

Quick Reference Guide 2000-01

This quick reference has been designed to provide Rotarians at the club level with basic information about how they can participate in Rotary Foundation programs and how they can support The Rotary Foundation financially. More information is available on the Rotary Web site: www.rotary.org.

All application forms are available on the Web site except where otherwise indicated. Forms with a catalog number and all resources and materials may be ordered from RI's Publications Order Services Section (telephone: 847-866-4600; fax: 847-866-3276) or RI service centers.

Notes and abbreviations:

Cost references are provided in U.S. dollars. TRF (The Rotary Foundation)
DDF (District Designated Fund — also known as SHARE funds)

HUMANITARIAN PROGRAMS

POLIOPLUS AND POLIOPLUS PARTNERS GRANTS

Purpose Support global polio eradication efforts in polio-endemic countries

including national immunization days and monitoring of polio

virus transmission.

Funding PolioPlus grants are funded by the general PolioPlus Fund. PolioPlus

Partners projects are funded by cash and *SHARE* contributions. Partners cash contributions are matched if funds are available.

Application Projects must be submitted by National PolioPlus chairpersons

(listed in the Official Directory) or a major partner agency (such

as the World Health Organization and UNICEF).

• Trustees approve PolioPlus grants at regularly scheduled meetings.

• PolioPlus Partners grants are approved on a rolling basis.

Staff Contact Information

E-mail questions to polioplus@rotaryintl.org or telephone (847) 866-3345.

HEALTH, HUNGER AND HUMANITY (3-H) GRANTS

Purpose Fund long-term (2-5 years) international development projects to

improve health, alleviate hunger, or enhance development through

self-help activities.

Funding Amount provided by TRF: \$100,0000-\$300,000

Amount required from sponsor: 10% (up to \$25,000)

Application • Step 1: Submit preliminary proposal letter to TRF.

• Step 1-a: (Optional) Apply for a 3-H Planning Grant (6 months to 1 year in duration). Contact Foundation

staff for further information.

• Step 2: Submit a 3-H Grant Application to TRF.

Deadlines • Step 1: Preliminary Proposal: 1 January or 1 July

• Step 2: 3-H Application: 15 March or 15 September

Criteria Project must benefit a large number of people; be of a self-help **for Success** pature: involve a significant number of Rotarians in at least two

nature; involve a significant number of Rotarians in at least two countries; be clearly identified as Rotary-supported; be initiated, controlled, and implemented by Rotarians; and be self-sustaining

after grant funding has ended.

Decision Trustees review applications: October/November and March/April

Cannot Purchase of land or substantial buildings (existing or construction) **be used for** and payment of operations or administrative expenses for another

organization, seminars, conferences, or international exchanges.

3-H PLANNING GRANTS

Purpose Fund advance planning for 3-H projects of significant size

and impact.

Funding Club/District — out of World Fund — up to \$20,000 —

no time restriction

Application Preliminary proposal by letter; *3-H Planning Grant Application*

• Proposal: 15 February or 15 August

• Application: 1 May or 1 November

Decision 30 June or 31 December

Matching Grants

Purpose Assist international humanitarian service projects in cooperation with

Rotarians in another district.

Funding • TRF provides a 1:1 match of sponsor donations up to \$50,000.

• Sponsors must provide at least half of the project cost.

• Contributions can be made by utilizing district SHARE funds.

Application Submit a *Matching Grant Application* (141-EN) to TRF.

• Applications seeking a match of less than \$25,000 can be submitted between 15 July and 31 March.

• Competitive applications seeking more than \$25,000 must be

submitted by 1 August or 1 January.

Criteria Projects must be new (not already in progress) and feature the active, personal participation of Rotarians in both the sponsor and project site countries.

site coulities.

Decision• Grants for <\$25,000 are approved on a rolling basis from 1 August through 15 May.

 Grants for >\$25,000 are reviewed at the October/November or March/April meetings of the Trustees.

CannotPurchase of land or substantial buildings (existing or construction)

be used for

and payment of salaries, operations or administrative expenses for

another organization, seminars, conferences, or international

exchanges.

HELPING GRANTS

Purpose Support humanitarian projects in non-Rotary countries or where

significant participation of local Rotarians is limited.

Funding • TRF matches 50% of sponsor contributions up to \$15,000.

• Sponsors must provide at least two-thirds of the project cost.

• Contributions can be made by utilizing district *SHARE* funds.

Application Submit a *Helping Grant Application* (150-EN) to TRF.

Deadlines Applications can be submitted between 15 July and 31 March.

Criteria Projects must be initiated, sponsored, and monitored by the

for Success sponsor club/district outside the project site country.

Decision Grants are approved on a rolling basis from 1 August through

15 May.

Cannot See "Cannot be used for" in Matching Grants (page 2).

be used for

New Opportunities Grants

Purpose Support international humanitarian service projects which advance

Rotary ideals but do not meet the eligibility criteria of existing

Rotary Foundation programs.

Funding Through DDF up to \$10,000

Application Submit a *New Opportunities Grant Application* (128-EN) to TRF.

Criteria The project must benefit a country other than the sponsor's and must include significant Rotarian involvement. The district must

have allocated DDF to the Humanitarian Category of the *SHARE* system in an amount at least equal to the grant amount requested.

Decision Grants are approved on a rolling basis.

Cannot Purchase of land or substantial buildings (existing or construction)

be used for and payment of administrative costs.

COMMUNITY ASSISTANCE PROGRAM GRANTS — SHARE-FUNDED

Purpose Support projects that increase involvement or strengthen

relationships in the sponsor's community or country.

Funding Districts can use DDF from the Humanitarian Programs allocation.

Allocations range between \$1,000 and \$10,000 based on the

percentage of the district's Annual Giving.

Application Submit a *Community Assistance Program Application* (116-EN)

to TRF.

Criteria Projects must be new (not already in progress); feature the active,

for success personal participation of Rotarians; and be publicly identified as

being Rotary-supported.

Decision Grants are decided on a rolling basis from 15 September to 31 May.

Cannot Purchase of land or substantial buildings (existing or new

be used for construction) and payment of salaries, operations or administrative

expenses for another organization, or travel expenses.

DISCOVERY GRANTS

Purpose Provide travel and related expenses for Rotarians or teams including

at least one Rotarian to carry out the planning for future

international service projects.

• Carl P. Miller endowment (competitive): up to \$3,000

• DDF: up to \$5,000

Application Submit a *Discovery Grant Application* (198-EN) to TRF.

Deadlines • Carl P. Miller Grants: 1 October and 1 April

• DDF-funded grant applications are accepted on a rolling basis.

Criteria Must involve at least two countries and support the mission of

for Success TRF. Prior communication between clubs/districts in the two

countries must have taken place.

Decision • Carl P. Miller Grants: 15 August and 15 February

• DDF-funded grants are approved on a rolling basis.

Cannot Travel to conferences, establishing a sister club/district relationship,

be used for or fundraising.

GRANTS FOR ROTARY VOLUNTEERS

Purpose Subsidize volunteer service when it might not be otherwise

financially feasible.

Funding TRF funds the travel (lowest economy-class round-trip airfare)

and up to \$50 per day for 4-8 weeks of service on a Rotary-

approved project.

Application Submit a *Grants for Rotary Volunteers Application for Volunteer*

Service form to TRF (available from Foundation staff).

Deadline Applications must be submitted at least 6 weeks prior to the

beginning of the volunteer service term.

Decision Grants are decided on a rolling basis within 6 weeks of application.

DISASTER RELIEF GRANTS

Purpose Provide relief assistance for disasters such as earthquakes, hurricanes,

floods, volcanic eruptions, and wildfires.

Funding Projects are funded through DDF up to \$10,000.

Application • The governor of the affected district must submit a request for

assistance to Rotary International. RI issues a Notice of Disaster giving a description of the crisis and information on how to meet

resulting needs.

 The DDF allocation must be authorized in writing by the district governor of the donating district and sent to the SHARE coordinator.

Decision Grant funds are released upon confirmation that the sponsor

district has funds available in its DDF to fulfill its contribution.

Humanitarian Transportation Grants

Purpose Provide funds to cover the costs of transporting donated

humanitarian supplies and equipment.

Funding SHARE funds donated by districts to a special pool of funds

support applications for this program.

Application Submit club and district *Humanitarian Transportation Grant*

Applications (117-EN) to TRF.

Criteria To transport goods donated free of charge; estimated cost of the goods must be at least 10% greater than transportation costs.

Decision Grants are approved on a rolling basis depending upon available

funds in the special pool.

ROTARY PEACE PROGRAM GRANTS

Purpose Support events of broad human concern, involving international

cooperation, and oriented toward positive suggestions for personal (or club or district) action, including at least 50% discussion.

Funding TRF grant provides up to \$25,000. Projects may be supported

by SHARE funds.

Application Clubs or districts must submit a *Rotary Peace Programs Grant*

Application (available from TRF staff) through the RI Director

or Foundation Trustee from their region.

Deadline Applications must be submitted by 1 February or 1 August of the

year preceding the Rotary year in which the event takes place.

Criteria Applications should include the purpose, theme, and nature of the

for Success event, together with its proposed budget, time, and place.

Decision Grant applications are reviewed at the October/November and

March/April Trustees' meetings.

Staff Contact Information

Humanitarian Grants

E-mail questions to grantsm@rotaryintl.org or telephone (847) 866-3334.

HUMANITARIAN PROGRAMS RESOURCE MATERIALS

PolioPlus: A Gift to the Children of the World (317-EN). A new 11-minute video that examines Rotary's involvement in eradicating polio worldwide, shows how all Rotarians can be involved, and provides an update on the changing battle against polio and the importance of continued Rotarian involvement.

PolioPlus Video Feature Report "Polio: The Final Chapter" (328-EN). This 10-minute feature report is a membership tool for presentations at Rotary and non-Rotary venues. The video spotlights Rotary's world-wide commitment to polio eradication as well as the effort's unique volunteer element.

Humanitarian Grants Programs (130-EN). Booklet containing comprehensive information on all of The Rotary Foundation's Humanitarian Grants Programs.

Humanitarian Programs: Building a Better World (118C-EN). An 11-minute video of several Rotary Foundation-funded projects in action.

A Guide to Applying for Rotary Foundation Grants (125-EN). Information on the Matching Grants and 3-H Grants application processes.

A Guide to Developing and Managing International Service Projects (126-EN). Steps Rotary clubs can follow using tools of Rotary International and The Rotary Foundation.

EDUCATIONAL PROGRAMS

Ambassadorial Scholarships

Purpose Provide scholarships to students who serve as ambassadors of

goodwill to improve international understanding.

Funding SHARE system option cost for that program year, currently:

Academic-Year Scholarships for one academic year of studies abroad — maximum \$23,000 including transportation, fees, room and board,

and contingency funds;

Multi-Year Scholarships for two years of degree-oriented studies

abroad — \$11,000 a year flat grant;

 ${\it Cultural Scholarships} \ for \ three \ to \ six \ months \ of \ intensive \ language$

training and cultural immersion abroad while living with a

homestay family — includes transportation — \$10,000 and \$17,000

respectively.

Vocational Training Scholarships for students from low-income countries, to conduct hands-on practical training abroad for three to six months — \$10,000 and \$15,000 respectively (funded through the

World Fund).

Application Districts submit an *Ambassadorial Scholarships Application* (139-EN).

Deadlines Applications from districts due at TRF 1 October. Check with

district Scholarships chairperson for district deadline.

Criteria Applicants must have completed two years of college or university **for Success** coursework. See Web site for complete criteria.

Decision Trustee-approved applicants receive confirmation 15 December.

CannotRotarians; Honorary Rotarians; employees of a club, district, or other Rotary entity, including Rotary International; spouses, lineal

descendants (child or grandchild by blood or legal adoption), ancestors (parent or grandparent by blood) of any living person in

the foregoing categories; or spouses of lineal descendants.

Staff Contact Information

Ambassadorial Scholarships

E-mail questions to scholarshipinquiries@rotaryintl.org or telephone (847) 866-4459.

ROTARY GRANTS FOR UNIVERSITY TEACHERS

Purpose Provide grants to Rotarians and non-Rotarians to strengthen higher

education in low-income countries while building international

understanding and friendship.

Funding SHARE DDF: \$10,000 for 3-5 months OR \$20,000 for 6-10

months of service

Application Districts submit a *Rotary Grants for University Teachers Application*

(193-EN).

Deadlines Applications from districts due at TRF 1 October. Check with

district Scholarships chairperson for district deadline.

Criteria Applicant must hold (or have held, if retired) a college or university for **Success** appointment for 3 or more years — no specific rank. Applicant's

appointment for 3 or more years — no specific rank. Applicant's home and prospective host countries must have at least one Rotary club. Applicant must teach an academic field useful to the host country and demonstrate proficiency in the language of the host

country. See Web site for complete criteria.

Decision 15 December for teaching assignments beginning the next

Rotary year.

Staff Contact Information

Rotary Grants for University Teachers

E-mail questions to scholarshipinquiries@rotaryintl.org or telephone (847) 866-4459.

ROTARY CENTERS FOR INTERNATIONAL STUDIES

Purpose Provide Rotary World Peace Scholarships to students pursuing a

2-year master's-level degree in international relations, peace, and conflict resolution at one of seven official Rotary Centers for International Studies (program begins in 2002-03 Rotary year).

Funding Transportation, tuition, fees, room and board, and limited expenses

for the 21-month program

Applications Districts submit a *Rotary World Peace Scholarship Application*

(083-EN).

Deadlines Districts submit applications to TRF by 1 October. Check with

district Scholarships chairperson for district deadline.

Criteria Candidates should have appropriate undergraduate degree to gain

for Success entrance to the Rotary Centers master's degree programs and have

significant work experience in relevant fields with a demonstrated commitment to peace and international understanding.

Decision Trustee-approved applicants receive confirmation by 15 December.

Staff Contact Information

Rotary Centers for International Studies

E-mail questions to rotarycenters@rotaryintl.org or telephone (847) 866-3318.

Purpose Enable an exchange of teams of outstanding young non-Rotarian

business and professional persons between districts in different countries — several variations available (single vocation,

humanitarian, neighboring country).

Funding From the World Fund. Covers the cost of least expensive round-trip

transportation for four team members and one Rotarian team leader

for 4-6 weeks.

Additional Funding

• By DDF allocation, up to two additional non-Rotarian team

members — \$2,000 each.

• Language training (out of World Fund) — up to \$1,000 per team

(additional DDF may be applied).

• For one additional team of non-Rotarians per district per year

(from SHARE DDF) — \$11,000 (less for a neighboring country).

Applications Districts submit *GSE Application* (167-EN), *GSE Team Leader*

Application (260-EN), and GSE Team Member Applications (161-EN).

Deadlines Applications from districts due at TRF 1 November. Check with

district GSE chairperson for district deadline.

Criteria for Success Non-Rotarian team members (25-40 age range) must be currently employed in any recognized business or profession on a full-time basis. Rotarian team leader should be close in age to team members.

See Web site for complete criteria.

Decision Pairing confirmation to districts 31 January

Cannot PDGs (with the exception of immediate PDGs) may serve as team **be used for** leaders only if there has been an open selection process within the

district. Spouses may not travel with team members or leaders.

Staff Contact Information

Group Study Exchange

E-mail questions to gseinquiries@rotaryintl.org or telephone (847) 866-3330.

ROTARY FOUNDATION ALUMNI

Rotary Foundation alumni are the more than 75,600 people who have received program awards from the Foundation since 1947. Rotary Foundation alumni include Ambassadorial Scholars, Group Study Exchange team leaders and members, Rotary Volunteers, and recipients of Rotary Grants for University Teachers and Carl P. Miller Discovery Grants. Talented, committed individuals, they know Rotary well and share its vision of furthering world understanding and peace. They are available to speak at Rotary functions or to participate in Rotary programs. Rotary Foundation alumni are an excellent resource for presenting the message of the Foundation because they provide the "human face" of Rotary programs and a sense of commitment to the world community. They may also serve as additional volunteers for club/district projects and activities and are a potential source for Rotary club membership. Finally, they are an important potential resource for financial support of The Rotary Foundation and helping clubs and districts understand the human impact of Foundation programs.

Contact your district Alumni subcommittee chairperson to identify Rotary Foundation alumni who may be available to speak at your meeting or to invite alumni to participate in club activities.

EDUCATIONAL PROGRAMS RESOURCE MATERIALS

Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers (012-EN). Publication with information clubs and districts need to successfully sponsor and host Ambassadorial Scholars and University Teachers.

Ambassadorial Scholarships Program: Investing in World Peace (432-EN). A 10-minute video commemorating the 50th anniversary of The Rotary Foundation's first educational program, which can be used to promote the Ambassadorial Scholarships program at Rotary and Rotaract club meetings and on informational visits to secondary and post-secondary institutions.

Rotary Centers for International Studies (089-EN). Video covering the new educational priority of The Rotary Foundation; includes information about the unique university partnerships and degree programs and interviews with several of the Rotary Center directors. Useful for promoting the Centers and financial contributions to support the program through TRF, and for identifying Rotary World Peace Scholar candidates.

Group Study Exchange Brochure (160-EN). Four-color leaflet, suitable for display for clubs or districts. Describes the GSE program and application procedures for potential team members and Rotarians.

FOUNDATION FUNDING

ANNUAL PROGRAMS FUND CONTRIBUTIONS

Purpose

Provide the necessary funding for operation of Rotary Foundation programs. Go to *www.rotary.org* for additional information,

including ways to give.

How fund works

Contributions made by individuals, clubs, and districts are invested for three years.

After three years:

- 60% of the original contribution is returned to the district through the DDF.
- 40% of the original contribution is provided to the World Fund to support humanitarian programs and to provide one GSE per district.
- Investment earnings support administrative costs and may be used to benefit Foundation humanitarian and educational programs.

Recognition

Gifts to the Annual Programs Fund count towards Paul Harris Fellow Recognition, Multiple Paul Harris Fellow Recognition, and Rotary Foundation Sustaining Member Recognition.

PERMANENT FUND GIFTS

Purpose

Ensure the long-term viability of TRF and its programs. Earnings from the Permanent Fund, an endowed fund, enable TRF to expand existing programs and/or underwrite new humanitarian, cultural, and educational programs. Go to www.rotary.org for additional information, including ways to give.

How fund works

Contributions made by individuals are invested in perpetuity. A percentage of the total value of the fund is spent annually to benefit the programs of TRF.

Types

- Testamentary gifts through a will or estate plan
- Life income gifts (i.e., Charitable Remainder Trusts, Charitable Gift Annuities, Pooled Income Fund)
- · Outright gifts of property, cash, or investments

Recognition

Anyone who notifies TRF that he or she has made provision in his or her will or estate plan, or who makes an outright gift of at least \$1,000 is recognized by the Trustees as a Benefactor. Those who inform the Foundation that they have made a major gift commitment (\$10,000 or more) in their final estate plan will receive Rotary Foundation Bequest Society Recognition.

CONTRIBUTION RECOGNITION

Purpose Acknowledges the financial support generously provided by

individuals. Go to www.rotary.org for additional information.

Forms of contribution recognition:

Paul Harris

Acknowledges contributions of \$1,000 or equivalent.

Fellow

Multiple Acknowledges contributions of \$1,000-\$9,999.

Paul Harris

Fellow

Benefactor Acknowledges contributions of \$1,000 or equivalent to the

Permanent Fund or provision in estate plan.

Major gift Acknowledges contributions of at least \$10,000 or equivalent

(outright or cumulative giving to the Foundation).

Staff Contact Information

Fund Development

 $E-mail\ questions\ to\ fund development @rotary intl.org\ or\ telephone\ (847)\ 866-3277.$

FUND DEVELOPMENT RESOURCE MATERIALS

Annual Programs Fund (122C-EN). A five-minute video providing a visual montage of projects funded by TRF that gives a firsthand look at what the Foundation is able to accomplish, thanks to the generosity of Rotarians. (Available in English and French only.)

Paul Harris Fellows: Doing Good in the World (120-EN). An 11-minute video that provides an inspirational overview of Rotary Foundation programs and testimonials by Rotarians, designed to help increase the number of Paul Harris Fellows in Rotary clubs.

You Make the Difference (067-EN). A 10-minute video providing an inspirational overview of The Rotary Foundation.

Two Needs, Two Ways of Giving (173-EN). A brochure outlining the need for contributions to the Annual Programs Fund and the Permanent Fund.

DISTRICT ROTARY FOUNDATION RESOURCES

(Fill in the contact information for the Rotary Foundation committee representatives in your district.)

Rotary Foundation Committee chairperson	
Annual Programs Giving subcommittee chairperson	
Permanent Fund subcommittee chairperson	
Scholarships subcommittee chairperson	
GSE subcommittee chairperson	
PolioPlus subcommittee chairperson	
Grants subcommittee chairperson	
Alumni subcommittee chairperson	

RESOURCE MATERIALS

Rotary Foundation Facts (159-EN). A wallet-size brochure containing a brief statistical overview of the organization, scope, and programs of the Foundation.

You and Your Rotary Foundation (171-EN). A brochure describing the Foundation's international activities with a brief explanation of how individuals may participate.

The Rotary Foundation Handbook (300-EN). An up-to-date resource covering the Foundation, its programs and finances, as well as the procedures and relationships by which local clubs and districts may participate in Foundation programs.

1999-2000 Rotary Foundation Annual Report (187B-EN). Audited financial statements for The Rotary Foundation showing all revenues and expenditures for the 1999-2000 fiscal year, as well as program information and profiles.

The Rotary Foundation: The International Vision of Rotary (065-EN). A 15-minute video documentary with footage from around the world that provides an inspirational overview of the Foundation's humanitarian and educational programs.



The Rotary Foundation of Rotary International One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201-3698 USA 847-866-3000