE FELLOWSHIPS

**Purpose** Rotary Peace Fellowships enable individuals to pursue a graduate degree in international relations, peace, conflict resolution, and related subjects, or a professional development certificate in peace and conflict studies at one of the six Rotary Peace Centers.

**Funding** Fellowships cover transportation, tuition, qualified internships, room and board, and other limited expenses for the duration of the program. Fellowships are supported through a pool of funds contributed by districts from their District Designated Fund, through term gifts, Rotary's Endowment Fund, and the World Fund.

**Application** District submits a Rotary Peace Fellowship Application.

**Deadlines** District can submit an unlimited number of qualified applications at no cost by 1 July for world-competitive selection. Applicants must submit their applications to their district by 31 May, which gives the district time to review the application, interview the applicant, and submit the endorsement forms to The Rotary Foundation.

**Criteria** A candidate should have:

- A bachelor's degree or equivalent for a master's degree program, a strong academic background for a professional certificate program
- Work or service experience in relevant fields
- English proficiency for both programs, and knowledge of a second language for master's degree
- A demonstrated commitment to peace and international understanding

## Decision

Up to 50 master's degree and 50 professional development certificate fellows are selected annually. Trustee-approved applicants are notified by 15 November.

## Ineligibility

The following are not eligible for fellowships: Rotarians; employees of a club, district, or other Rotary entity, including Rotary International; spouses, lineal descendants (children or grandchildren by blood, legal adoption, or marriage without adoption), spouses of lineal descendants, or ancestors (parent or grandparent by blood) of any living person in the foregoing categories. However, such individuals are eligible to apply for the short-term professional development program at Chulalongkorn University in Bangkok and, if selected, are responsible for paying all tuition and fees associated with their participation.

## ROTARY PEACE FELLOWSHIPS RESOURCES

- **Peace in Action:** Newsletter with updates and news about Rotary Peace Fellowships, published every other month
- **Rotary Peace Centers Fellowships brochure (084-EN):** General information about the program and fellowships for potential candidates
- **Peace Is Possible brochure (850-EN):** Overview of the Rotary Peace Centers and available naming opportunities
- **Rotary Peace Centers pins (089-MUP):** Lapel pins with dove and Rotary logo
- **[www.rotary.org/peace-fellowships](http://www.rotary.org/peace-fellowships)**

For ordering information, see page 28.



# GRANTS

Rotary Foundation grants support Rotarians' efforts to change lives and serve communities.

## DISTRICT GRANTS

District grants are block grants available annually that enable clubs and districts to address immediate needs in their communities and abroad. Districts may request up to 50 percent of their District Designated Fund for one grant annually (see Annual Fund-SHARE on page 13). Districts manage and disburse these funds to support district- and club-sponsored activities, including vocational training teams, scholarships, humanitarian service projects, and cultural exchanges that align with the Foundation's mission.

## GLOBAL GRANTS

Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale, international humanitarian projects, vocational training teams, and graduate and postgraduate scholarships that have sustainable, measurable outcomes in one or more of Rotary's areas of focus (see pages 6-7). Activities may be carried out individually or in combination — for example, one grant may support a vocational training team and a related humanitarian project.

Global grant projects must have a minimum total budget of \$30,000. This includes the World Fund award (minimum \$15,000 and maximum \$200,000), which is based on a 100 percent match of District Designated Fund allocations or a 50 percent match of cash contributions from the sponsors.\* All global grants must be sponsored by two clubs or districts: a host sponsor in the country where the activity takes place and an international sponsor outside that country.

When planning a global grant project, sponsors should conduct a thorough [needs assessment](#) that explores the pressing concerns in the project location as well as the club and community resources available to address them.

\*On 1 July 2015, [The Rotary Foundation's funding model](#) went into effect. Global grant sponsors must now contribute an additional 5 percent for any cash contributions to The Rotary Foundation.

## AREAS OF FOCUS

All projects, scholars, and vocational training teams funded by global grants work toward specific goals in one or more of the Foundation's six areas of focus:

### Peace and conflict prevention/resolution

- Training leaders, including potential youth leaders, to prevent and mediate conflict
- Supporting peacebuilding in communities and regions affected by conflict
- Supporting studies for career-minded professionals related to peace and conflict prevention/resolution

### Disease prevention and treatment

- Improving the capacity of local health care professionals
- Promoting disease prevention programs, with the goal of limiting the spread of communicable diseases and reducing the incidences of and complications from noncommunicable diseases
- Enhancing the health infrastructure of local communities
- Educating and mobilizing communities to help prevent the spread of major diseases
- Preventing physical disability resulting from disease or injury
- Supporting studies for career-minded professionals related to disease prevention and treatment

### Water and sanitation

- Providing equitable community access to safe water, improved sanitation, and hygiene
- Strengthening the ability of communities to develop, fund, and maintain sustainable water and sanitation systems
- Supporting programs that enhance community awareness of the benefits of safe water, sanitation, and hygiene
- Supporting studies for career-minded professionals related to water and sanitation

## Maternal and child health

- Reducing the mortality and morbidity rate for children under age of five
- Reducing the maternal mortality and morbidity rate
- Improving access to essential medical services, trained community health leaders, and health care providers for mothers and children
- Supporting studies for career-minded professionals related to maternal and child health

## Basic education and literacy

- Involving the community to support programs that strengthen the capacity of communities to provide basic education and literacy to all
- Increasing adult literacy in communities
- Working to reduce gender disparity in education
- Supporting studies for career-minded professionals related to basic education and literacy

## Economic and community development

- Building the capacity of entrepreneurs, community leaders, local organizations, and community networks to support economic development in impoverished communities
- Developing opportunities for productive work
- Reducing poverty in underserved communities
- Supporting studies for career-minded professionals related to economic and community development

## SUSTAINABILITY

Sustainability means different things to different organizations. For The Rotary Foundation, sustainability means providing solutions to community needs in such a way that the benefiting community can maintain the activities after grant funding ends. Global grant projects must be sustainable and display the following characteristics:

- **Community needs** — The host community and Rotary project sponsors develop projects based on the community's assessment of its needs and strengths.
- **Appropriate technology** — Project materials are appropriate for the community and, ideally, are purchased locally.

- **Sustainable funding** — The community is able to sustain the project without ongoing financial support from The Rotary Foundation or other Rotary sources.
- **Knowledge transfer** — The project includes teaching beneficiaries how to address their ongoing needs after the project is completed.
- **Motivation** — The community is able to assume ownership of the project upon its completion.
- **Monitoring and evaluation** — The project includes a measurement plan to confirm significant improvement over time.

## SCHOLARSHIPS

Scholarships can be funded by district grants and global grants. District grants have no restrictions on the educational level of the scholarship (e.g., undergraduate/bachelor's or graduate), duration of the program, or field of study. Districts may develop their own criteria for selecting scholars, determine the monetary amount of the awards, and support students attending local universities, as there is no international requirement.

Global grants support international graduate-level study related to an area of focus for one to four years.

Today's scholars are tomorrow's leaders within the areas of focus.

## VOCATIONAL TRAINING TEAMS

Vocational training teams can be supported by district grants and global grants. Teams sponsored by district grants have flexibility on participant age and the duration or focus of the exchange.

Global grants address humanitarian needs by supporting teams that travel abroad to provide or receive training in one or more areas of focus. At least one team leader, preferably a Rotarian, and two members are required per team. There is no maximum team size or age restriction, but all team participants should have relevant professional skills and experience.

Teams sponsored by global grants may provide or receive training in various settings, including universities, hospitals, and companies, and may stay in Rotary members' homes, university dormitories, hotels, or other places. Training may last for any length of time, and more than one team may travel on a single grant. Training team costs must meet the \$30,000 global grant minimum for total project cost, including team member expenses and other grant activities.

## QUALIFICATION AND STEWARDSHIP

### What districts must do

To participate in district grants and global grants, districts must complete an online qualification process in which they agree to follow and implement the financial and stewardship guidelines in the district memorandum of understanding. Each district must also conduct a grant management seminar as part of the qualification process for clubs.

Each district is responsible for providing careful stewardship of Foundation funds. The requirements detailed in the memorandum of understanding include the following:

- Have a written financial management plan
- Plan activities thoroughly and involve Rotarians directly in project implementation
- Demonstrate transparency in all financial transactions
- Report to clubs each year on the use of the District Designated Fund
- Submit reports to the Foundation promptly
- Develop a method for reporting and resolving misuse of grant funds

### What clubs must do

Clubs must complete an annual qualification process to be eligible for global grants. To qualify, clubs must send one or more members to the district's grant management seminar, sign and adhere to the club memorandum of understanding, and fulfill any additional qualification requirements set by the district. Clubs are also expected to comply with the stewardship requirements detailed in the club memorandum of understanding.

## GRANT APPLICATION PROCESS

Once they are qualified, clubs and districts may submit grant applications online. Applications are accepted on a rolling basis throughout the year.

District grants follow a two-year business model: Planning and applying happen during the first year, and projects take place during the second.

The Rotary Foundation administers global grants through a two-step application process. The first step is a knowledge check for sponsors, to confirm their project meets global grant requirements and the Foundation's eligibility standards before they spend significant time preparing a grant application. In the second step, applicants provide all the information necessary for the Foundation to make a grant award decision.

## REPORTING

Districts are required to submit a report to the Foundation and to all clubs in the district on the disbursement of funds within 12 months of receiving a district grant. Global grant sponsors must submit progress reports every 12 months from payment for the life of the grant and a final report within two months of the grant's completion.

## GRANTS RESOURCES

- **Giving & Grants:** Quarterly newsletter with information about fundraising and grants
- **A Guide to Global Grants (1000-EN):** Resource for clubs and districts on managing global grants
- **Lead Your District: Rotary Foundation Committee (300-EN):** Resource for district leaders about Foundation activities, including information about district grants
- **Terms and Conditions for Rotary Foundation District Grants and Global Grants**
- **Areas of Focus Policy Statements:** Detailed outline of the goals of each area of focus
- **Community Assessment Tools for Rotary projects**
- **[www.rotary.org/grants](http://www.rotary.org/grants)**

For ordering information, see page 28.

# ROTARY ALUMNI

The Rotary Foundation has a proud history of funding more than 123,000 people to participate in its programs for various scholarships and vocational exchanges. Now Rotary has expanded its view of alumni to include participants of Rotaract, Interact, Youth Exchange, and Rotary Youth Leadership Awards (RYLA) programs.

As talented, committed individuals, alumni know Rotary well and share its vision of furthering world understanding and peace. Alumni are powerful advocates for Rotary because they put a human face on Rotary activities and demonstrate a commitment to the world community. They serve as volunteers for local and international service projects and are potential Rotary club members and Foundation donors. They are available to speak at Rotary functions or participate in Rotary programs. Contact your district alumni chair to find alumni available for speaking engagements or club activities.

Encourage all alumni to register and create an account on My Rotary to help keep in touch and share current contact information. Alumni can also participate in discussion boards and groups. Club and district officers have access to a report on all alumni in their district.

Alumni engagement can take a variety of forms, but alumni have expressed interest in being involved with Rotary in the following ways:

- **Join leaders:** Finding a Rotary, Rotaract, or Interact club that meets their needs and expands their leadership skills
- **Exchange ideas:** Connecting with a diverse group of professionals through a Rotary program or a Rotarian Action Group
- **Take action:** Giving alumni a chance to volunteer and participate in international service through a grant or service project

Alumni associations are groups of alumni who unite to pursue service and fellowship. There are more than 100 alumni associations worldwide, and the number is growing. Consider nominating an association in your area for the Alumni Association of the Year Award, an honor given to an outstanding group that promotes Service Above Self and the lasting connections between alumni and Rotarians. If there is no alumni association in your area, consider starting one.

The Global Alumni Service to Humanity Award is Rotary’s highest alumni honor. Each Rotary district may nominate one qualified alumnus/alumna per year.

## ALUMNI RESOURCES

- **Reconnect:** Quarterly newsletter with news and information for alumni
- **Rotary Alumni Association of the Year Nomination Form:** Describes the criteria and nomination process for the Alumni Association of the Year Award
- **Rotary Alumni Association of the Year recipients:** Describes past winners of this award
- **Rotary Global Alumni Service to Humanity Award Nomination Form:** Describes the criteria and nomination process for the Global Alumni Service to Humanity Award
- **Rotary Global Alumni Service to Humanity Award recipients:** Describes past winners of this award
- **Alumni pins:** Lapel pin to recognize alumni, available for purchase on [shop.rotary.org](http://shop.rotary.org)
- **Alumni Association Frequently Asked Questions:** Explores basic information on Rotary alumni associations
- [www.rotary.org/myrotary/en/alumni](http://www.rotary.org/myrotary/en/alumni)

For ordering information, see page 28.



# FOUNDATION FUNDING

## ANNUAL FUND-SHARE

### Purpose

Annual Fund-SHARE is the primary source of funding for a broad range of local and international Rotary Foundation activities.

Every Rotarian, Every Year (EREY) is the fundraising initiative to encourage support for the Foundation's Annual Fund. EREY aims to engage every Rotary club member by:

- Encouraging every Rotarian to contribute to the Annual Fund every year
- Encouraging every Rotarian to participate in a Foundation grant or program every year

### How fund works

Through the SHARE system, contributions to The Rotary Foundation are transformed into grants that change lives.

At the end of every Rotary year, contributions to the Annual Fund-SHARE from all Rotary clubs in a district are directed into two funds:

- Fifty percent is credited to the World Fund.\*
- Fifty percent is credited to the District Designated Fund.

The Foundation uses the World Fund portion to pay for the worldwide grant and program opportunities available to all Rotary districts. Your district uses the District Designated Fund portion to fund the Foundation grants and programs of its choice.

The Rotary Foundation's funding cycle makes district contributions available for use three years after they are received. The three-year cycle gives districts time to plan projects and activities and allows the Foundation to invest the contributions.

Your district Rotary Foundation committee decides how to use the District Designated Fund allocations in consultation with the clubs in the district. Districts may use up to 50 percent of the fund (which might also include spendable earnings from gifts to the Endowment

Fund-SHARE) for district grants; the remainder may be used for global grants or be donated to PolioPlus, Rotary Peace Centers, or another district.

In addition to SHARE, donors may direct their Annual Fund contributions directly to the World Fund or to one of the Foundation's six areas of focus. Annual Fund contributions directed to an area of focus are credited toward a club's annual giving goal and per capita giving calculations. Likewise, these contributions are eligible for all Annual Fund recognition opportunities, including EREY, Rotary Foundation Sustaining Member, Paul Harris Fellow, Paul Harris Society, Major Donor, and Arch Klumph Society. They also count toward all club recognition opportunities.

Contributions designated for areas of focus are not included in a district's SHARE calculation and do not generate any increases in the amount of the District Designated Fund. Because Annual Fund-SHARE contributions are the primary source of funding for Foundation grants, SHARE-designated contributions from Every Rotarian, Every Year remain crucial and therefore are strongly encouraged.

\*To safeguard the Foundation's ability to support Rotarians, clubs, and districts, the Trustees have laid out a clear order of priority to ensure that programs, operating expenses (fund development and general administrative expenses), and the operating reserve are funded. The funding model that took effect on 1 July 2015 provides a more predictable level of financial support for programs and the operating expenses it takes to make them successful. [Learn more](#) about the long-term strategy to secure the Foundation's future.

Most nonprofit organizations allocate a percentage of their contributions to support future fundraising efforts. Looking ahead, the Foundation will continue its strong record of financial accountability and transparency.

## ENDOWMENT FUND

**Purpose** Ensures the long-term viability of the Foundation's grants and programs. Spendable earnings from this endowed fund also enable the Foundation to expand existing activities and occasionally underwrite new ones like the Rotary Peace Centers.

**How fund works** Contributions are invested in perpetuity. A percentage of the total value of the fund is directed annually to Foundation grants and programs.

- Types of contributions**
- Outright gifts of cash, investments, or other property
  - Life income gifts (e.g., charitable remainder trusts, charitable gift annuities, pooled-income funds)
  - Testamentary gifts through wills or estate plans
  - Beneficiary of life insurance, retirement plan accounts, or other financial accounts

## FOUNDATION FUNDING RESOURCES

- **Giving & Grants:** Quarterly newsletter with information about fundraising and grants
- **Ways to Give brochure (173-EN):** Overview of Annual Fund, Endowment Fund, term gift, and Rotary Peace Centers endowed-naming opportunities
- **Every Rotarian, Every Year brochure (957-EN):** For distribution to every club member, outlining the need for Rotarians to participate in and contribute to Rotary Foundation grants and activities
- **Peace Is Possible brochure (850-EN):** Overview of the Rotary Peace Centers and available naming opportunities
- **Your Rotary Legacy brochure (330-EN):** Describes benefits of giving to the Endowment Fund and includes a form to join the Bequest Society or to register as a benefactor
- [www.rotary.org/plannedgiving](http://www.rotary.org/plannedgiving)

For ordering information, see page 28.

# FOUNDATION RECOGNITION

The Rotary Foundation offers a number of opportunities to show its appreciation to individuals for supporting our grants and programs.

\*In [My Rotary](#), you can view your Donor History Report, which includes your personal contribution history and recognition summary. You can also request this report by emailing [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

## INDIVIDUAL RECOGNITION

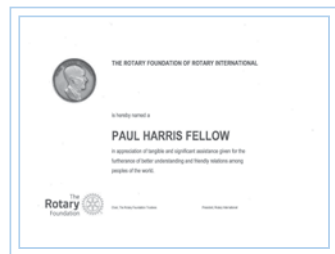
### Rotary Foundation Sustaining Member

A Rotary Foundation Sustaining Member personally contributes \$100 or more each Rotary year to the Annual Fund. These contributions count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition banners. Use the Sustaining Member badge stickers to recognize these donors in your club.



### Paul Harris Fellow

Paul Harris Fellow recognition is given in appreciation to anyone who contributes (or in whose name is contributed using Foundation recognition points) a gift of \$1,000 or more cumulatively to the Annual Fund, PolioPlus Fund, or an approved global grant. Recognition consists of a certificate and pin. Optional recognition items include a medallion for \$15 and a complimentary certificate cover.



## Certificate of Appreciation

Certificate of Appreciation recognition is given to honor a business or organization. Since Paul Harris Fellows are only for individuals, a donor may use their Foundation recognition points to award a business or organization a certificate of appreciation.



## Multiple Paul Harris Fellow

Multiple Paul Harris Fellow recognition is given at subsequent \$1,000 levels. Recognition consists of a pin set with additional stones corresponding to the recipient's recognition amount.



### PHF

Level	*Range	Pin
+1	\$2,000 to \$2,999	one sapphire
+2	\$3,000 to \$3,999	two sapphires
+3	\$4,000 to \$4,999	three sapphires
+4	\$5,000 to \$5,999	four sapphires
+5	\$6,000 to \$6,999	five sapphires
+6	\$7,000 to \$7,999	one ruby
+7	\$8,000 to \$8,999	two rubies
+8	\$9,000 to \$9,999	three rubies

\*Range can be a combination of cash contributions and Foundation recognition points received.

## Paul Harris Society

The Paul Harris Society recognizes individuals who choose to contribute \$1,000 or more each Rotary year to the Annual Fund, PolioPlus Fund, or an approved global grant. Paul Harris Society contributions count toward these recognition categories: Rotary Foundation Sustaining Member (Annual Fund contributions only),



Paul Harris Fellow, Multiple Paul Harris Fellow, Major Donor, and club recognition banners. Recognition consists of a chevron-style pin provided by your district Paul Harris Society coordinator.

## Major Donor

The Rotary Foundation recognizes individuals or couples whose combined giving has reached \$10,000, regardless of the gift designation. This recognition level can be achieved only through personal contributions and not through recognition points. Major Donors may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level.



Level	Range
1	\$10,000 to \$24,999
2	\$25,000 to \$49,999
3	\$50,000 to \$99,999
4	\$100,000 to \$249,999

## Arch Klumph Society

Donors who contribute \$250,000 or more become members of the Arch Klumph Society. Portraits, biographies, and, in some cases, video clips are housed in the digital Arch Klumph Gallery on the 17th floor of Rotary International World Headquarters; another digital gallery travels to Rotary events around the world. Members also receive lapel pins and pendants, signed certificates, and invitations to the society's exclusive events, held worldwide. New members are invited to a special induction ceremony at Rotary headquarters.



- Trustee Circle — \$250,000 to \$499,999
- Chair Circle — \$500,000 to \$999,999
- Foundation Circle — \$1 million to \$2,499,999
- Platinum Trustee Circle — \$2.5 million to \$4,999,999
- Platinum Chair Circle — \$5 million to \$9,999,999
- Platinum Foundation Circle — \$10 million and above

## Benefactor

A Benefactor is someone who informs The Rotary Foundation in writing that he or she has made a provision in his or her estate plan for the Foundation, or who makes an outright gift of \$1,000 or more to the Endowment Fund. Benefactors receive a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin.



## Bequest Society

The Rotary Foundation recognizes couples or individuals who have made commitments in their estate plans totaling \$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and a pin commemorating the commitment at each new recognition level.



Level	Range
1	\$10,000 to \$24,999
2	\$25,000 to \$49,999
3	\$50,000 to \$99,999
4	\$100,000 to \$249,999
5	\$250,000 to \$499,999
6	\$500,000 to \$999,999
7	\$1 million to \$2,499,999
8	\$2.5 million to \$4,999,999
9	\$5 million to \$9,999,999
10	\$10 million and above



## CLUB RECOGNITION

The Rotary Foundation offers a number of opportunities to show its appreciation to Rotary clubs for supporting its grants and programs.

The Banner Report displays a club's current Rotary year progress toward becoming an 100% Foundation Giving Club, 100% EREY Sustaining Member Club, and the Top Three Per Capita in Annual Fund Giving banner recognition. Banner recipients listed in this report may fluctuate throughout the Rotary year due to changes in membership and additional or redistributed contributions. Final certification is processed by The Rotary Foundation after the close of the Rotary year. Banners will be shipped to current district governors. Request the Banner Report at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

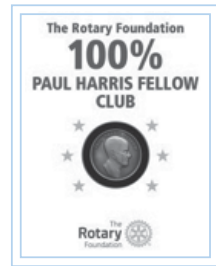
## 100% Foundation Giving

This banner is awarded to clubs that achieve an average of \$100 in per capita giving and 100 percent participation, with every active (dues-paying) member contributing some amount to any/all designations, including the Annual Fund, PolioPlus Fund, approved global grants, and the Endowment Fund, during the Rotary year. This annual banner recognition is awarded at the end of the Rotary year.



## 100% Paul Harris Fellow Club

To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time your district governor requests banner recognition. This banner recognition is a one-time-only award, but the intent is that the club will maintain its membership at the 100% Paul Harris Fellows level.



To obtain this recognition:

1. A club representative must contact the district governor after determining that all current, dues-paying club members are Paul Harris Fellows.
2. The district governor must confirm that all members are Paul Harris Fellows by using the Club Recognition Summary, and then notify The Rotary Foundation by email at [rotarysupportcenter@rotary.org](mailto:rotarysupportcenter@rotary.org).

The top of the Club Recognition Summary indicates if the club received the 100% Paul Harris Fellow Club banner along with the date this was achieved.

## 100% EREY Sustaining Club

Rotary clubs must achieve a \$100 per capita to the Annual Fund and every active (dues-paying) member must personally contribute \$100 or more to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year.





## Top Three Per Capita Clubs in Annual Fund Giving

Banners are given to the top three Annual Fund per capita giving clubs in each district. To be eligible, clubs must achieve a minimum of \$50 in per capita annual giving. This banner recognition is awarded at the conclusion of the Rotary year.



## 100% Paul Harris Society Club

This recognition is awarded to clubs in which every active (dues-paying) member has contributed a minimum of \$1,000 outright to the Annual Fund, PolioPlus Fund, or an approved global grant during a given Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year.



## FOUNDATION RECOGNITION POINTS

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, PolioPlus Fund, or an approved global grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Contributions to the Endowment Fund are not eligible.

Donors can extend Foundation recognition points to others to help them become, or to name them as, a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor uses the points or until the donor's death at which time they expire (unless the donor is a Major Donor and then their points may be used by their surviving spouse).

Note: Foundation recognition points do not count toward Paul Harris Society and Major Donor recognition.

### Transfer rules

A minimum of 100 Foundation recognition points must be transferred at a time, and an authorizing signature is required when you complete the [Paul Harris Fellow Recognition Transfer Request Form](#).

Note: Foundation recognition points may not be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow to receive recognition points.

## RECOGNITION RESOURCES

- [Every Rotarian, Every Year Rotary Foundation Sustaining Member badge stickers \(956-EN\)](#)
- [Every Rotarian, Every Year brochure \(957-EN\)](#): Information about the Annual Fund and SHARE
- [Paul Harris Society brochure \(099-EN\)](#): Promotes the Paul Harris Society program
- [Major Gifts, Major Impact brochure \(166-EN\)](#): Information about major gifts
- [Your Rotary Legacy brochure \(330-EN\)](#): Information about giving to the Endowment Fund
- [Arch Klumph Society brochure \(308-EN\)](#): Information on the Arch Klumph Society

For ordering information, see page 28.

# AWARDS

## THE ROTARY FOUNDATION DISTRICT SERVICE AWARD

**Nominators: District governors**

**Deadline: Ongoing**

The District Service Award recognizes Rotarians for their Foundation-related humanitarian efforts. Honorees receive a certificate, awarded at the district level. (District governors may obtain up to 20 blank certificates at no cost.)

## THE ROTARY FOUNDATION CITATION FOR MERITORIOUS SERVICE

**Nominators: District governors**

**Deadline: Ongoing**

The Citation for Meritorious Service recognizes Rotarians who have demonstrated active service to The Rotary Foundation for more than one year.

## THE ROTARY FOUNDATION DISTINGUISHED SERVICE AWARD

**Nominators: Any Rotarian**

**Deadline: 30 June**

The Distinguished Service Award is the Foundation's highest service recognition. It honors exemplary service to the Foundation beyond the district and over an extended period. Only recipients of the Citation for Meritorious Service are eligible, and they cannot be nominated less than four years after receiving the citation.

## SERVICE AWARD FOR A POLIO-FREE WORLD

**Nominators: Any Rotarian**

**Deadline: 1 November**

This annual award recognizes the outstanding contributions of Rotary members to the polio eradication campaign and encourages efforts in the final push to eradicate the disease. In geographic areas coinciding with World Health Organization regions, up to 10 service awards are given per region, recognizing outstanding service in polio eradication. Up to 10 international awards are given for broad service to the cause.

## ROTARY GLOBAL ALUMNI SERVICE TO HUMANITY AWARD

**Nominators: Regional Rotary Foundation coordinators**

**Deadline: 30 June**

This award honors outstanding Rotary alumni whose career and activities illustrate the impact of Rotary's programs on his or her service to humanity. Nominees must have demonstrated the social benefits of Rotary through extraordinary service activities and professional achievement, distinction in their profession or vocation, and sustainable service affecting the international community.

## ROTARY ALUMNI ASSOCIATION OF THE YEAR AWARD

**Nominators: Regional Rotary Foundation coordinators**

**Deadline: 30 June**

This award recognizes an alumni association that has increased awareness of the significant role alumni play in Rotary and has demonstrated the lasting impact of Rotary programs.

Nomination forms are available for download at [www.rotary.org/awards](http://www.rotary.org/awards). See forms for complete criteria.

# GENERAL RESOURCES

## MY ROTARY

The member website, known as My Rotary, is where you will find everything you need to conduct your Rotary business. Familiar tools and applications are now found under Club & District Administration. Sign in so you can:

- Monitor club membership initiatives, service activities, and Foundation giving goals through Rotary Club Central
- Give to The Rotary Foundation
- Learn more about Rotary Foundation activities
- Find volunteers, partners, and donations for your projects
- Apply for grants
- View your Donor History Report, which includes your contribution history and recognition summary

## REPORTS

Rotary leaders can access the following reports through My Rotary or Rotary's Support Center.

Report	Content	Type	Format	Location
Donor History Report	Provides a comprehensive breakdown of a donor's transactions (contributions, Foundation recognition point transfers, commitments, and recognition); use to reconcile contributions/recognition issues	Individual	PDF	My Rotary, Support Center

<b>Report</b>	<b>Content</b>	<b>Type</b>	<b>Format</b>	<b>Location</b>
EREY Eligibility Report	Provides eligibility dates achieved for EREY, Rotary Foundation Sustaining Member, and Paul Harris Society for current and previous Rotary years	Club, District	PDF, Excel	My Rotary, Support Center
Club Fundraising Analysis	Five-year dashboard of Annual Fund goals, giving, and recognition totals. Use it to set goals.	District	PDF, Excel	My Rotary, Support Center
Club Recognition Summary	Provides members' Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct participation, benefactors, last contribution date, and designation; indicates 100% Paul Harris Fellow Club achievement and date, along with the clubs' all-time Foundation giving; use to identify noncontributing clubs	Club, District	PDF, Excel	My Rotary, Support Center
Monthly Contribution Report	Provides contribution information by club for Annual Fund, other funds (global grants and PolioPlus), and Endowment Fund	District	PDF, Excel	My Rotary, Support Center

Report	Content	Type	Format	Location
Annual Fund Banner Recognition Status Report	Shows progress toward club banner recognitions (Top Three Per Capita in Annual Giving, 100% Foundation Giving, 100% EREY Sustaining Club) for a Rotary year; lists the percentage of participation by club for Foundation Giving and EREY Sustaining Member recognition	District	PDF, Excel	Support Center
Paul Harris Society Report	Provides Paul Harris Society membership and a four-year history of eligibility; includes tab with donor contact information	Club, District, Zone	PDF, Excel	My Rotary, Support Center
District Fundraising Profile	Provides an eight-year dashboard for district giving to the Annual Fund and Endowment Fund, and total contributions received; lists cumulative number of Paul Harris Society-eligible and members, Major Donors, major gifts, benefactors, and Bequest Society members; lists number of Foundation recognition points and total endowed funds and their market value	District	PDF, Excel	Support Center

Report	Content	Type	Format	Location
Recognition Report	Provides lists of Bequest Society, Major Donor, and Arch Klumph Society members with their recognition date; includes two tabs with mailing address information	Club, District, Zone	PDF, Excel	My Rotary, Support Center
Program Participants and Alumni by District	Provides a list of current and past program participants associated to a particular district	District	PDF, Excel	My Rotary, Support Center

## ORDERING PUBLICATIONS

Rotary Foundation resources can be ordered at [shop.rotary.org](http://shop.rotary.org); from Publications Order Services (email: [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org); phone: +1-847-866-4600; fax: +1-847-866-3276); or from your local Rotary International office.

## WHERE TO DIRECT QUESTIONS

Call +1-866-976-8279 or email [rotarysupport.center@rotary.org](mailto:rotarysupport.center@rotary.org) — Rotary’s Support Center — to check on contributions and recognition points, find information about grants, and ask questions.

Rotarians who don’t speak English should contact their local Rotary International office.

## ZONE RESOURCES

Regional Rotary Foundation coordinators (RRFCs) promote Foundation activities and fundraising in their zone or area. RRFCs train their zone team of assistant regional Rotary Foundation coordinators and district leaders in setting and achieving fundraising and program goals.

Endowment/major gifts advisers work closely with regional and district leaders to develop personalized plans for identifying, cultivating, and soliciting major gifts. They also help facilitate events that engage current Foundation supporters and develop prospective donors.



A list of current RRFs and endowment/major gifts advisers is available at [www.rotary.org](http://www.rotary.org).

Regional leaders are effective speakers and trainers at regional, district, and club events.

## DISTRICT RESOURCES

To provide continuity of leadership, the district Rotary Foundation committee chair is appointed for a three-year term. The three incoming district governors (if selected) for the chair's term will participate in selecting the chair. This selection should occur and be reported to the Foundation no later than 1 March of the calendar year in which the chair takes office, on 1 July.

The district Rotary Foundation committee chair may be appointed for another three-year term, with the agreement of the governors under whom the chair will serve. If possible, this post should be filled by a past district governor (not the current governor). A district does not have access to its District Designated Fund until the chair is appointed. The chair serves under the leadership of the district governor, and decisions on the use of the District Designated Fund must reflect the decisions of the district Rotary Foundation committee. Each district governor appoints chairs for the PolioPlus, grants, fundraising, and stewardship subcommittees, who serve during the governor's year in office only.

The Gift and Estate Planning Program, formed in 2014, is a collective of Rotary members with gift planning expertise. They work with district and zone leaders to promote gifts to the Endowment Fund and structure individual gifts. Email [plannedgiving@rotary.org](mailto:plannedgiving@rotary.org) for more information.

## MAKING A CONTRIBUTION

Contributions to The Rotary Foundation may be made by credit card, check, or wire transfer, or through your Rotary club. At [www.rotary.org/give](http://www.rotary.org/give), individuals and clubs can make a one-time contribution or enroll in the Foundation's recurring giving program, Rotary Direct. Information on gifts of stocks, bonds, and mutual funds is also available on the website.

Individuals and clubs also can use The Rotary Foundation contribution form, available at [www.rotary.org](http://www.rotary.org).

With all gifts, be sure to use your member ID to ensure proper credit and recognition.

## Matching Gifts

The Rotary Foundation is recognized as a 501(c)(3) charity in the United States and may be eligible to receive corporate matching gifts from your employer. Many international companies also match Rotary Foundation contributions from their employees. Ask your human resources department whether your gift can be matched.

If you use The Rotary Foundation contribution form, send your donation to the appropriate address for your region. In countries with currency restrictions, contact your district Rotary Foundation committee chair for guidance.

### United States

The Rotary Foundation  
14280 Collections Center Drive  
Chicago, IL 60693  
USA

### Canada

The Rotary Foundation (Canada)  
c/o 911600  
P.O. Box 4090 STN A  
Toronto, ON M5W 0E9  
Canada

### Brazil

Rotary International Office  
Rua Tagipuru 209  
01156-000 São Paulo, SP  
Brazil

### Europe and Africa

Rotary International Office  
Witikonstrasse 15  
CH-8032 Zurich  
Switzerland

### Germany

Rotary Deutschland  
Gemeindienst e. V.  
Kreuzstraße 34  
40210 Düsseldorf  
Germany

### Great Britain and Ireland

RI in Great Britain and Ireland  
Kinwarton Road  
Alcester  
Warwickshire B49 6PB  
England

### Japan

Rotary International Office  
Mita Kokusai Building 24F  
Mita 1 Chome 4-28, Minato-ku  
Tokyo 108-0073  
Japan

### Korea

Rotary International Office  
Rm. 705, 70, Gukjegeumyung-ro  
Yeongdeungpo-gu  
Seoul 150-733  
Korea

### South Asia

Rotary International Office  
Thapar House  
2nd Floor, Central Wing  
124 Janpath  
New Delhi 110 001  
India

## **Southern South America**

Rotary International Office  
Florida 1, P. 2  
1005 Buenos Aires, CF  
Argentina

## **South Pacific and Philippines**

Rotary International Office  
Level 2  
60 Phillip Street  
Parramatta, NSW 2150  
Australia



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1560 Sherman Avenue  
Evanston, IL 60201-3698 USA  
[www.rotary.org](http://www.rotary.org)

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