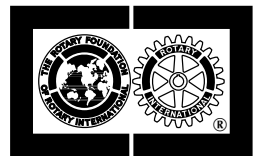


*The
2000-01
Rotary
Foundation
Handbook*



Object of Rotary

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

First. The development of acquaintance as an opportunity for service;

Second. High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

Third. The application of the ideal of service in each Rotarian's personal, business, and community life;

Fourth. The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

Introduction

The 2000-01 Rotary Foundation Handbook is intended to serve as a general reference manual and contains basic information pertaining to The Rotary Foundation and all of its programs.

- District governors-elect will find this handbook a vital timesaving tool in planning for the upcoming Rotary year.
- District governors will find it a highly useful roadmap in assessing and enhancing progress toward achieving district Foundation-related goals.
- District Rotary Foundation Committee chairpersons will find Chapters 4 and 5 especially helpful guides for mobilizing district Foundation support.
- District Rotary Foundation subcommittee chairs will find Chapter 5 particularly useful in helping to accomplish district Foundation fundraising and program participation goals.

All readers will find Chapter 1 a descriptive overview of The Rotary Foundation's structure and history. The chapter also contains a handy summary of each Foundation program. Clearly, the Foundation is a dynamic organization — one that is growing and evolving to meet the needs of the people it serves and the changing world in which they live. As new challenges to the global community arise, new programs are created to meet them, enlisting a variety of Rotary resources.

As indicated in Chapters 2, 3, 4, and 5, the Rotary district is the source of strength that energizes so much of the Foundation's success. The Rotary club is the basic building block of Rotary. Many Rotarians work only through and with their local clubs. Reaching the Rotary club with the Foundation's message is a critical objective.

The best way to reach the clubs is through the district. District leaders motivate and guide clubs to support Foundation programs. Their leadership is the springboard for recruiting students to become Rotary Foundation Ambassadorial Scholars and business people to participate in Group Study Exchanges, enlisting Rotarians as Rotary Volunteers, and forging club commitments to finance Matching Grants, Helping Grants, and 3-H Grants. The district is the vital link between the club and Foundation administration.

Chapters 6 and 7 provide additional key information for district leaders. Here you will become well acquainted with *SHARE* — the Foundation's unique contribution allocation system — and the types of service recognition available.

Chapter 8 gives a month-by-month overview of Foundation-related activities, including important application deadlines. It also describes suggested activities that may be undertaken to promote The Rotary Foundation during November — Rotary Foundation Month.

As you will discover, *The 2000-01 Rotary Foundation Handbook* provides a variety of Foundation information in a single resource. Many other Foundation publications, along with audio-visuals, are available for more detailed information on specific Foundation programs. A number of these tools are listed in Chapter 2 in the “Resources” section, which includes information on how to order them. Updated Foundation information can also be found in the Foundation section of Rotary International’s home page on the Internet (www.rotary.org).

NOTE: All dollar amounts mentioned in this handbook refer to US dollars.

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1 Overview

Rotary International and Its Foundation

Rotary International, founded in 1905, is now a network of nearly 1.2 million members in more than 29,700 clubs in 162 countries and 36 geographical regions. Members are business and professional leaders united in a commitment to the Object of Rotary (printed on the inside cover), exemplified in the motto, “Service Above Self.” The purpose of Rotary International is to provide service to both the clubs and the more than 500 Rotary districts into which they are organized.

Rotary programs fall into one of four “avenues” of service: Club Service, Vocational Service, Community Service, and International Service. Through these four avenues, programs are devised to serve youth, the elderly and the disabled, to promote literacy, to protect the environment, to encourage high ethical standards, and to advance international understanding and world peace.

Rotary International offers to clubs and districts a wide variety of activities: World Community Service, Youth Exchange, world fellowship activities, intercountry committees, Rotary Volunteers, and related programs. These activities are designed for district-to-district, or club-to-club, or even Rotarian-to-Rotarian interchange. Rotary offers even further opportunities within the avenue of International Service, which include a menu of programs that require worldwide support from Rotary clubs everywhere. These are the programs of The Rotary Foundation of Rotary International.

The Rotary Foundation offers opportunities for Rotary clubs and districts to combine their strengths and carry out larger service activities than would ever be possible at the individual club or district level. *It is because of the combined efforts of Rotarians worldwide that the Foundation can:*

- Offer one of the world’s finest and largest private international scholarship programs, sending 1,200 men and women to study abroad each year;
- Offer its Group Study Exchange program, which sends more than 2,000 men and women abroad each year to learn about life and culture in another country;

- Fund its Humanitarian Grants programs — Matching Grants, Helping Grants, Health, Hunger and Humanity (3-H) Grants, 3-H Planning Grants, Discovery Grants, and New Opportunities Grants — and its Peace Programs;
- Fund such efforts as the Rotary Grants for University Teachers, Grants for Rotary Volunteers, and Discovery Grants; and
- Mobilize the global drive that has made great strides in eradicating polio.

For legal and tax liability reasons, The Rotary Foundation is organized as a separate corporation. Like its parent, Rotary International, it is a not-for-profit corporation in the State of Illinois, USA, and is qualified for tax exemption under the laws of the USA. Contributions to the Foundation qualify for charitable tax deductions in the USA and other countries where such arrangements have been successfully negotiated. Unlike Rotary International, it has but a single avenue of service, international, and a single purpose: to support the efforts of Rotary International to achieve world understanding and peace through international humanitarian, educational, and cultural exchange programs.

The Rotary Foundation is a vital part of the whole of Rotary International — it gives Rotary clubs and districts the opportunity to join together in significant International Service activities.

A Brief History

Rotarians the world over readily recognize and identify the name of Paul P. Harris as the founder of Rotary International. Less well known, even to Rotarians, is the name of Arch C. Klumph. He, too, was an early president of Rotary International, the sixth, serving in 1916-17, and it was he who proposed to the 1917 Convention in Atlanta, Georgia, USA, the creation of an “endowment fund for Rotary . . . for the purpose of doing good in the world in charitable, educational, and other avenues of community progress.”

The proposal was successful, and the fund became a reality with receipt of its first contribution — \$26.50 from the Rotary Club of Kansas City, Missouri, USA. The gift represented the surplus of funds left over from the 1918 Convention in that city. It marked the beginning of what has now become a multimillion-dollar philanthropic enterprise. Following are some milestones in the history of Rotary International and The Rotary Foundation.

- | | |
|---------|---|
| 1905 | Rotary International founded by Paul P. Harris and a small group of associates. |
| 1917 | Arch C. Klumph, a founding member and sixth president of Rotary, proposes creation of an endowment fund. |
| 1928 | The fund grows to \$5,739, is given legal recognition and renamed The Rotary Foundation (TRF). Five trustees named to “hold, invest, manage, and administer” all of its property and, with approval of the RI Board of Directors, to “expend the corpus of the income therefrom, as a single trust, for the furtherance of the purposes of RI.” |
| 1929 | The US Stock Market crashes, ushering in the Great Depression and difficult times for The Rotary Foundation. |
| 1930 | The Rotary Foundation’s first grant — \$500 — is made to the International Society of Crippled Children. |
| 1939-45 | World War II hinders development of The Rotary Foundation. |
| 1947 | Paul Harris dies. He had requested that any memorial gifts be given to the then-dormant Rotary Foundation. Donations flooded in and, by June 1948, more than \$1 million had been contributed, nearly twice as much as over the previous 30 years. |

- 1947-48 The Foundation's first educational program begins — international graduate scholarships to enhance world understanding and peace, now known as Rotary Ambassadorial Scholarships.
- 1954-55 Contributions to the Foundation exceed \$500,000 annually.
- 1956 District governors begin appointing Foundation committees to assist in promoting The Rotary Foundation's objective and to serve as liaisons with the RI Secretariat.
- 1957 Paul Harris Fellow Recognition begins for donors giving at least \$1,000.
- 1964-65 Contributions to the Foundation exceed \$1 million annually.
Matching Grants program begins, then called Grants for Activities in Keeping with the Objective of The Rotary Foundation.
- 1965-66 Group Study Exchange (GSE) program begins, growing rapidly as an avenue for improving international understanding.
- 1978 Health, Hunger and Humanity (3-H) program created to help improve health, alleviate hunger, and enhance human and social development.
- 1979 Trustees approve \$760,000 grant for five-year polio immunization plan in the Philippines, which had experienced annual epidemics of the crippling disease.
Grants for Rotary Volunteers spawned by 3-H program; begins with medical and dental professionals donating their services in refugee camps in Southeast Asia before expanding to many other professions.
- 1981 The number of Trustees is increased to the current number of 13, providing for representation from each of the six geographical regions of the Rotary world.
- 1984-85 Contributions to the Foundation climb to \$24 million annually.
PolioPlus program officially becomes a separate Foundation program.
- 1985 RI Board of Directors adopts the goal of immunizing 500 million children in the developing world against polio, in the hope of helping to eliminate polio by the year 2000, with official certification in 2005, Rotary's 100th anniversary.
- 1990 Carl P. Miller Discovery Grants begin, subsidizing travel and related expenses for club and district representatives to investigate and plan International Service projects.
- 1993 At the RI Convention in Melbourne, Victoria, Australia, a child is immunized against polio, representing the 500 millionth child to receive vaccine through PolioPlus.
- 1994 Permanent Fund Initiative begins, expanding the Rotary Endowment and providing future earned income.
- 1995 Number of Paul Harris Fellows reaches 500,000.
- 1996 Number of contributors to the Foundation reaches one million.
- 1996-97 Helping Grants begin, providing a means for clubs and districts to undertake international humanitarian service projects in non-Rotary countries.
- 1997-98 50th anniversary of the Foundation's Educational Programs.
- 1998 Total contributions to the Foundation since its inception surpass \$1 billion.
- 1999 The Rotary Foundation celebrates the approval of the 10,000th Matching Grant. The 10,000 grants represent awards exceeding \$70 million to projects in 181 countries.

The Campaign to Eradicate Polio

The success of the 1979 Philippine polio immunization program inspired Rotarians to pursue an undertaking far more daring than anyone in Rotary had foreseen. In 1981, the special New Horizons Committee considered the fact that only 20 percent of the children in the developing world were being immunized against common communicable diseases. Members of the committee saw that mass immunization could provide a focal point for Rotary service worldwide. The RI Board of Directors adopted in 1985 the goal of immunizing all the children of the world against polio by providing a five-year supply of polio vaccine to any developing country upon request. By 1988, this goal was expanded to help eradicate polio by the end of 2000 with official certification coming in 2005, Rotary's 100th anniversary. The connection of the immunization plan to Rotary's centennial led to early designation of the project as "Polio 2005." Later, the name was changed to PolioPlus.

Administratively, polio immunization activities were a part of 3-H until early 1985 when the Foundation Trustees defined it as a separate program.

The first major public announcement of the program came on Rotary's 80th birthday in February 1985. A resolution adopted by the 1986 Council on Legislation put the collective will of Rotary International behind PolioPlus with an endorsement of its goal as "a humanitarian service effort of great significance to improving child health worldwide."

By 1988 Rotary had become a partner — along with the World Health Organization (WHO), the Pan American Health Organization (PAHO), the United Nations Children's Fund (UNICEF), the US Centers for Disease Control and Prevention (CDC), and the Task Force for Child Survival and Development — in the fight against polio.

In 1994, the Trustees appointed the International PolioPlus Committee (IPPC), which directs all regional and national PolioPlus committees, coordinates all PolioPlus elements, and recommends policies and strategies to the Trustees to achieve polio eradication.

With 100 million babies born in the developing world each year, it was calculated that \$120 million would be needed to provide the vaccines for five-year national immunization campaigns throughout the world. The many-tiered campaign structure built to achieve that monumental goal was unprecedented in Rotary's history. Inspired by the thought of protecting the world's children from dreaded disease, Rotarians enthusiastically began fundraising activities that were as wide-ranging as they were successful.

Funds above the original goal have enabled The Rotary Foundation to sustain and increase its support for immunization and to assist the greater goal of polio eradication. By 2005, Rotarians' contributions to the global polio eradication effort will be approximately half a billion dollars. As of 1 January 1999, the Foundation had committed \$372 million to help polio eradication efforts in 122 countries. Recent emphasis has been on supporting National Immunization Days (NIDs) and strengthening surveillance systems in polio endemic countries.

In all its programs, The Rotary Foundation is a link by which those dedicated to service are connected to persons in need. Building on the successful experience of PolioPlus, the Foundation continues to expand the opportunities for Rotarians to apply their generosity in new ways. The goal, however, remains the same: to achieve world understanding and peace through international humanitarian, educational, and cultural exchange programs.

Arch Klumph's vision is more fully realized with each successful year. The Rotary Foundation is becoming, as he believed it would, "a guarantee of Rotary's permanence and a beacon light leading us to broader fields of service."

Rotary Foundation Programs

The Rotary Foundation's mission is to support the efforts of Rotary International to achieve world understanding and peace. Its tools for helping to achieve those goals are humanitarian and educational programs and, of course, the thousands of Rotarians and non-Rotarian participants who successfully carry out those programs.

Whether it's a British surgeon traveling through the mountains of Peru to perform a sight-restoring operation on native peoples; or:

- An Indian Rotarian packing an ice chest with polio vaccine he will deliver to an immunization site;
- An Ambassadorial Scholar from the former East Germany telling a Rotary club in Australia what life was like behind the Iron Curtain;
- Group Study Exchange team members sharing the latest techniques of their professions with their international hosts;
- Children in Bangladesh enjoying fresh, clean water from a new well and the freedom from life-threatening waterborne diseases;
- Or any of the myriad possibilities Rotarians and others have in making a difference in people's lives using the tools the Foundation provides, it's the people behind Foundation programs who make these circumstances a reality.

The Rotary Foundation carries out its programs and program operations, fund development, and management on the basis of voluntary contributions and investment earnings on those contributions. No part of the per-capita dues paid by Rotarians to Rotary International supports the work of the Foundation.

Persons Eligible for Awards

The Trustees have agreed that, with the exceptions noted below, no award under programs supported by The Rotary Foundation will be made to a Rotarian, a Rotary employee, or a parent, grandparent, child, grandchild of a Rotarian or a Rotary employee, or their spouses. Rotarians and their relatives remain ineligible for Foundation awards for 36 months after a Rotarian has resigned from club membership.

While it is the Foundation's policy that those who contribute to the Foundation should not also be the beneficiaries of its programs, some Foundation programs *are open* to Rotarians. Rotary Grants for University Teachers, Grants for Rotary Volunteers, and Discovery Grants are available to Rotarians because these programs are based on offering volunteer service. Group Study Exchange team leaders also act in a volunteer service capacity, and therefore their transportation expenses are paid through the GSE program. Because these kinds of volunteer activities exemplify the Rotary ideal of "Service Above Self," the Trustees have agreed that Rotarians who serve in these programs are eligible for reimbursement from the Foundation for some expenses.

Educational Programs

Rotary Centers for International Studies in Peace and Conflict Resolution

Description

The Rotary Centers for International Studies in Peace and Conflict Resolution is The Rotary Foundation's newest educational programs initiative. Building on the strengths of the Ambassadorial Scholarships, the Rotary Centers for International Studies have been identified as a major educational priority for achieving the Foundation's mission for world understanding and peace in the new millennium. Seven Rotary Centers are being established in partnership with outstanding universities throughout the world. Beginning in 2002-03, 70 Rotary World Peace Scholars will be selected each year on a world-competitive basis for scholarships to study at one of the seven centers. The scholarships will be for two-year master's degree programs related to peace and conflict resolution. Included in the study period, Rotary Scholars will participate in an annual seminar developed by each university to review papers and discuss issues related to peace, goodwill, and world understanding to be reported to the Rotary world and the international media. Through these university partnerships, the Rotary Centers for International Studies will advance research, teaching, and knowledge on issues of peace, goodwill, causes of conflict, and world understanding among the next generation of community and world leaders.

- Funding the Rotary World Peace Scholars is a global Rotary effort. All districts are encouraged to contribute District Designated Funds in any amount to support Rotary World Peace Scholarships and to seek out and endorse a qualified scholarship candidate from their area. Districts which allocate from their District Designated Funds the full \$50,000 needed to support a scholar selected to study at the Rotary Centers for the 2002-04 or 2003-05 years will be recognized as Rotary Centers Pioneer Districts. Pioneer Districts will receive recognition to include a large banner for presentation at district conferences; a certificate and letter of appreciation from The Rotary Foundation Trustee Chairman; the district number engraved on a Rotary Centers Pioneer Districts plaque housed permanently at RI World Headquarters; and public recognition at international Rotary events.
- The Rotary World Peace Scholarships will cover transportation, tuition and fees, room and board, and other specified expenses for the two-year program.
- The Rotary Foundation Trustees have committed \$2 million to support the cost for the seven centers for a minimum of six years.

Criteria

- Candidates for Rotary World Peace Scholarships must have the requisite training, academic background, and significant work experience in relevant fields as required by the university partners for admission into one of the Rotary Centers master's degree programs. In addition, candidates must be proficient in more than one language, have excellent leadership skills, and have a demonstrated commitment to peace and international understanding through their personal and community service activities and/or academic and professional achievements.
- Candidates will study at one of the centers in a country other than their own. Final admission decision will rest with the university.
- Applicants *cannot* be a Rotarian; an Honorary Rotarian; an employee of a club, district, or other Rotary entity or of Rotary International; a spouse, lineal descendant (child or grandchild by blood or legal adoption), a spouse of a lineal descendant, or an ancestor (parent or grandparent) of any living person in the foregoing categories.

Rotary World Peace Scholarships Application Process

APPLICATION STEP	2002-03	2003-04
Application materials distributed to districts	November 2000	November 2001
Districts distribute applications and submission deadline information to clubs	Dec. 2000-Feb. 2001	Dec. 2001-Feb. 2002
Applications due to clubs from scholarship applicants	Deadlines set by clubs in accordance with district deadline — generally no earlier than March 2001 and no later than July 2001	Deadlines set by clubs in accordance with district deadline — generally no earlier than March 2002 and no later than July 2002
Club-endorsed applications due to districts	Deadline set individually by districts	Deadline set individually by districts
District-endorsed applications due at World Headquarters	1 October 2001	1 October 2002
Applicants chosen by Rotary World Peace Scholars Selection Committee and approved by the Trustees will receive notification of award and Rotary Center study assignment	15 December 2001	15 December 2002

For more detailed information, see *Rotary Centers for International Studies* on pages 76-77.

Ambassadorial Scholarships

Description

Ambassadorial Scholarships is the oldest program of The Rotary Foundation — a tradition of excellence dating to 1947. Contributions from Rotarians around the world currently support approximately 1,200 scholars from some 60 different countries for study in another country every year. These generous contributions are an investment in today's students. They represent Rotary's faith that these promising scholars will become tomorrow's leaders and will make substantial contributions to both their communities and to the world.

- **Academic-Year Ambassadorial Scholarship:** covers transportation, tuition, fees, room and board for one academic year of study in another country.
- **Multi-Year Ambassadorial Scholarship:** defrays the costs of degree-oriented study in another country for two or three years.
- **Cultural Ambassadorial Scholarship:** covers three or six months of intensive language training and cultural immersion in another country.
- **Japan Ambassadorial Scholarship Pilot Program:** available as a *SHARE* option for Japanese districts only to donate to other Rotary districts to bring more Ambassadorial Scholars to Japan for 12 months of intensive Japanese language study with the possibility of a concurrent internship.

Criteria

- Applicants must have completed at least two years of university or college coursework, or must have a secondary school education and have been employed in a recognized vocation for at least two years when the scholarship begins.
- In general, all applicants must be citizens of a country in which there is a Rotary club.
- Rotaractors are eligible and encouraged to apply.
- Applicants *cannot* be a Rotarian; an Honorary Rotarian; an employee of a club, district or other Rotary entity or of Rotary International; a spouse, lineal descendant (child or grandchild by blood or legal adoption), a spouse of a lineal descendant, or an ancestor (parent or grandparent) of any living person in the foregoing categories.

Ambassadorial Scholarships Application Process

APPLICATION STEP	2001-02	2002-03
Application materials distributed to districts	November 1999	November 2000
Districts distribute applications and scholarship availability information to clubs	Dec. 1999-Feb. 2000	Dec. 2000-Feb. 2001
Applications due to clubs from scholarship applicants	Deadlines set by clubs in accordance with district deadline — generally no earlier than March 2000 and no later than 15 July 2000	Deadlines set by clubs in accordance with district deadline — generally no earlier than March 2001 and no later than 15 July 2001
Club-endorsed applications due to districts	Deadline set individually by districts	Deadline set individually by districts
District-endorsed applications due at World Headquarters	1 October 2000	1 October 2001
Applicants approved by the Trustees will receive confirmation of award and study institution assignment	15 December 2000	15 December 2001

For more detailed information, see *Ambassadorial Scholarships* on pages 78-83.

Rotary Grants for University Teachers

Description

Rotary Grants for University Teachers began in 1985-86 as a pilot program to promote international understanding, blending two of Rotary's most important emphases: volunteer service and education. The purpose of the Rotary Grants for University Teachers is to build international understanding and development while strengthening higher education in low-income countries. Flat grant amounts are provided for three to five months of service or six to ten months of service.

Criteria

- Rotarians and non-Rotarians are eligible to receive a University Teacher Grant provided they have three years of full-time teaching experience in higher education. Rotarians are eligible to receive funding from the Foundation for this program because they are providing a service.
- Generally, the applicant's home and prospective host countries must contain at least one Rotary club.
- Rotary University Teachers shall teach an academic field of practical use to the people of the host country and contribute to the socioeconomic development of that country.
- Candidates must be proficient in the language of their prospective host country.

Rotary Grants for University Teachers Application Process

APPLICATION STEP	2001-02	2002-03
Application materials distributed to districts	November 1999	November 2000
Districts distribute applications and grant availability information to clubs	Dec. 1999-Feb. 2000	Dec. 2000-Feb. 2001
Applications due to clubs from applicants	Deadline set by clubs in accordance with district deadline — generally no earlier than March 2000 and no later than 15 July 2000	Deadlines set by clubs in accordance with district deadline — generally no earlier than March 2001 and no later than 15 July 2001
Club-endorsed applications due to districts	Deadline set individually by districts	Deadline set individually by districts
District-endorsed applications due at World Headquarters	1 October 2000	1 October 2001
Applicants approved by Trustees will receive confirmation	15 December 2000	15 December 2001

For more detailed information, see *Rotary Grants for University Teachers* on pages 83-86.

Group Study Exchange

Description

The Group Study Exchange (GSE) program is a unique cultural and vocational exchange opportunity for young business and professional men and women in their initial years of professional life. Teams spend four to six weeks abroad where they study their host country's institutions, economy, and lifestyles; observe their own professions in that country; and discuss ideas with local citizens while developing friendships.

Group Study Exchange Variations

- **Additional Team Members.** Up to two additional non-Rotarian team members may be added to the team through an allocation of *SHARE* DDF (in the amount of \$2,000 per additional team member or \$1,000 per additional team member on Neighboring Country GSE).

- **Specialized GSE.** Team variations may include single-vocational and cultural teams as well as those which focus on a topic of mutual interest, such as Literacy or Drug Abuse Prevention. Districts may also combine their efforts to form joint-district teams.
- **Neighboring Country GSE.** An exchange between two districts that have a common border or exist in close proximity. Districts may participate in an exchange with their neighbors at a greatly reduced *SHARE* DDF cost.
- **Exchange with Non-Rotary Countries.** Districts may use DDF to allow a team from a non-Rotary country to participate in a GSE on an exception basis and with Trustee approval. The DDF cost will be the same as for a regular GSE, \$11,000.
- **Humanitarian GSE.** Districts select team members with expertise to identify humanitarian projects in the district to be visited. Upon return, they assist sponsor clubs to develop Foundation grant proposals or World Community Service projects.

Criteria

Except as noted, criteria apply to *all* GSE programs.

- One annual GSE per district may be applied for through the World Fund (WF).
- A second GSE may be applied for through *SHARE* District Designated Funds at a DDF cost of \$11,000. Funds allocated for second Group Study Exchanges are pooled to support travel of all second exchanges. In the event that surplus funds are generated from second exchanges, these will be contributed to the World Fund.
- Teams will be comprised of four non-Rotarians (professional or business people) aged 25 to 40 and a Rotarian team leader.
 - Spouses are not allowed to travel with or participate on the same Group Study Exchange team.
 - Team leaders may *not* include district governors, district governors-elect, or immediate past district governors. Past district governors may serve as team leaders, provided that there has been an open selection process offering this leadership opportunity to district Rotarians and where special requirements of the exchange, such as language, vocation, or other needs, result in the past district governor being chosen as the best qualified candidate.
- GSE District Application must be received no later than 1 October of each Rotary year. Failure to submit an application by this deadline greatly reduces your district's likelihood of receiving a pairing for the coming program year.
- Team member applicants must live or work in the sending district, currently be employed in a recognized business or profession on a full-time basis, and be 25 to 40 years of age to fulfill the rigorous and extensive demands of international travel and active participation in multi-week activities that will enable the experiences to have a maximum impact upon their long-term careers.
- Hosting district is responsible for providing at least five vocational study days *per* team member (approximately 20 study days per team). Vocational study days must be tailored to match the professions of the individual team members.
- Paired districts exchange teams between 1 July and 30 June of the award year, unless both paired districts specifically request that the exchange be completed over two years rather than one.

GSE Application Process

APPLICATION STEP	DATES
Applications sent to districts	July-August
Applications due at World Headquarters	1 October
Districts receive confirmation of pairing(s)	January
Team Member and Team Leader applications sent to districts	May

For more detailed information on Group Study Exchange, see *Specific Program Information* on pages 87-92.

Humanitarian Programs

The Rotary Foundation's Humanitarian Grants Programs support a wide range of international service activities. Rotary clubs and districts worldwide are encouraged to use Humanitarian Grants as tools to help them fund their International Service projects, which combat hunger, disease, ignorance, and poverty. The grants programs are designed to bring Rotary clubs and districts together in an international partnership, which fosters and nurtures an understanding between different cultures.

A prerequisite for Rotary Foundation grant support — whether through Matching Grants, 3-H, or other programs — is that a project must be “international.” To be considered international, a project must involve active participation by a reasonable number of Rotarians in the benefiting country and at least one other country. With this in mind, the following suggestions are offered to Rotary clubs and districts for finding an international partner for a service project.

Finding an International Partner for a Rotary Service Project

1. District governors-elect (DGEs) will have the opportunity to develop project partnerships during the projects fair which occurs during the International Assembly. The district governor-elect should be briefed before attending the International Assembly on potential projects that the district or its clubs would like to implement. This information will allow the DGE to pursue the interests of clubs and the district while speaking with other DGEs at the Assembly about the possibility of working together on a project.
2. Also at the International Assembly, as well as at the International Convention, there is a “Projects Seeking International Partners Bulletin Board” which is available to districts/clubs that are looking for financial support to post their project information. Clubs and districts that are looking for projects to support financially (either directly or through the Matching Grants program) utilize this bulletin board to locate specific projects.
3. Rotarians from the district who plan to attend the International Convention should be aware of potential projects for which the district or clubs in the area might be seeking international participation. During the convention, the local Rotarians can discuss the possibilities for project collaboration with other convention participants.
4. If a club is part of a multi-country district, club members may be able to find an international partner for a potential project at their own District Conference.
5. Group Study Exchange visits provide opportunities to explore further cooperative activities, such as joint International Service projects.

6. Register a project with the *World Community Service (WCS) Projects Exchange*, designed to facilitate project contacts between clubs and districts in different parts of the world. Clubs can register a project by submitting a completed *WCS Project Data Form (784-EN)*, which can be obtained from World Headquarters and RI service centers. Registered projects are included in the *WCS Projects Exchange (754-EN)*, which is updated twice a year. The *Projects Exchange* listing is also posted on the RI Web site — www.rotary.org — where it is updated every two months.
7. Request that the project be provided with a list of available international Rotary Volunteers through the Rotary Volunteers program. The need for Rotary Volunteers should be substantiated by the submission of a specific plan for their use.
8. Seek international partners through business contacts and business or personal travel. When traveling abroad, Rotarians who attend make-up club meetings are presented with a good opportunity for discussing their projects with Rotarians from other countries.

Making Effective Use of an International Partner

Once an international partner has been secured, it might be difficult to envision how Rotarians from outside a benefiting country can responsibly and usefully participate in potential projects that may be thousands of kilometers away. A financial contribution is important but, in many cases, Rotarians will want to do more. This is especially true of many projects for which Rotary project management may be predominantly local. To participate in service projects in another country, the following suggestions are offered:

1. Rotary clubs or districts in different countries may participate in designing a service project and in projecting the budget.
2. Rotarians from cooperating clubs or districts outside the benefiting country can volunteer their time and expertise to a project. If Rotarians are able to provide direct service for four to eight weeks at the project site, then they may be eligible to receive a subsidy towards round-trip transportation and living expenses through the Grants for Rotary Volunteers program.
3. Sustainable development projects tend to have ongoing supply and material needs beyond those met by any funds that the Trustees of The Rotary Foundation might grant to a project. These ongoing needs can be met by Rotary clubs or districts in different countries through donations of money or goods which can be managed in various ways. Clubs and districts, for example, can sponsor some creative types of fundraisers. If the project site is in Brazil, for example, a US district might hold a “Brazilian Carnival Night,” after which the proceeds are used to purchase and ship materials and supplies for the project. International contributions may also qualify for matching funds through the Matching Grants program.
4. Rotary clubs or districts in different countries may act as liaisons between Rotarians and any non-Rotary service organizations and/or governmental agencies that may be participating in the project.

The following pages offer summaries of the purpose, criteria, and application processes of the Humanitarian Grants Programs. Please refer to Chapter 5 for more specific information.

Discovery Grants

The purpose of Discovery Grants is to subsidize the advance planning activities of Rotary clubs and districts designing International Service projects by contributing to the travel, food, and ancillary expenses of individuals selected by the sponsor club or district to travel from one country to another to further such planning. There are two funding mechanisms for Discovery grants: the Carl P. Miller Endowment and District Designated Funds (DDF). The table below provides a basic general description of the similarities and differences between the two mechanisms for funding Discovery Grants.

FUNDING MECHANISM	CARL P. MILLER ENDOWMENT	DISTRICT DESIGNATED FUNDS (DDF)
Criteria	Same	Same
Application required?	Yes	Yes
Competitive?	Yes	No
Funding Priorities?	Yes	No
Deadlines?	Yes	No
Grant Ceiling?	\$3,000	\$5,000

Discovery Grants Funded Through the Carl P. Miller Endowment

Description

This grant provides up to \$3,000 (once per six-month period) to a Rotary club or district to help cover travel and related expenses to carry out the planning necessary to continue or finalize future plans for an International Service project. Carl P. Miller Discovery Grants are funded by interest earned on a \$1 million endowment left by Past RI President Carl P. Miller and his wife, Ruth.

Discovery Grants Funded Through District Designated Funds

Description

Rotary districts may fund Discovery Grants using their District Designated Fund (DDF). These grants — called simply Discovery Grants as opposed to Carl P. Miller Discovery Grants — are noncompetitive and there is no application deadline although applicants must still meet all the program criteria and submit the required completed application. The award ceiling for *SHARE*-funded Discovery Grants (\$5,000) differs from the award ceiling for Carl P. Miller Discovery Grants (\$3,000).

Criteria for Discovery Grants

Projects must:

- demonstrate active international Rotarian participation, meaning that at least one Rotarian must participate in the planning mission.
- have a written invitation from a Rotary club or district officer from the cosponsoring club or district promising home hospitality or an explanation of why that is not feasible.
- take place after formal announcement of grant approval. Applications for planning missions that have already taken place are **not** eligible to receive funding.

- be distinct, i.e., of a different type or category from any other planning mission for which the applicants have already received a Discovery Grant within the past five Rotary years.
- require that cosponsors complete all reporting requirements before applying for future Discovery Grants.
- take place within nine months of approval; if not, the grant will be withdrawn.
- include contact person information and an invitation letter from the cooperating organization that will act as host for planning missions to areas where the local Rotary club cannot provide significant involvement or in a non-Rotary country. In these cases, home hospitality is not required from the cooperating organization.

Projects may:

- allow the replication of successful projects that benefit different communities, but does not permit the duplication of projects.
- fund planning missions taking place in the sponsor country instead of within the project country. Those applications must:
 - include a clear explanation of why the planning would be more effective in the sponsor country rather than in the project country; and
 - show strong evidence of the host Rotary club/district's commitment to the proposed project.
- be awarded to fund separate applications for the same planning mission if two separate districts apply.

Projects must not:

- fund the planning missions of clubs or districts that have received more than one *SHARE*-funded Discovery Grant during the previous six-month period.
- be used for expenses to attend a professional meeting or conference, fund the establishment of a sister club/district relationship, or support fundraising activities of a club or district.

Funding Priorities for Carl P. Miller Discovery Grants

- Carl P. Miller-funded grants give priority to projects with the following characteristics:
 - potential for becoming an international/World Community Service project;
 - makes maximum use of funding; appropriate number of team members;
 - possibilities for active Rotary involvement and identification;
 - initial groundwork completed; local investigation capabilities exhausted;
 - investigation and/or planning is for a specific project;
 - unique program content.
- Low-funding priority will be placed on applications with the following characteristics:
 - duplicates the mission of a project for which sponsors have previously received a Discovery Grant;
 - proposes travel to another country to find an international project cosponsor; or
 - intends to plan for submission of a 3-H project application.

- An application is ineligible for a Carl P. Miller Discovery Grant if its purpose is to:
 - help establish a sister club/district relationship;
 - serve as a fundraising activity;
 - attend a meeting or conference.

Important Points for Clubs and Districts

- The application must be accompanied by a letter of invitation and home hospitality from the host Rotary club/district. This letter must specifically state that the hosting Rotary club/district will offer home hospitality or why it is unable to offer it.
- Applications which show that prior planning and communication have taken place between the two Rotary clubs/districts involved have a greater likelihood of being approved. Do not wait until just before the application deadline to contact a participating Rotary club.
- If a district utilizes DDF allocated for Discovery Grants, the applications will be reviewed throughout the year. Applications for the competitive Carl P. Miller Discovery Grants are only reviewed two times per year — application deadlines are 1 July and 1 January.
- The Discovery Grant mission should be to plan for a Rotary project with Rotary identity and not just a project of another organization.
- Carefully consider the number of team members who will participate in the Discovery Grant mission. Ensure that each member has a specific role to play.

Application Process for Carl P. Miller Discovery Grants (Two Award Cycles)

APPLICATION STEP	SUBMISSION DATES	SUBMISSION DATES
Complete Application	1 January	1 July
Funding Decision	15 February	15 August
Planning Mission	15 February to 31 December	15 August to 30 June

Application Process for DDF Discovery Grants

For applications funded by a district’s DDF only, there is no deadline; applications are considered on a rolling basis.

For more detailed information on *Discovery Grants*, see pages 99-102.

Grants for Rotary Volunteers

Description

The Grants for Rotary Volunteers program offers individual Rotarians an opportunity to serve when it might not be otherwise financially feasible, by providing subsidies for volunteer service. The primary objective is for volunteers to assist in those areas of the world that require expertise in raising their basic standard of living.

Currently, each grant provides a partial subsidy to help cover expenses for four to eight consecutive weeks of International Service by Rotarians, Foundation alumni, Rotaractors, and non-Rotarians, subject to Trustee approval, when they serve in an approved Rotary project. The standard provision of the grant is the lowest economy-class round-trip airfare and up to \$50 per diem (subject to available funding). *In addition to the regular Grants for Rotary Volunteers program, the Trustees have approved a three-year pilot plan for Long-Term Rotary Volunteer Grants, which began in 1998-99. Long-term volunteer costs will be funded by DDF at \$20,000 per volunteer. The district is responsible for selecting and preparing the long-term volunteer and for*

designating funds. The volunteer must serve for one year and perform direct service to those in the host Rotary club’s site while training others to carry on his/her work.

Criteria

- Any Rotarian, Foundation alumnus, or Rotaractor is eligible. Non-Rotarians are subject to Trustee approval and must not exceed 20 percent of the volunteer budget.
- Requires a letter of invitation to the volunteer, outlining the volunteer activity and service dates, from the Rotary club nearest the project site.
- Service term is a minimum of four weeks; Long-Term Rotary Volunteer Grants require a service term of one year.
- The volunteer must submit a report to the Foundation within 30 days of service, and address local clubs and community groups regarding service experience.

Pre-Application Process

- **Participants (Rotarians, Rotaractors, Foundation alumni, and non-Rotarians) must register with the RI Volunteers program by completing and submitting the Rotary Volunteers Registration Form. *The Rotary Foundation does not place volunteers.***
- **Locate a service site** (either through the *Rotary Volunteers International Site List [279-EN]*, or on your own through a nonprofit organization or a Rotary club or district in another country).

Application Process for Grants for Rotary Volunteers

APPLICATION STEP	DATES FOR SUBMISSION
Complete and submit: 1. a Grants for Rotary Volunteers Application; 2. a letter from the Rotary club in the area of service, affirming the need for the volunteer’s service and service dates; 3. a curriculum vitae.	At least six weeks prior to the volunteer service term will begin. Volunteers wishing to complete their service terms during the first two months of the Rotary year should contact the Rotary Volunteers staff member at the Foundation.

For more detailed information on *Grants for Rotary Volunteers*, see pages 105-107.

Health, Hunger and Humanity (3-H) Grants

Description

Health, Hunger and Humanity (3-H) Grants fund long-term, self-help grass-roots development projects which are too large for one club or district to implement on its own. 3-H Grants range from \$100,000 to \$500,000 paid out over two to five years.

Criteria

- Projects must provide significant long-term benefits of a self-help nature to a large number of people.
- Projects must be self-sustaining after the 3-H Grant funds have been expended.
- 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.

- The projects must be clearly identified with Rotary and initiated, controlled, and implemented by Rotarians.
- Rotarians must contribute 10 percent of the 3-H Grant total (up to a maximum of \$25,000) before any portion of the grant can be disbursed.

3-H Grant Application Process

APPLICATION STEP	DATES FOR SUBMISSION
Preliminary Proposal	1 January or 1 July
Staff Review	Within one month (approximately)
Complete Application	15 March or 15 September
Funding Decisions Announced	Following October/November or April/May Trustee Meeting

Description

3-H Planning Grants are awarded to proposed projects which meet all 3-H criteria but could be developed on a larger scale or could make a larger impact with preliminary funding. The grant may be used to offset such planning costs as feasibility studies, international and local travel, basic meeting costs, and essential materials. Grants are awarded for up to \$20,000.

Criteria

Same as for 3-H Grant.

3-H Planning Grant Application Process (Two Award Cycles)

APPLICATION STEP	DATES FOR SUBMISSION	DATES FOR SUBMISSION
Preliminary Proposal	15 February	15 August
Staff Review	Within one month (approximately)	Within one month (approximately)
Complete Application	1 May	1 November
Funding Decisions Announced	30 June	31 December

For more detailed information on *3-H Grants*, see pages 103-105.

Helping Grants

Description

Helping Grants provide funds for very worthy humanitarian International Service projects in non-Rotary countries and/or where the local Rotary club, due to either inaccessibility or distance from the project site, cannot provide significant Rotarian involvement and oversight. Therefore, Helping Grant projects must be initiated, sponsored, and monitored by a Rotary club or district (outside of the country where the project will take place). That club or district must assume full leadership and responsibility for the project.

These projects are similar to Matching Grant projects; however, significant participation by local Rotarians is either limited or impossible. Based on a 50 percent match of club/district contributions, the maximum grant amount is \$15,000.

Criteria

- No more than eight Helping Grant projects conducted with a single cooperating organization will be awarded each Rotary year. Applications for projects conducted with a single cooperating organization will be approved on a first-come, first-served basis.
- District Designated Funds allocated to the Humanitarian Programs Category may be used as the district's sponsor portion of a Helping Grant. The Foundation will match 50 percent, up to \$15,000, *if* the grant request is approved.
- Individual travel expenses will be funded only if the travel is integral to the project's success. Travel costs are limited to 10 percent of the project's budget.
- If the project will take place in a Rotary country, the local club must send written endorsement of the project and state the limitations which limit or prevent active project involvement.
- Funding for construction of individual family shelters is allowed. The cost of each shelter cannot exceed more than \$2,000 in order to receive a Foundation grant. *All other types of construction are prohibited.*

Important Points for Clubs and Districts

- The project must have Rotary identification, even if it will take place in a non-Rotary country.
- The sponsor Rotary club/district must be willing to oversee and monitor the project.
- The sponsor club/district must ensure that the application form is fully completed and that all information requested is submitted.
- Do not forward any funds to The Rotary Foundation unless/until a grant is approved. Funds sent to the Foundation before a grant is approved will delay the payment process.
- Sponsor contributions (non-*SHARE*) are eligible for Paul Harris Fellow Recognition.

Application Process

Applications are considered on a rolling basis.

For more detailed information on *Helping Grants*, see pages 107-110.

Matching Grants for International Humanitarian Projects

Description

Matching Grants assist Rotary clubs and districts in carrying out humanitarian International Service projects in cooperation with Rotarians in another country. Matching Grants are *tools* for Rotarians to use to complete humanitarian service projects. Each project represents a *partnership* between Rotarians in different countries. The Foundation provides *up to* a one-to-one *match* of club and district funds (maximum award — \$50,000).

Criteria

- Grants are awarded to help provide for humanitarian projects that benefit the economically disadvantaged.
- Grants *cannot* be used for the purchase of land or substantial buildings* (whether existing or under construction), salaries, and/or the operational or administrative expenses of any organization.

- Grant funds may be used for individual travel expenses only when such travel is essential for the project's success. Travel costs are limited to 10 percent of the project's budget.
 - Contributions must be at least equal to the amount being requested from The Rotary Foundation. In addition, at least half of the contribution must be made by the club/district outside the project site country.
 - Funding will be provided for upcoming projects only, pending review and approval by the Foundation Trustees.
 - The project must involve active, personal Rotarian participation. Club members of both the **local club/district** in the **project country** and **international sponsor** country must commit to actively assist with the project's implementation.
 - If the project will be conducted in cooperation with a non-Rotary organization, the Rotary sponsor must clearly demonstrate that the project is initiated, controlled, and conducted by Rotary and must provide for visible Rotary identification. The non-Rotary organization must be reputable and responsible, and must agree to participate and cooperate fully in all related financial review activities. No more than eight Matching Grant projects conducted with a single cooperating organization will be awarded each Rotary year. Applications for projects conducted with a single cooperating organization will be approved on a first-come, first-served basis.
 - Grants of \$25,000 and under are considered on a first-come, first-served basis. Grants exceeding \$25,000 are **competitive**.
 - Applicants who show the most Rotarian involvement, **particularly involvement demonstrated by a financial commitment**, in both the project and international countries will receive special consideration.
 - Travel related to seminars, conferences, and international exchanges will not be funded.
- * Under the Foundation's Humanitarian Grants programs, construction of shelters for underprivileged family units is allowed on a three-year pilot basis until 30 June 2000. (Please contact Foundation staff for additional information after this date.) Funding is only available through existing Foundation grant programs: Matching Grants, 3-H Grants, and Helping Grants. In order to receive funding for construction of such shelters through these grants, all existing guidelines of the appropriate program must be met plus additional guidelines established specifically for such construction. The Foundation will not award grants for shelters that exceed \$2,000 in cost. For further details, see "Shelters for Underprivileged Families" on page 98.

Important Points for Clubs and Districts

- Read *A Guide to Matching Grants for International Humanitarian Projects* (144-EN) **carefully**. This publication walks you through the process of applying for a grant and implementing the project.
- Answer **all** questions as requested on the Matching Grants Application (141-EN). All of the information requested on the application has been determined as necessary by The Rotary Foundation Trustees. Failure to provide any of the information requested will significantly delay Trustee consideration of the grant request.
- Each project should be a **joint partnership** between at least two cooperating clubs/districts. A Matching Grants project should not be a project of one club with minimal involvement of another. If there is no local (project country) club involvement, consider the Helping Grants program.
- Ensure that you have project contacts who are able and willing to stay in close communication with the other sponsor country's contacts. This includes the ability to speak the other sponsor's language.

- Be patient. Communication between different countries may be difficult. Projects do take time to develop and implement.
- Stay in frequent contact with the other clubs involved in the Matching Grants project. Ensure that all are kept up-to-date.
- Do **not** forward any funds to The Rotary Foundation unless a grant is approved. Funds that are sent to the Foundation before a grant is approved will delay the payment process, and there is a risk that they may not be available at the time of grant approval.
- Once a grant is approved, any changes to the project which deviate from what was originally presented to the Foundation Trustees must be approved by the Foundation in writing prior to their implementation.
- From the outset of the project, keep a detailed account as to how the grant funds are and will be spent. You will be required to submit interim and final reports to The Rotary Foundation. Also, projects are randomly audited on an annual basis.
- If you are unsure as to whether your project would qualify for a Matching Grant, contact the Matching Grants staff before you complete an application.

Deadlines

Grant requests of \$25,000 and under are considered on rolling basis throughout the year.

Grant requests of \$25,001 to \$50,000 will be considered twice a year at October/November and March/April Trustee meetings, **on a competitive basis**. Deadline for receipt of **complete** grant requests — 1 August and 1 January.

For more detailed information on *Matching Grants*, see pages 95-98.

New Opportunities Grants

Description

New Opportunities Grants provide a window of opportunity for districts to receive funding from The Rotary Foundation for World Community Service and other international activities. Funded through the District Designated Fund (DDF), New Opportunities Grants provide districts with the freedom to design service projects which are new and unique and allow districts to use their DDF for those projects which do not meet all the eligibility criteria of existing Foundation programs.

Criteria

- The scope of the project must fall within the mission of The Rotary Foundation and meet Rotary ideals.
- The project must have demonstrable humanitarian benefits and meet a demonstrated need.
- The project must be international in scope, i.e., the DDF must be used for a project in a country other than the district's own. (NOTE: Exceptions could be made for projects within multi-country districts.)
- The DDF awarded may not be used for the purchase of land or buildings or the construction of substantial buildings (i.e., any structure in which people will live, work, or spend a great deal of time each day).
- The project must not directly benefit a Rotarian; an employee of a club, district, or other Rotary entity, or of Rotary International; or a spouse, lineal descendant, spouse of a lineal descendant, or an ancestor of any living Rotarian or Rotary employee.

- The project must *not* duplicate an existing Rotary Foundation or Rotary International program.
- The project must exclude any liability of The Rotary Foundation or Rotary International except for the amount of the DDF grant.
- The project must include significant Rotarian involvement in either the sponsor or recipient district.
- The grant may not be used to provide funding to another organization or its program/project.
- The project must be distinct (i.e., of a different type or category) from any other projects for which the same applicants have already received a grant in the past. (This does not prevent the replication of successful projects that benefit different communities/people.)
- The grant may be used to fund short-term volunteers providing specific and direct service in another country.

Important Points for Districts

- Each district may apply for up to three New Opportunities Grants per year;
- The DDF grant amount per New Opportunities Grant must be between \$1,000 and \$10,000;
- Districts may not combine New Opportunities Grants to fund one larger project;
- Project length must be no longer than one year;
- A district may have only two New Opportunities Grants approved simultaneously. Payment for a subsequent New Opportunities Grant may not be released until the final report and financial records for a previous grant have been submitted.

2000-01 Application Process

To be eligible for a New Opportunities Grant, the district must have allocated a portion of its DDF to the Humanitarian Programs Category under the *SHARE* system in an amount at least equal to the grant amount requested. Applications must be submitted by the district governor or governor-elect (whoever will serve during the year in which the project will take place).

For more detailed information on *New Opportunities Grants*, see pages 110-112.

Rotary Peace Programs Grants

Description

The Rotary Peace Programs are designed *to support conferences and other activities which promote cooperation, goodwill, and development*. The program provides grants of up to \$25,000 for the purpose of utilizing the worldwide membership, programs, and resources of Rotary to:

- Achieve greater knowledge of the issues that enhance cooperation between nations;
- Cultivate goodwill and peaceful understanding among people; and
- Promote economic and human development.

Grants may be awarded for activities other than conferences. However, funded programs must include a plan for follow-up activities which may utilize other programs of RI and The Rotary Foundation.

Criteria

- Events should be self-supporting in a substantial manner, and funding should be requested only for the balance that will not be covered by registration fees and local funding.
- Subject matter must be of broad human concern, extending beyond the institutional or personal benefit of Rotary and its membership.
- Activities must involve understanding and cooperation among people of two or more nations and have subject matter relevant to the particular geographic area in which the program is held.
- Events must have significant attendance from all countries involved.
- Programs must have the endorsement of the current RI Director or Rotary Foundation Trustee representing the zone or alternating zone.
- Program sponsors must ensure that there is appropriate government support to facilitate the involvement of all participants.

Past Grants Awarded

- Rotary International Peace Forum for Young People, Sydney, Australia, 1997
- Rotary South Asia Conference of Cooperation and Development, Kathmandu, Nepal, 1996
- Population and Development, Dakar, Senegal, 1995
- The International Peace Festival for Children, Lillehammer, Norway, 1993
- US/Mexico Border Issues, San Diego, California, USA, 1993

Application Process (Two Award Cycles)

APPLICATION STEP	DATES FOR SUBMISSION	DATES FOR SUBMISSION
Complete Application	1 February (at least one year before program date)	1 August (at least one year before program date)
Funding Decisions Announced	After March/April Trustee meeting	After October/November Trustee meeting

For more detailed information on *Peace Programs Grants*, see page 112.

PolioPlus Program

Description

PolioPlus grants provide polio vaccines and surveillance supplies and activities, and mobilize community resources in support of international efforts to eradicate polio worldwide. By 2005, Rotarians' contributions to the global polio eradication effort will be approximately half a billion US dollars. In addition, millions of dollars worth of in-kind and personal contributions have been made by and through local Rotary clubs and districts. Of even greater significance are the hundreds of thousands of volunteers at the local level who provide support at clinics or mobilize their communities for immunization against polio. More than one million Rotarians worldwide have contributed to the success of the polio eradication effort.

PolioPlus grants are made for special eradication activities in selected countries where the government, the World Health Organization (WHO), UNICEF, Rotary, and other donor agencies have drawn up a cooperative plan showing their respective roles, support, and activities. PolioPlus funds are used to help eradicate polio in the most efficient and direct manner, including vaccine and operational costs for National Immunization Days (NIDs), laboratory support, and additional social mobilization and surveillance activities specifically directed to the final stages of polio eradication.

What You Should Know

- **PolioPlus Partners Program** enables all Rotarians to join in the battle to eradicate polio. The purpose of PolioPlus Partners is to help Rotarians in polio-endemic regions obtain the tools and supplies necessary for polio eradication by targeting critical needs, including:
 - social mobilization for NIDs;
 - support for activities that monitor the transmission of the polio virus;
 - surveillance; and
 - assistance to polio medical officers/epidemiologists.
- **Advocacy for PolioPlus** describes the Rotarian activities that communicate to leaders at global, national, and local levels the benefits of polio eradication by the end of 2000, so that financial, technical, and other resources required to reach this goal will be committed on a timely basis. Through advocacy, Rotarians seek to:
 - inform funding sources in potential donor nations of the urgency to make special contributions to the unmet needs of polio eradication programs in polio-endemic countries;
 - urge leaders in polio-endemic countries to maintain the highest possible level of routine immunization against polio and all vaccine-preventable diseases; and
 - inform the general public about the benefits of polio eradication to obtain their support for this goal and all programs which combat vaccine-preventable diseases.

General Criteria

Contact your **National** or **Regional PolioPlus Committee** chairperson who is listed in the current *Official Directory*.

Application Process

Contact your **National** or **Regional PolioPlus Committee** chairperson.

Program Success Stories

- In India, Rotarians played a major role in mobilizing over 150,000 volunteers to transport the oral polio vaccine and assist doctors, health workers and other non-governmental organizations during NIDs that reached nearly 130 million children in January 1999.
- In both Bulgaria and Romania, Rotarians convinced the gypsy community to participate in NIDs, despite traditional distrust of government programs.
- As a result of the efforts of Rotary International and its Foundation and those of governments and our partners over the past 10 years, more than one billion children have received oral polio vaccine and are successfully protected from poliomyelitis.

For more detailed information on the *PolioPlus* program, see pages 114-117.

Rotary International Programs

Rotary's programs offer Rotarians a wide variety of service opportunities, and are oriented toward both Community and International Service. The international programs of RI often work in tandem with Foundation grants programs that provide an additional means of financial support. However, with respect to the Foundation, summaries of related RI programs are as follows:

World Community Service (WCS) consists of International Service activities through which a Rotary club in one country provides a Rotary club in another country with material, technical, and professional assistance for projects that promote international understanding and goodwill.

The RI Secretariat provides services to help clubs and districts become involved in WCS. One is the *WCS Projects Exchange* (754-EN), a listing of projects proposed or undertaken by a Rotary club in need of resources from outside the local community. The *Projects Exchange*, updated twice a year, is an avenue through which clubs seeking help for their projects and clubs offering help can find project partners worldwide. The listing is also posted on Rotary's World Wide Web site — www.rotary.org/programs/wcs — where it is updated regularly. *Additional support for WCS projects, in the form of Matching or New Opportunities Grants from The Rotary Foundation, is possible if specified criteria are met* (see the *Grants Subcommittee* section in Chapter 5 for more details).

Within the WCS program is the **Donations-in-kind Information Network (DIN)**, a centralized database that records offers of educational materials, equipment and tools, warehouse space, shipping services, etc., from Rotarians for other Rotarians who need them for WCS projects. **Resources:** *World Community Service Handbook: A Guide to Action* (742-EN), *WCS Information Request form* (786-EN), *World Community Service Projects Exchange* (754-EN).

Disaster Relief assistance is available through RI in response to disasters such as earthquakes, hurricanes, floods, volcanic eruptions, and wildfires. At the request of the governor of an affected district, RI issues a Notice of Disaster — a brief description of the crisis and information on how to meet resulting needs, such as through financial contributions, volunteer services or donated goods. The notices are circulated worldwide, giving Rotarians at both national and international levels an opportunity to respond. *Also, at the RI President's discretion, a Presidential Disaster Relief Grant of up to \$10,000 from The Rotary Foundation can be made to the affected district as a gesture of sympathy and solidarity. In addition, through the Foundation's SHARE system, districts may choose to utilize up to \$10,000 of their District Designated Fund (DDF) to assist disaster relief efforts in another country.* (See page 113.)

The **Rotary Volunteers (RV)** program, which is open to both Rotarians and non-Rotarians, creates a greater awareness of volunteer opportunities both locally and internationally. It is an information network that operates at the club, district, and international levels.

At the international level, RI maintains a registry of volunteers offering their services and of project sites requiring volunteer assistance from abroad. Listings of these volunteers and sites are published twice each year to help facilitate matches. *Individuals who serve internationally and meet certain criteria may be eligible to receive funding to help offset their expenses through the Foundation's Grants for Rotary Volunteers* (see pages 105-107). **Resources:** *Rotary Volunteers Handbook* (263-EN), *Rotary Volunteers Resource List* (288-EN), *Rotary Volunteers International Volunteer List* (280-EN), *Rotary Volunteers International Site List* (279-EN).

The **Rotary Community Corps (RCC)** program encourages Rotary clubs to identify service-minded non-Rotarians with leadership potential who could benefit from organizational and/or technical assistance to carry out local community development projects. Through Rotary

club sponsorship, RCCs are organized in rural or urban communities and may receive Rotary, Rotaract, or Interact assistance to advance their projects. The purpose of the RCC program is to promote grass-roots, self-help development projects; develop local leadership abilities; maximize local resources; and use appropriate cost-efficient technology. Because The Rotary Foundation places importance on hands-on community involvement in the national grant programs, RCCs can be a valuable asset for projects seeking Matching Grant or 3-H Grant funding. **Resources:** *Rotary Community Corps Handbook* (770-EN), *Rotary Community Corps brochure* (779-EN).

Rotaract involves young men and women, ages 18-30, who desire an opportunity to enhance their personal development by building their leadership and professional skills. You might consider using these Rotary “partners in service” as an additional resource in executing a Foundation grant or program. **Resources:** *Rotaract: Building a Better Tomorrow* (663-EN), *Rotaract Handbook* (562-EN).

An international organization of service and social clubs for youth ages 14-18, **Interact** clubs are sponsored by Rotary clubs. Interactors enthusiastically carry out service projects and are dedicated “partners in service.” Consider involving them in your project when applying for a Foundation grant. **Resources:** *Serious Fun* (600-EN), *Interact Handbook* (654-EN).

For more detailed information on these RI programs and service opportunities, please contact the RI Programs Department at World Headquarters by telephone at (847) 866-3291 or by fax at (847) 866-6116.

Foundation Financial Support

The Rotary Foundation is supported solely by voluntary contributions from Rotarians and friends of the Foundation who share its vision of a better world. Fund development supports the mission of the Foundation by enabling Rotarian leaders to solicit contributions to support the Foundation’s humanitarian and educational programs. Contributions to the Annual Programs Fund are pursued along with gifts and benefactor commitments to the Permanent Fund.

When Arch Klumph first proposed the notion of an endowment fund to further the ideals of Rotary, he imagined it as a fund to which Rotarians would feel honored and privileged to contribute. Little did he realize that seed would germinate and become the mighty oak of Rotary’s good works. The financial support the Foundation receives today will help secure many better tomorrows for people all over the world.

Annual Giving

Description

For support today. Gifts made to the Annual Programs Fund meet one of “Two Needs, Two Ways of Giving” to support The Rotary Foundation programs. Annual giving is the cornerstone of the Foundation’s funding efforts. An individual’s annual giving history should be reviewed to identify prospects capable of contributing major and planned gifts.

Highlights

The Rotary Foundation’s annual giving efforts have these primary objectives:

- To establish regular patterns of giving, possibly leading to major outright and/or deferred gifts;

- To attract, inform, and involve potential contributors;
- To maximize contributions to the Foundation to support Rotarians' International Service;
- To encourage participation in club and district Foundation-sponsored programs.

What You Should Know

- 100 percent of contributions available for Foundation programs.
- Seeks annual gifts from *all* Rotarians.
- Part of the three-year funding cycle: contributions raised in 2000-01 will fund programs in 2003-04.
- Has been the source of funding for Foundation programs since 1957.
- Through *SHARE*, 60 percent of gifts returned to districts directly through their District Designated Funds (DDF).
- Through *SHARE*, 40 percent of gifts are returned to districts through grants for humanitarian programs and provide a GSE program for every district through the World Fund (WF).
- Paul Harris Fellow and Multiple Paul Harris Fellow Recognition is available for contributions to the Annual Programs Fund.
- Gifts typically from discretionary income (cash), though capital assets are also accepted.
- Has grown from \$3.5 million in 1971-72 to \$57 million in 1998-99.
- *Key to Foundation's role today.*

Important Dates and Events

DATE	EVENT
November	Rotary Foundation Month
31 December	Contributions sent to The Rotary Foundation and postmarked on or before this date will be credited as gifts for the <i>calendar</i> year
30 June	Contributions deadline for the <i>fiscal</i> year

For more detailed information, see the *Annual Giving Subcommittee* section beginning on page 56.

Permanent Fund Giving

Description

The Permanent Fund is a fund that is invested in perpetuity, with a portion of the earnings spent annually to benefit the Foundation's programs while maintaining growth of principal. These funds provide an extra stream of income to assure the increasing delivery of international humanitarian, educational, and cultural activities being initiated by Rotarians. As the first Permanent Fund target of \$200 million by 2005 was reached significantly ahead of schedule (1998-99), a new target of \$1 billion has been set for 2025.

The Benefactor program is the first step in supporting the Permanent Fund by designating The Rotary Foundation in a personal will, planned gift, insurance or other estate gift, or by making a minimum outright gift of \$1,000 to the Permanent Fund.

Highlights

- Complements lifetime annual giving with funds that generate program support in perpetuity.
- Gifts reflect the importance of Rotary to one's life and personal commitment to International Service long after the donor is deceased.
- Bequests should be encouraged because the average testamentary gift made after careful consideration by the Rotarian and his or her spouse is usually larger than an outright contribution.
- Allows donors to transfer assets and still retain the income for life (Pooled Income Fund, etc.).
- Consists primarily of testamentary gifts, life income transfers, and contributions of capital assets.
- Donors can direct the annual spendable (realized income) portion of their gifts.
- Testamentary and estate gifts permit The Rotary Foundation to grow and create new programs for generations to come.

Personalized Permanent Fund Gifts

Donors may establish Named Funds within the Permanent Fund, in their own names as well as to honor others. Annual notification of the fund's earnings will be made, and annual earnings generated by the invested principal will provide financial support to Foundation programs according to the donor's direction at the time of the gift.

Earnings from a gift of:

- \$25,000 (minimum) will establish a named fund from which earnings can be directed to either the District Designated Fund or the World Fund.
- \$50,000 (minimum) may be designated to support an approved program of the Foundation, e.g., The Joe and Jane Rotarian Matching Grants Fund.
- \$150,000 (minimum) will fund the establishment of a named fund to support a project within an approved Foundation program.
- \$1,000,000 (minimum) may fund a new program and/or activity of the Foundation within Trustee guidelines.

Benefactor Recognition for Permanent Fund Gifts and Commitments

A Benefactor of The Rotary Foundation of Rotary International is anyone who informs the Foundation in writing that he or she has made provision in his or her will or other estate plan naming the Foundation's Permanent Fund as a beneficiary, or anyone who makes an outright gift of \$1,000 or more to the Foundation's Permanent Fund.

For more detailed information, see the *Permanent Fund* section beginning on page 66.

Major Gifts

Description

Major gifts are those of at least \$10,000 made either to the Annual Programs Fund or to the Permanent Fund of The Rotary Foundation. All outright contributions, irrevocable life income arrangements, and bequest gifts (upon receipt of the proceeds) at or above this level qualify as major gifts. Pledges are also accepted, and are typically paid within two or three years. The Foundation respects donors' requests for anonymity or that they not be publicly recognized,

but appreciates the opportunity to thank donors publicly for their generous contributions. Such public recognition often encourages others to consider similar gifts.

Historically, The Rotary Foundation receives much of its support through Paul Harris Fellow contributions and from individuals and club/district fundraising activities such as Foundation dinners and raffles, but major gift activity is growing in Rotary. In fact, an individual's history of annual giving can be an important indicator for identifying and cultivating prospects capable of contributing major and planned gifts.

The Foundation has approved guidelines to accept, manage, and serve as trustee for gifts that provide a life income to the donor(s): Pooled Income Fund, Charitable Gift Annuities, Charitable Remainder Annuity Trusts, and Charitable Remainder Unitrusts. Illustrations depicting income and estate tax consequences for gift transfers used to fund such life income gifts are available upon request.

The Foundation has also developed gift acceptance procedures providing clear guidelines for those Rotarians electing to use publicly traded securities, closely held stock, real estate, and tangible personal property.

Highlights

- Major gifts are encouraged for both the Annual Programs Fund and the Permanent Fund.
- Annual Programs Fund donors may establish a 2002-03 Named Scholarship award when they give \$25,000 (by 1 February 2001 to the Annual Programs Fund).
- Donors should direct that the spending portion of their Permanent Fund gifts be channeled through the *SHARE* system or to the World Fund to be spent where the need is determined by the Trustees to be the greatest.

Major Donor Recognition

Special recognition is presented to donors at various levels of cumulative contributions. Their names are prominently displayed in the Foundation's Hall of Honor and they may be invited from time to time to Foundation appreciation events.

CONTRIBUTION TOTAL	CRYSTAL LEVEL AND DIAMOND CIRCLE PIN LEVEL
\$10,000 to \$24,999	Level 1 Crystal and Diamond Circle Pin with one stone
\$25,000 to \$49,999	Level 2 Crystal and Diamond Circle Pin with two stones
\$50,000 to \$99,999	Level 3 Crystal and Diamond Circle Pin with three stones
\$100,000 to \$499,999*	Level 4 Crystal and Diamond Circle Pin with four stones
\$500,000 to \$999,999*	Level 5 Crystal and Diamond Circle Pin with five stones
\$1 million and above*	Level 6 Crystal and Diamond Circle Pin with six stones

* Donors of \$250,000 or more will have their portraits displayed in the Hall of Honor at World Headquarters.

Foundation recognition should be requested through the responsible Foundation volunteer coordinating the recognition presentation. Staff also initiates the Major Donor Recognition process by communicating with the donor or Rotarians in the donor's district.

For more detailed information, see *Major Donor/Major Gift Recognition*, pages 72-74.

The Rotary Foundation Bequest Society

At their October 1999 meeting the Foundation Trustees approved a Rotary Foundation Bequest Society. Those who inform the Foundation they have made a bequest commitment in their final estate plan will be extended recognition through the newly established society.

A new and standard-sized Bequest Society Recognition crystal has been authorized, along with a diamond pin (an additional diamond for each contribution range) that corresponds to the current six levels of major gift recognition.

The *SHARE* System

Description

The *SHARE* system is The Rotary Foundation's unique contribution allocation system, allowing districts to determine how contributions are spent and enabling districts to participate in the Foundation's programs that are of the most interest to them. Under *SHARE*, all district annual giving is totaled at the end of the contribution year and is divided into two funds, with 60 percent credited to the District Designated Fund (DDF) and 40 percent credited to the World Fund (WF). Each district is given an opportunity to allocate its DDF to fund the programs listed as *SHARE* options. The WF pays for the other programs for which every district may apply, such as Group Study Exchange, 3-H Grants, Matching Grants, Grants for Rotary Volunteers, Rotary Peace Programs, and any new pilot programs.

Highlights

The system is called *SHARE* because the name describes what the system does:

- Rotarians *SHARE* their resources with their fellow Rotarians around the world in a spirit of solidarity. The 40 percent of annual giving credited to the World Fund is used by the Foundation to fund the programs to which every district/club may apply regardless of its own contribution levels.
- The Trustees *SHARE* some decision-making with the districts by giving each district an opportunity to allocate the 60 percent of its contribution to fund the programs in which it chooses to participate.
- Rotarians *SHARE* Rotary with the world through their Foundation. The programs of the Foundation, funded through both the WF and DDF, are a tangible and effective means of furthering the understanding and friendly relations between people of different nations, thereby accomplishing the objective of The Rotary Foundation.

You Should Also Know

- Because of the Foundation's three-year funding cycle, contributions are used for programs three years after they are received. The three-year cycle gives districts time for program planning and participant selection, and allows the Foundation to invest the contributions to pay for all administration, program operations, and fund development costs.
- Under *SHARE*, available program options are grouped into four broad allocation categories: humanitarian, educational, program enhancement, and donation. This gives districts additional flexibility in using their DDF as districts are not required to identify specific program options at the allocation stage.

Important Dates and Events

DATE	ACTION
November 2000	Allocation process begins (Contribution Year 1999-2000, Program Year 2002-03) <i>SHARE</i> Allocation Workbook distributed to district governor, district governor-elect, immediate past district governor, and district Rotary Foundation chairperson
1 March 2001	Initial deadline for submission of <i>SHARE</i> Decision Worksheet Final deadline for Donated DDF Options
30 June 2001	Final deadline for submission of <i>SHARE</i> Decision Worksheet

For more detailed information, see Chapter 6, “The *SHARE* System.”

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Rotary Foundation Leadership and Resources

Leadership

The Rotary Foundation is a grass-roots organization that begins with the individual Rotarian. Without his or her active participation and support, it is not possible to carry out the Foundation's humanitarian, educational, and cultural exchange programs.

Club Rotary Foundation Committee

The Club Rotary Foundation Committee is key in mobilizing club members to help achieve Foundation goals. Appointing the committee is the responsibility of the club president for that particular year. The committee's primary responsibilities are to publicize the work of the Foundation to the club membership and to encourage active participation in and financial support of its programs. The committee should also increase public awareness about the work of the Foundation.

To aid the club in accomplishing its Foundation objectives, the Club Foundation Committee works with the Program Committee to arrange, at least quarterly, club meetings devoted to the Foundation, its purpose, and programs. It also works with the Club Public Relations Committee to inform local media of Foundation activities. Other responsibilities of the Club Foundation Committee are detailed on pages 52-53.

District Rotary Foundation Committee

The District Rotary Foundation Committee (DRFC) is a group of experienced and dedicated Rotarians, appointed by the district governor for that year, who assist the governor in carrying out Foundation activities in the district. The committee serves as the liaison between the Foundation staff and leadership, and the district's Rotary clubs.

One of the committee's most important responsibilities is to present on a personal level the full scope of Foundation activities, including the solicitation of gifts, to all Rotarians in the district in helping to achieve the district's Foundation goals. Therefore, the committee's success directly depends on the enthusiasm and expertise of its members, the quality of information they receive and disseminate, and the strong communication they have with their fellow Rotarians. More information on the committee can be found beginning on page 49.

District Governors

District governors play a key role in the success of the Foundation at the district level by serving as an advocate for The Rotary Foundation. Three of the most important responsibilities governors have with respect to the Foundation are: appointing a District Rotary Foundation Committee, conducting a District Rotary Foundation Seminar, and communicating progress toward achieving Foundation goals to Rotarians in the district as well as to the appropriate Regional Rotary Foundation Coordinator.

To help ensure success in achieving district Foundation goals, governors should select Rotarians to serve on the District Foundation Committee who are knowledgeable about the Foundation and are able to effectively communicate its message. They should also ensure that committee members receive appropriate training to fulfill their roles and responsibilities.

Each governor is encouraged to conduct a District Rotary Foundation Seminar during his/her term in office. It is recommended that the seminar be conducted as early in the Rotary year as possible, usually between 1 July and 15 November. Governors should work closely with members of the District Rotary Foundation Committee in planning and conducting the seminar. A successful seminar can motivate and inspire Rotarians to carry out active service programs at the club and district levels that take full advantage of the opportunities provided by the Foundation. For additional information on planning and conducting a District Rotary Foundation Seminar, refer to the *2000-01 District Rotary Foundation Seminar Manual*.

District governors serve as a vital communications link between Rotarians in each district and the Foundation, placing them in a unique position that enables them to promote both Foundation programs and financial support. An important part of the governor's role as a key Foundation advocate is communicating Foundation goals and the progress toward achieving them to clubs in the district, as well as to the Regional Rotary Foundation Coordinator. Under the guidance of the governor, the District Rotary Foundation Committee, assistant governors (if applicable), and Club Foundation Committees will also play an important role in communicating Foundation goals. Governors should address Foundation goals during club visits. For districts that have adopted the District Leadership Plan, the scheduling of the governor's official visit is now more flexible and may be used to highlight important Foundation events or award presentations.

For districts that have adopted a District Leadership Plan, **assistant governors** can serve as an additional resource to help promote the Foundation and its work to clubs in the district. Although the duties assigned to each assistant governor may vary from district to district, it is recommended that assistant governors participate in Rotary Foundation programs, annual and special giving events, and other special assignments as necessary. Assistant governors can help communicate district Foundation goals to the clubs with whom they work and facilitate the development of club Foundation goals by working closely with the club president and other club leaders. Assistant governors are also in a unique position to monitor club Foundation program participation and contribution goals as well as to serve as a resource for Foundation programs. The Board recommends that assistant governor training include a 90-minute session on "Successful Service: The Programs of Rotary International and Its Foundation." For more information on training assistant governors, including suggested Foundation resources, refer to *Guidelines for Training Assistant Governors* (244-EN).

Rotary Foundation Trustees

The Rotary Foundation is governed by a 13-member Board of Trustees from various parts of the world, appointed by the President of Rotary International and approved by the RI Board of Directors. Each Trustee serves a four-year term. Four of the Trustees are past Presidents of RI. Each Trustee shall be a Rotarian with broad Rotary, senior executive, and policy-making experience, particularly in finance and the fields in which the Foundation supports activities.

The Trustees manage the affairs of the Foundation, including the administration of all funds, property, and programs.

The General Secretary of RI serves also as General Secretary of the Foundation. This individual is the chief operating officer, responsible for carrying out decisions made by the Trustees.

Resources

Regional Rotary Foundation Coordinators (RRFCs)

There are 28 Regional Rotary Foundation Coordinators (RRFCs) serving in all parts of the Rotary world. RRFCs are selected by the Trustee Chairman in consultation with the RI President and serve as primary Foundation resources for a designated area. A link between the Secretariat and the districts, RRFCs support district governors and governors-elect in selecting their Foundation committees and in establishing and accomplishing district Foundation goals. In addition, RRFCs conduct Governors-elect Training Seminars (GETS) to help governors-elect understand Rotary Foundation programs and fund development. They also conduct Regional Rotary Foundation Seminars and support governors in planning District Rotary Foundation Seminars. They are also available to serve as Foundation speakers for District Conferences, Presidents-elect Training Seminars, District Assemblies, and other Foundation-related events.

RRFCs are eager to assist district leadership in their efforts to support the Foundation and look forward to opportunities to participate in district Foundation activities. A list of RRFCs is available from the Foundation's Planning and Administration Division at RI World Headquarters, is contained in the *Official Directory*, and is on the RI Web site at www.rotary.org.

Permanent Fund National Advisors

The Rotary Foundation Permanent Fund National Advisors provide a link between district Foundation subcommittee chairpersons and Foundation staff. Their role is to help motivate chairpersons to identify, contact, and solicit potential Major Donors. They help organize and train groups of volunteers with technical expertise, such as financial planners and estate planning attorneys, to represent Permanent Fund district subcommittees and be available as a regional resource for assistance with donor relations. They also provide information and progress reports periodically to Permanent Fund leadership and staff, and assist the RRFCs to ensure maximum involvement of the Permanent Fund Initiative in RI programs and activities.

Advisors are appointed jointly by the RI President and the Trustee Chairman after consultation with the Permanent Fund leadership. Appointments are for one year and are renewable for a maximum of three years. One advisor is appointed for every eight to ten districts.

The National Advisor system is currently active within the United States and Canada. A list of National Advisors is available from the Fund Development Field Services Department at RI World Headquarters. In Europe and RIBI, the Permanent Fund Committee will appoint regional Permanent Fund volunteers for the 2000-01 Rotary year.

In Japan and Korea, the respective RRFCs have been working with Permanent Fund Committees, appointed by the Trustees, to prepare their countries for the Permanent Fund Initiative.

Foundation Alumni Resource Group

The Foundation Alumni Resource Group (FARG) is a worldwide task force of 50 members appointed by the RI President-elect and The Rotary Foundation Trustee Chairman-elect. FARG's role is to increase Rotarians' awareness of Foundation alumni, and to promote their use as resources for club and district service projects and activities, effective advocates of Foundation programs, and potential sources of new members in Rotary clubs.

FARG members work with Regional Rotary Foundation Coordinators and district subcommittee chairpersons to conduct alumni events and scholar orientation seminars, and to develop human interest stories on program alumni for inclusion in *REConnections* and other appropriate publications such as *THE ROTARIAN*, *Rotary World*, and *Rotary News Basket*. For more information, consult the *Official Directory* or RI Web site (www.rotary.org) for the FARG coordinator in your area.

PolioPlus Speakers Bureau

The PolioPlus Speakers Bureau, now beginning its fifth year, promotes the goals of Rotary's PolioPlus program through individual presentations at Rotary club meetings, special events, fundraisers, and other activities upon request. It also serves as a resource for district PolioPlus chairpersons. Speakers, of which there were 37 during the 1999-2000 Rotary year, are appointed by the RI President-elect and Rotary Foundation Chairman-elect. To contact the speaker in your area, check the *Official Directory*. For additional information, contact the PolioPlus section at World Headquarters in Evanston.

PolioPlus Partners Task Force

The PolioPlus Partners Task Force promotes district and club participation in PolioPlus Partners projects. Its members, located primarily in polio-free countries, serve as resources on PolioPlus and PolioPlus Partners program information, and assist in advising Rotarians on the various ways they may support a PolioPlus Partners project. Like the members of the PolioPlus Speakers Bureau, they are available to make presentations at Rotary club and district events. To contact the PolioPlus Partners Task Force member in your area, please consult the *Official Directory*. For additional information, contact the PolioPlus section at World Headquarters in Evanston. (See "The Rotary Foundation Staff Contact List" at the beginning of this handbook.)

Publications/Videos

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

The Rotary Foundation Fact Book (101-EN). Contains answers to the questions most frequently asked about The Rotary Foundation, covering organization, programs, finances, and development.

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

1998-99 Rotary Foundation Annual Report (187B-EN). Audited financial statements for The Rotary Foundation showing all revenues and expenditures for the 1998-99 fiscal year, as well as program information and profiles. The *1999-2000 Rotary Foundation Annual Report* will be available in December 2000.

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.

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.

District Rotary Foundation Seminar Manual (438-EN). Offers a variety of tools for successfully carrying out a District Foundation Seminar, including help in designing a seminar agenda, identifying logistical needs, and suggesting seminar 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 and shows how all Rotarians can be involved. Provides an update on the changing battle against polio and the importance of continued Rotarian involvement.

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

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. 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.

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

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

PolioPlus Presentation Kit (328-EN). Script and slides to update clubs and districts on Rotary's progress in eradicating polio and how to become involved.

These resources are available by contacting Publications Order Services at Rotary World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276.

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District Leadership

It is through the strength of committee leadership and the establishment of Foundation goals in districts and clubs that The Rotary Foundation has achieved prominence and continues to excel as a leader in the movement toward world understanding and peace. Effective district leadership is the key to maintaining that position of excellence.

District governors should begin working with their District Rotary Foundation Committees as early as possible to establish goals. A realistic but challenging set of goals is at the core of Foundation activity. Linking financial goals with program participation is an essential element in motivating clubs to support their Foundation.

Teamwork is an important ongoing element of effective district leadership. Involving club committee chairpersons and others in the planning process and instilling a sense of joint ownership of the Foundation will increase the level of success at both the district and club levels. Maintaining the motivation to achieve success is also essential. The key here is visibility. It is the responsibility of district leaders to continually educate and inform members about Foundation programs, seminars, publications, meetings, and other matters. Use newsletters, Foundation alumni, and any other resources at your disposal.

District Governors-elect

The primary responsibility of district governors-elect in relation to The Rotary Foundation is to appoint Rotarians to the District Rotary Foundation Committee and develop district goals for both program activity and financial support. Your success as a district governor-elect in Foundation-related accomplishments is directly related to personal leadership in carrying out the plans and strategies developed to achieve the district's goals.

Appointment of District Rotary Foundation Committee and Development of Your Team

The importance of selecting the District Rotary Foundation Committee (DRFC) and its subsequent support by the district governor cannot be overemphasized if the district is to achieve its Foundation goals.

The DRFC consists of a chairperson and seven subcommittee chairpersons. All members of the DRFC committee and its subcommittees are appointed by the district governor for that year. The Rotary Foundation Trustees recommend that, if possible, the DRFC chair and the subcommittee chairpersons be past district governors. It also is suggested that members serve staggered three-year terms to provide continuity and to avoid total turnover of the committee membership each year.

Foremost, committee members should be outstanding Rotarians familiar with all aspects of The Rotary Foundation. Members can become more familiar with Foundation programs and activities by attending one of the Foundation seminars in their zone or region.

The Foundation staff at World Headquarters communicates regularly with the DRFC through letters, brochures, news releases, and contribution reports. To ensure that DRFC members receive these mailings from the beginning of their terms, you as the district governor-elect should report their names, addresses, telephone numbers, and other contact information (such as fax numbers and e-mail addresses) to Foundation staff, using the "District Rotary Foundation Committee Appointments Form" contained in the *District Governor's Training Manual*. You are requested to submit this information *no later than 1 March of the calendar year you will take office as governor*.

Development of Rotary Foundation Goals

Developing visionary and effective Foundation goals for the district requires careful preparation. Before formulating goals, a realistic evaluation of Foundation-related activities in the district is required. Knowing the status of the Foundation in the district provides a basis for determining goals. When setting goals, keep in mind that an effective goal is measurable, achievable, challenging, and shared. Examine the primary challenges to achieving each goal and the best methods to overcome these challenges.

You should work closely with the District Rotary Foundation Committee and are encouraged to work with your Regional Rotary Foundation Coordinator to establish district Foundation program participation and financial contribution goals, and develop plans to achieve these goals, *all prior to the International Assembly*. (Goal-setting will be reviewed at the International Assembly prior to finalization.) You and your committees also may gain valuable information by discussing goal-setting with their predecessors.

The development of goals is a multi-step process. The thoughtful design and timely execution of goals are crucial to having a successful year as district governor.

Step 1

In mid-November, the DGE receives the Annual Programs Fund goal-setting mailing, which includes a "Foundation Financial Support Goal Worksheet." The DGE will also receive projected *SHARE* option cost information for three years hence (the year in which contributions raised by the DGE are available for expenditure).

The district profile is also sent as a resource to the DGE. It includes a five-year history of the district's Foundation contribution goal and its success in achieving that goal. It also includes historical information on program participation, both for the preceding year and in total.

As the DGE, you must have a firm grasp of what the district has accomplished and is doing before you can look to the future. Therefore, it is recommended that you reference the district profile to understand what the district has done in the past and what it is capable of doing in the future.

Step 2

The next step in developing Foundation-related goals is to attend the Governors-elect Training Seminar (GETS) held in conjunction with the Rotary Institute. This specialized training at the regional/zone level is vital to the success of all DGEs and is considered mandatory.

- With regard to the Foundation, specialized training provided at GETS will include The Rotary Foundation Basics (including the *SHARE* system), The Rotary Foundation Programs, and Fund Development. In addition, the DGE should expect to gain an understanding of the current district governor's goals and learn about strategies being implemented by other district governors and Foundation Committees to promote the Foundation and achieve their goals.

RI will notify you of all training expectations at least 60 days prior to your attendance at GETS. This communication will include an overview of topics addressed, preparation information, and the dates of Institutes.

Step 3

After becoming familiar with the district's prior Foundation-related activities (via the district profile) and attending GETS, you should be in a position to begin developing Foundation-related goals to be achieved during your year in office. A "District Foundation Goals Worksheet" (see page 43) is included to aid in this process.

As you complete the "District Foundation Goals Worksheet," keep in mind the District Foundation Goals for Consideration section which follows, that other district leaders need to be involved in these decisions, and that the *SHARE* system is based on a three-year cycle: contributions made during 2000-01 will be available for programs that will be implemented in 2003-04.

District Foundation Goals for Consideration

The Trustees of The Rotary Foundation suggest that DGEs consider the following in developing their own Foundation-related goals.

General

- To have every club appoint a Foundation Committee and establish club Foundation goals in support of district goals.
- To establish and maintain a district alumni list, and utilize these valuable past program participants as guest speakers for club and district meetings.

Program-Related

NOTE: When developing program participation goals, you as the DGE should consider *SHARE* allocations which will be available during your year. For example, if the district will have a large amount of District Designated Funds available for humanitarian programs, the goals should include plans to utilize those funds.

- To provide recommended training and orientation programs for all incoming and outgoing Ambassadorial Scholars and Group Study Exchange (GSE) teams that will best prepare them to serve Rotary as ambassadors of goodwill.
- To hold inter-club meetings with visiting and returning GSE teams to allow team members to share with Rotarians the values of their GSE experience.
- To make advance informal contacts with other districts to plan for future GSEs.
- To make advance informal contacts with other districts to plan for future humanitarian projects.
- To involve several clubs in applying for one or more Matching Grants.
- To consider the gift of a scholarship to a district in a developing country.
- To help Rotarians in another country achieve their polio eradication goals by participating in a PolioPlus Partners project.
- To assess immunization needs in your own community. If you are located in a developing country, contact your National PolioPlus Committee. If you are located in a developed country, consider recommending to your District PolioPlus Committee and district officers that action be taken to raise immunization levels where needed.
- To identify or help fund at least one Rotary Volunteer from the district who can serve at least four weeks in a district outside your country.

Financial Support-Related

NOTE: When developing contribution goals, you should consider what *SHARE* options the district would like to have available three years later (e.g., contribution goals for 2001-02 must reflect program participation goals for 2004-05). For example, if the district would like to offer three Academic-Year Ambassadorial Scholarships during program year 2004-05, the district must contribute at least \$125,000 to the Annual Programs Fund during 2000-01 and allocate it to the Educational Programs Category in 2001-02.

- To increase general contributions by a certain amount over the previous year's.
- To encourage a personal contribution from every Rotarian in the district in support of his or her club's goal and the overall district goal for annual contributions. This may include a plan to obtain agreements from all Rotary Foundation Sustaining Members that they complete their commitments and become Paul Harris Fellows, and from all Paul Harris Fellows that they continue to contribute toward higher levels of Foundation support.
- To establish a goal for Benefactors and cultivate their support of The Rotary Foundation's Permanent Fund.
- In the United States, Canada, and other appropriate countries, to encourage each Rotarian to consider an estate commitment.
- To identify, cultivate, and solicit a determined number of potential donors capable of contributing major gifts of \$25,000 or more.

District Foundation Goals Worksheet

2001-02

Now that you have an objective inventory of the status of your district, you are ready to think about setting goals. Keep in mind that an effective goal is:

- Measurable
- Achievable
- Challenging
- Shared

Measurable means that the goal should be stated in quantifiable terms. For example, “Apply for two Matching Grants by 1 January” is more effective than “Become involved in humanitarian programs.” A measurable goal can be objectively evaluated at the end of the year.

Achievable means that your goals should be realistic, based on the material and volunteer resources you have or can expect to have, within the time frame established for your district’s goals.

Challenging means that achieving your goal will require vision, planning, teamwork, effort, and follow-through by you and those you will lead next year.

Shared means that those who will be implementing the goals should have a voice in developing some of the specific details for each goal. In particular, district committee chairpersons, group representatives, and assistant governors (if provided for in your district structure) should be included in your goal-setting process.

Look again at your district profile, reflect carefully, and list below goals or dreams related to both program participation and financial support of The Rotary Foundation. Again, you will refer to these goals throughout the year, so choose them with care.

➤ Goal:

➤ Goal:

➤ Goal:

➤ Goal:

Step 4

After completing the “District Foundation Goals Worksheet” you should complete the “Foundation Financial Support Goals Worksheet” received in mid-November. You must bring this completed form to the International Assembly. There, the financial support goals will be discussed, the worksheets will be collected from all the governors-elect, and the results will be tabulated. The Trustees will use this information to formulate the worldwide 2001-02 Annual Programs Fund goal.

Step 5

Attend the International Assembly. Learn how The Rotary Foundation with its international educational and humanitarian programs fits into the overall plan and structure of Rotary. Incorporate the RI theme into your Foundation goals. Share in the motivation and exchange of ideas that lead to reaching goals.

Step 6

After attending the International Assembly, you should be in a position to begin to develop strategies for achieving your Foundation-related goals. Remember that those who will be implementing the goals should have a voice in developing the specific details for achieving each goal. Therefore, be sure to work with the District Rotary Foundation Committee and, if possible, with club presidents to determine your strategies. All strategies should be in place prior to 1 July.

Step 7

The final step in developing your Foundation-related goals is to share them with your district membership.

Presidents-elect Training Seminar

- Introduce district Foundation goals to incoming club presidents.
- Communicate the following action steps to club presidents-elect early enough to allow for their successful completion.

Club presidents should:

- Appoint a Club Rotary Foundation Committee chairperson prior to the District Assembly. Select a chairperson who is both knowledgeable and enthusiastic about Foundation activities, and submit contact information to the DGE for inclusion in the District Directory.
- Establish club Foundation goals for program participation, such as proposing Rotary Ambassadorial Scholarships candidates, GSE team member candidates, or participating in a Matching Grants or PolioPlus Partners project. Also set goals for financial support, including a goal for annual contributions based on a percentage increase over the previous year’s contributions. These goals should be established in cooperation with the Foundation Committee prior to the District Assembly.

- Support the Foundation Committee members as they begin to develop a strategy for achieving the club goals.
- Along with the club Foundation chairperson, attend the District Assembly, and be prepared to report all club Foundation goals and discuss with fellow club officers strategies for achieving these goals.
- Support the Foundation Committee members in finalizing their strategies, prior to 1 July, for achieving the club goals.
- Along with the Club Foundation Committee and other club officers, attend the District Rotary Foundation Seminar, to increase knowledge of Foundation activities, receive up-to-date program and financial information, and discuss ideas, concerns, etc.

On 1 July, the new club president and Foundation Committee should begin to implement the strategy. The committee should be encouraged to meet periodically throughout the year to review progress being made toward the goals, and to make modifications to the strategy, as deemed necessary.

District Assembly

- Collect club goals and Club Foundation Committee appointments.
- Conduct a Foundation Planning Session for club Foundation Committees to provide information on Foundation programs and financial support for those programs. Present district Foundation goals and strategies, and discuss club goals and specific action steps clubs have developed to meet their goals.

At this point, all responsible district and club leaders have received Foundation training and you are prepared to implement your Foundation plans, supported by your entire district Foundation team, on 1 July, the start of your year as district governor.

District Rotary Foundation Seminar

The purpose of the District Rotary Foundation Seminar is to educate the district membership about the opportunities available through the Foundation, instill a sense of personal responsibility for the Foundation, and create a sense of ownership and pride on the part of Rotarians at the club level. The overall goal is to increase Foundation program participation and financial support. In order for this to happen, the seminar should be informational as well as motivational. The topics discussed during the seminar should be linked to the district's Foundation-related goals. The seminar should be held no later than 15 November.

See pages 51-52 for additional information regarding District Rotary Foundation Seminars.

Additional Responsibilities of the DGE

- Serve as an ex-officio member of the Scholarships, GSE, and Grants Subcommittees.
- Appoint and train assistant governors as appropriate with respect to Foundation responsibilities.
- Work with the current governor, immediate past governor, and current District Rotary Foundation Committee chairperson to determine *SHARE* allocations for program year 2002-03.

NOTE: See “The Rotary Foundation Calendar” (Chapter 8) for a complete listing of dates pertaining to application deadlines, mailings, meetings, events, and other important reminders.

District Governors

In addition to the goals and strategies planned in advance of his/her term of office, a district governor's success also depends on the leadership, energy, and enthusiasm he or she brings to the office and the attention given to the *tasks and responsibilities set forth below*. The governor should continue to work closely with the Regional Rotary Foundation Coordinator.

Key Responsibilities

Support of The Rotary Foundation should be a primary goal of your term. This support requires playing a wide variety of roles, such as a participant in Foundation recognition programs, seminars, annual and special giving events, and other programs as outlined below. You are encouraged to think carefully about your participation in these activities.

- Support your District Rotary Foundation Committee (DRFC), serving as ex-officio member of subcommittees as necessary.
- With assistance from your DRFC, conduct a district Foundation seminar for club presidents, Club Foundation Committees, and other interested Rotarians. The seminar should be held as early as possible, but no later than 15 November, and should provide updated information on Rotary Foundation programs and fund development. The seminar should also provide an opportunity to review the progress made toward district and club goals and to discuss your plans for achieving them. Ask your DRFC, alumni and Regional Rotary Foundation Coordinator to share information and provide inspiration. The *2000-01 District Rotary Foundation Seminar Manual* will be provided directly to your DRFC chairperson shortly after 1 July. This publication provides useful information for planning a seminar as well as background information for preparing presentations.
- Ask Rotarians to make a gift to the Foundation.
- During club visits, incorporate goals for Foundation program participation and contributions into your presentation and discuss the proposed course of action. Meet with club leaders to discuss club goals which are in concert with district goals.
- During the District Conference, participate in Foundation public relations and promotion, review progress toward achieving district Foundation goals, and thank Rotarians for the contributions they have made toward achieving district goals. (Make a final appeal if goals have not yet been achieved.)

- Submit *SHARE* Decision Worksheet for program year 2002-03 (sent to districts in November 2000 and due no later than 30 June 2001).
- Ensure the utilization of *SHARE* allocations available during program year 2000-01.
- Endorse, as required by Trustee policy, grant and/or scholarship applications.
- Participate in selection and orientation of 2001-02 Ambassadorial Scholars and GSE team members.
- Attend the Rotary Institute. Review goals, progress, and problems with other district governors and make adjustments if necessary.
- Attend the Regional Rotary Foundation Seminar. Learn the latest Foundation developments. Gain information regarding strategies being implemented by other districts to promote the Foundation and achieve their goals. Share your concerns and success stories with other district governors and Foundation Committees.
- Provide information and insight to your district governor-elect. Assist the governor-elect in planning and conducting the Presidents-elect Training Seminar and District Assembly.
- Include updated contribution information in your governor's newsletter.

NOTE: See "The Rotary Foundation Calendar" (Chapter 8) for a complete listing of dates pertaining to application deadlines, mailings, meetings, events, and other important reminders.

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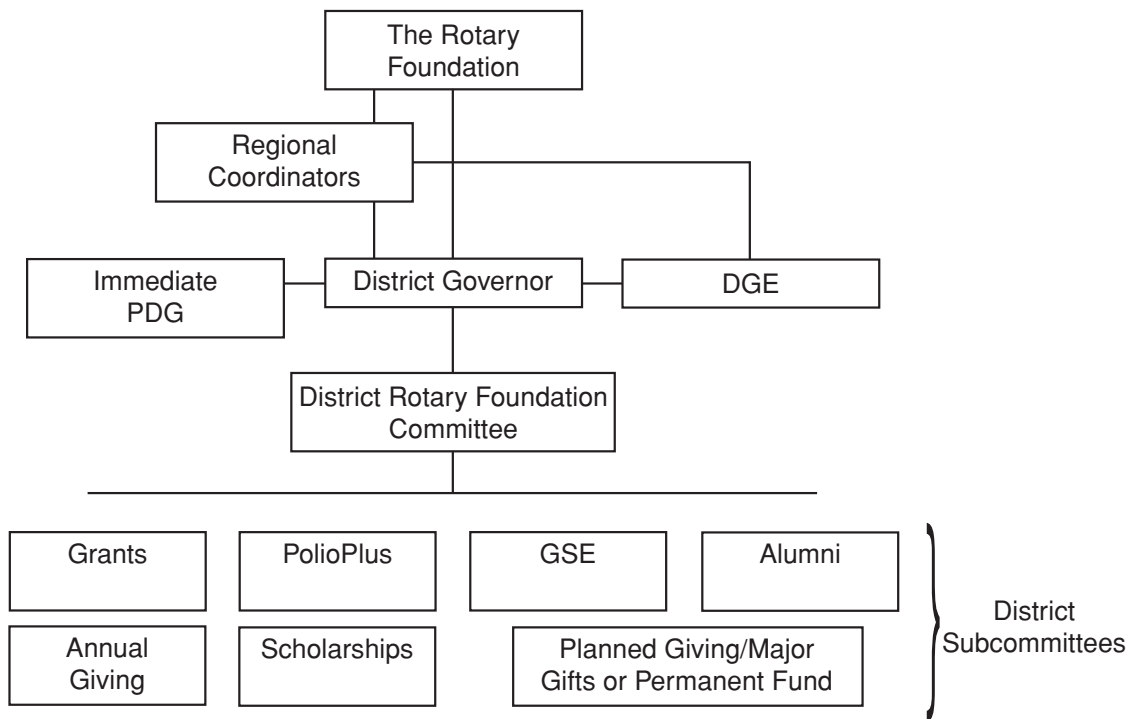
The District Rotary Foundation Committee (DRFC) and the Club Rotary Foundation Committee

The District Rotary Foundation Committee (DRFC) is a group of experienced and dedicated Rotarians who assist the district governor in carrying out Foundation business in the district. The committee serves as the liaison between the Foundation and the district's Rotary clubs. Its selection and subsequent support by the district governor cannot be overemphasized if the district is to achieve its Foundation goals.

Following is a diagram of **The Rotary Foundation district structure, including the subcommittees** recommended by the Trustees. The DRFC chairperson may combine some subcommittees as deemed necessary. All members of the district committee and its subcommittees are appointed by the district governor for that year. The Rotary Foundation Trustees recommend that, if possible, the DRFC chair and the subcommittee chairs be past district governors. It also is suggested that members serve staggered three-year terms to provide continuity and to avoid total turnover of the committee membership each year.

It is recommended that at least three Rotarians serve on each subcommittee, one being a professional in the relevant field, if possible. Foremost, committee members should be outstanding Rotarians familiar with all aspects of The Rotary Foundation. Members will become more familiar with Foundation programs and activities by attending one of the Foundation seminars in their region. Each subcommittee's responsibilities are detailed in Chapter 5.

The success of any DRFC is directly related to the enthusiasm and expertise of its members, the quality of information they receive and disseminate, and the strong communication the committee members have with their fellow Rotarians. This direct contact enables members to fulfill one of their most important responsibilities — presenting on a personal level the entire scope of Foundation activities to all Rotarians, including the solicitation of gifts.



Responsibilities of the DRFC Chair

The district Foundation chairperson, along with all district leaders, plays a critical role in realizing the overall objective of The Rotary Foundation. As chosen district leaders, district Foundation chairpersons accept the responsibility of furthering the Foundation’s objective by reaching out to the clubs, sharing the Foundation’s important message, and helping to realize the Foundation’s goals.

With the direct leadership of the district governor, the chair works with the committee to plan, coordinate, and evaluate all district Foundation activities. *This includes scheduling periodic meetings of the committee throughout the year to review the progress being made toward goals and to modify plans as deemed necessary.*

The chair serves as a member of all subcommittees and should be familiar with the responsibilities of each member of the DRFC. With support from the committee, the chair’s responsibilities include the following:

- Assists the district governor-elect in establishing and achieving district Foundation goals, especially a goal for annual contributions; encourages clubs to establish goals in support of these district targets.
- Coordinates work of district subcommittees.
- Assumes responsibilities of any subcommittee not appointed or functioning.
- Assists the district governor in presenting a District Rotary Foundation Seminar for club presidents, presidents-elect, Club Foundation Committees, and other Rotarians in the district.

- Encourages clubs to present club programs on the Foundation *at least* once per quarter, giving special observance to November — Rotary Foundation Month. (See page 130 for more details on Rotary Foundation Month.)
- Assists the district governor to ensure the success of Foundation programs within the district.
- Encourages high levels of financial support for Foundation programs through regular Annual Programs Fund contributions and gifts to the Foundation Permanent Fund.
- Ensures coordination of all district Foundation fundraising activity, including the Annual Programs Fund, Permanent Fund, Matching and Helping Grants, and PolioPlus Partners.
- Ensures adequate and effective communication with the Club Foundation Committees to convey an awareness and understanding of the Foundation to all the clubs in the district (see *The Club Rotary Foundation Committee*, page 52).
- Answers questions from clubs and Rotarians about Foundation programs, development, contributions, and Paul Harris Fellow Recognition.
- Contacts Foundation staff to clarify policy and obtain information.

In addition to the above, attending a Regional Rotary Foundation Seminar conducted by a Regional Rotary Foundation Coordinator (RRFC) should be considered a required responsibility for district Rotary Foundation chairpersons.

The regional seminars are specifically designed to train district leadership on the Foundation's programs, offer ways to financially support these programs, and make district leadership aware of the tools available to them to conduct a District Rotary Foundation Seminar. Participating in a regional seminar has many benefits, a few of which are listed below:

- Provides up-to-date, expert Foundation information;
- Provides district leadership the opportunity to acquaint themselves with the RRFC, who serves as a key Foundation resource for district leadership (see page 33);
- Introduces district leadership to the tools available for use at district seminars, such as Foundation publications and videos;
- Provides networking opportunities and successful idea exchanges with other district leaders in the region; and
- Provides motivational strategies for encouraging and realizing club participation in Foundation programs.

District Rotary Foundation Seminars

The objective of the District Rotary Foundation Seminar is to educate all Rotarians and instill a sense of personal responsibility for the Foundation, resulting in continued and increased program participation and financial support.

The district Rotary Foundation chairperson, actively supported by the district governor, is responsible for organizing at least one annual Foundation Seminar in his/her district targeted at club leadership. The district Foundation chairperson should actively work to support clubs in educating club members. Your RRFC can help you plan an effective District Foundation Seminar and represents a valuable general resource on all Foundation matters.

The *District Rotary Foundation Seminar Manual* is designed for use by the leaders of a District Foundation Seminar. The manual includes helpful information for designing the components of your seminar, sample agendas, and logistical considerations. In addition, it contains sections on each program and activity of The Rotary Foundation, including presentation notes, sample handouts, and pages which can be made into overhead transparencies. Each district Rotary Foundation chairperson will receive a manual from the RRFC responsible for serving the district.

Many other publications are available to distribute in support of a Foundation seminar. The purpose and use of these publications should be stated clearly when referring to them in a seminar to maximize their utility. Many of these publications are available at little or no cost to the district.

Videotapes, including the 15-minute video called *The Rotary Foundation: The International Vision of Rotary* (065-EN), are also available for showing at district seminars. The *International Vision* video is especially effective in introducing and sharing the impact of the Foundation's global activities. Showing this video may introduce many club leaders to the Foundation's programs for the first time.

For further information regarding available publications, videos and slidesets, consult the Rotary International *Catalog* (019-EN), the service center for your area, your RRFC, or the Foundation leadership development coordinator at RI World Headquarters. To order seminar materials, contact Publications Order Services, telephone: (847) 866-4600; fax: (847) 866-3276. Please allow at least six weeks for packing, shipping, and delivery.

The Club Rotary Foundation Committee

A list of Foundation-related action steps the district governor-elect and the District Rotary Foundation Committee should give to club presidents-elect (preferably at the Presidents-elect Training Seminar) starts on page 40. These steps include the appointment of a *club-level* Rotary Foundation Committee. *The District Foundation Committee is responsible for encouraging active Club Foundation Committees.*

The lack of understanding and awareness of The Rotary Foundation at the club level has been identified as the **critical weak link** in the Foundation reaching its goal. Therefore, it is essential that the Club Foundation Committee be active and involved in informing the club membership about Foundation programs and activities.

Responsibilities of the Club Rotary Foundation Committee

The primary responsibilities of the Club Rotary Foundation Committee are to publicize the work of The Rotary Foundation and to encourage active participation in and financial support for its programs.

Building Awareness

Generally, people only support and get involved in worthwhile activities they are knowledgeable about and can appreciate. This must be considered by the president-elect and the Club Foundation Committee as they develop a strategy for achieving their club Foundation goals.

Below are suggestions which may be incorporated into a strategy to increase awareness and educate club members and the public about the work of The Rotary Foundation.

- Arrange with the Program Committee to devote club meetings, at least quarterly, to the Foundation, its purpose, and its programs. One or more club meetings should be devoted to the Foundation specifically during Rotary Foundation Month — November. Many helpful publications and audiovisual programs are available from the Rotary service center for your area.
- Ask club members to make a gift to the Foundation.
- Utilize the club bulletin regularly to keep members informed of Foundation activities and progress toward club and district goals.
- Work with the club/district Public Relations Committee to inform local media of Foundation activities. Such newsworthy opportunities include the:
 - selection of a Foundation Scholar from the community,
 - volunteer service term of a local Rotarian,
 - approval of a Foundation humanitarian grant award, and
 - activities of the local or visiting GSE team.
- Invite past or current recipients of Grants for Rotary Volunteers, GSE team members, scholars, or University Teacher grantees to speak at club meetings and share their experiences of life abroad. Alumni can make a tremendous impact on Rotarians.
- Schedule a special event in the community to raise funds and promote the Foundation.
- Recognize Rotarians and others who have made significant financial contributions or have performed outstanding service in a Foundation program at club meetings and through the media.

Incoming club presidents will have received their *Club President's Workbook* and *Club Committee Manual* for 2000-01 at their Presidents-elect Training Seminars. Information on the Foundation is included in the "International Service" section of the new *Club Committee Manual*. The district leadership should be familiar with the club responsibilities and goals outlined in the manual.

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DRFC Subcommittees

Active district Foundation subcommittees are essential to achieving Foundation goals. Subcommittee members should be well-organized and dedicated Rotarians to ensure that district Foundation fundraising and program participation goals are achieved.

This chapter outlines the role and responsibilities of each District Foundation Subcommittee.

Annual Giving Subcommittee

Gifts to the Annual Programs Fund form the cornerstone of all Foundation funding. Most Rotarians make their first contribution to the Foundation through a district or club annual giving program. Consistent annual giving support is a strong indicator of an individual's ability to contribute major and planned gifts. Those prospects should be identified and cultivated.

The Rotary Foundation's annual giving efforts involve more than just fundraising. Its primary objectives include:

- Promoting to Rotarians and others the many successes of the Foundation;
- Encouraging every Rotarian to make an annual contribution;
- Educating Rotarians on the Foundation's operations; and
- Motivating Rotarians to participate in Foundation programs.

It is through these activities that Rotarians gain a personal appreciation for the Foundation and a desire to support its programs through voluntary contributions.

Specific Responsibilities

The Annual Giving Subcommittee is responsible for designing and implementing a comprehensive and effective district program to achieve the district's annual giving goal.

The success of a district Annual Giving Subcommittee is directly related to the enthusiasm and expertise of its members, the quality of information they receive and disseminate, and the direct communication they have with the District Rotary Foundation Committee, the Permanent Fund Committee (where applicable), and their fellow Rotarians. Annual Giving Subcommittees should have at least three members, one of whom might be a past district governor. Appointing a Rotarian with professional expertise in fundraising, sales, marketing, public relations, or a financial field to serve on the subcommittee, ideally as its chair, is highly recommended. In general, subcommittee members should be appointed for a term of three years, with the terms of different members overlapping, to provide continuity in the subcommittee's planning and leadership.

Specific responsibilities of the Annual Giving Subcommittee are to:

- Assist the district governor-elect and Foundation Committee chairperson in establishing a challenging yet realistic district Annual Programs Fund goal. This goal may be tied to prior years' general contributions, a desired level of program participation through the *SHARE* system (e.g., a Matching Grant project), two scholarships and an extra GSE, and/or per capita contribution figures. Goals should be established early to allow the subcommittee enough time to publicize them to clubs. Clubs should be encouraged to set goals in support of the district targets during the Presidents-elect Training Seminar.
- Encourage individual and club contributions in support of the district's established goal for the Annual Programs Fund. Publicize the goal monthly and keep district Rotarians informed of the progress toward it. Tools you can use include the district governor's newsletter, the Foundation's monthly contribution report for your district, notices sent directly to club bulletin editors, Rotary International's Web site at www.rotary.org, and a special district Foundation newsletter.
- Provide regular updates to all clubs on the progress being made toward their club goals. Provide copies of district contribution and recognition reports to club secretaries and/or club Foundation chairpersons. *This is the primary manner in which clubs receive these reports, as they are not typically sent directly to clubs by The Rotary Foundation.*
- Encourage clubs to conduct at least one program on the Foundation in each quarter of the year. Invite Ambassadorial Scholars, GSE team members, Rotary volunteers, and other alumni to speak at programs.
- Communicate with every club. Each member of the subcommittee should be assigned a list of clubs to contact on a regular basis. (The district governor also may find it helpful to utilize the services of the assistant governor[s] for this purpose.) Arrange regular meetings with the club's Foundation chairperson to assist the club in preparing special activities or programs for increased support of the Annual Programs Fund.
- Help organize and stimulate participation in club and district fundraising activities and special events in support of the Foundation. Involve past district governors throughout the district.
- Promote special giving opportunities such as corporate matching gifts and corporate and community Foundation support to maximize the potential of Rotarians' gifts. For more information about corporate and other giving opportunities, see *Sources of Annual Programs Fund Support* on page 58.
- Work with the District Rotary Foundation Committee chairperson to help organize and promote special programs throughout the district during Rotary Foundation Month (see page 130).
- Promote annual gifts from every Rotarian every year.
- Answer inquiries from clubs about club contribution reports and their giving records; consult Foundation staff on problems, reporting errors, and discussion of complicated questions.

How It Works

Unrestricted contributions from Rotary districts, clubs, Rotarians, and others go into the Annual Programs Fund to support the Foundation’s humanitarian, educational, and cultural exchange programs. These contributions are invested for a three-year period before being released to be spent on Foundation programs. A distinctive feature of the Foundation is that 100 percent of every contribution **goes to programs**. Earnings from the Annual Programs Fund investments, such as interest and dividend income, gains and losses on sales of investments, and currency exchange adjustments on sales of investments, pay for fund development and general administrative expenses. These earnings are reflected in the Foundation’s financial statements in the **Annual Programs Fund — Earned Income from Investments**.

Sources of Annual Programs Fund Support

NOTE: The Rotary Foundation recognizes that fundraising approaches must be appropriate to the customs and culture of the countries involved. Some of the following suggested methods may require adaptation to local attitudes and practices.

Individual Giving

Fundraising efforts on behalf of The Rotary Foundation are most successful when directed on a person-to-person basis. This approach is also an effective way for a district or club to achieve its annual giving goals. Traditionally, an individual contribution is the leading way in which Rotarians have financially supported the Foundation and, since every Rotarian is in essence a “shareholder” of the Foundation, each should personally be given the opportunity to support its programs and activities.

A number of districts and clubs implement an “every member” campaign, personally encouraging each Rotarian to make an annual contribution *proportionate* to his or her capabilities. Individual letters to each Rotarian, motivational club presentations, and person-to-person asks are three methods used in successful campaigns.

A successful appeal must provide information about Foundation programs and demonstrate that they are much-needed alternative solutions to international problems not offered by any other organization. It is important to show a prospective donor how a contribution to the Foundation can help establish a climate in which the chance for world peace can grow.

For a description of the basic types of recognition available for Annual Programs Fund contributions to the Foundation, see pages 61-65 (*Paul Harris Fellow Recognition*).

Memorial Gifts

By making a contribution in memory of a friend or loved one, Rotarians can pay tribute to the deceased and continue The Rotary Foundation’s work toward international understanding and peace. The Foundation will inform the family of the deceased person about the memorial gift with a letter. Memorial gifts may be made to either the Annual Programs Fund or to the Permanent Fund. Rotarians may request a supply of memorial gift envelopes from the Foundation.

An individual also can be made a Paul Harris Fellow posthumously. The donor can request that a special memorial Paul Harris Fellow certificate be prepared in lieu of the standard certificate.

Noncash Contributions

In the USA, contributions of publicly traded securities and other noncash items (including real estate and any life-income gift or transfer in trust) are valued and credited according to guidelines and principles articulated by the Internal Revenue Service. Questions regarding noncash contributions should be directed to the Fund Development Field Services staff.

Restricted Contributions

In a typical year, most gifts received by The Rotary Foundation are unrestricted Annual Programs Fund contributions. These count toward the district's Annual Programs Fund goal and support the Foundation programs through *SHARE* allocations.

Some contributions to the Foundation are directed by the donor to a specific fund or designated to be used for a particular program. Such "restricted" contributions may be earmarked for any one of several purposes, most commonly for the Foundation's Permanent Fund, a Named Scholarship, PolioPlus, PolioPlus Partners, or approved Matching Grants. If designated for the Permanent Fund, only the earnings based on a Trustee-established spending policy are used to fund programs. The spending policy ensures that the real value of the Permanent Fund (adjusted for inflation) is maintained in perpetuity.

Restricted gifts may receive Paul Harris Fellow Recognition (or Benefactor Recognition in the case of Permanent Fund gifts), but they do not count toward the district's *SHARE* total unless, in the case of Permanent Fund gift earnings, the donor has specified this intent.

Major Gifts to the Annual Programs Fund

Donors may elect to give major gifts (\$10,000 and above) to the Annual Programs Fund; however, if the donor does not specify this intent, major gifts will be directed to the Permanent Fund.

In the USA and Canada, District Permanent Fund Chairpersons (DPFCs) have been trained to identify, cultivate, and solicit major gifts and are an excellent resource for the Annual Giving Subcommittee. (See also *Major Donor/Major Gift Recognition*, pages 72-74.)

District and Club Special Events

In some countries, special events are popular methods by which districts and clubs raise funds for The Rotary Foundation. In addition to raising financial support for the Foundation, special events are used to recognize those who have made substantial contributions or provided outstanding service, give special focus to a specific project or program, and create a greater understanding and appreciation of the Foundation. Some examples of successful special events include auctions, talent shows, benefit concerts, banquets and dinner-dances, golf tournaments, fun runs, and walkathons. Please contact your Donor Services Representative for suggestions on how to collect contributions.

While many special events are specifically targeted to Rotarians and/or their spouses, others, such as benefit concerts, may be developed as community or district events to involve those outside Rotary and promote the Foundation's programs.

For further information or assistance concerning special fundraising events, contact the Fund Development Field Services staff of The Rotary Foundation at World Headquarters.

Corporate/Foundation Solicitations

In each district there are many corporations and community and family foundations. If they knew "The Rotary Foundation Story," they might join Rotarians in support of Foundation programs through major gifts, Named or Endowed Scholarships, matching funds for employee contributions, challenge grants, or other means. Corporate/foundation solicitation, as a part of your district's total development efforts, can help you achieve your Annual Programs Fund goal, and enable the Foundation to carry out its programs and continue to work toward world understanding and peace.

The most important aspect of the district's corporate/foundation solicitation is coordination. Clubs and districts must know what The Rotary Foundation is doing, and Foundation staff must be apprised of district activity so as not to duplicate efforts and possibly negate potential major gifts.

One particular avenue of support to pursue is challenge grants. A challenge grant is a pledge to augment or match a determined amount of funds raised by a club or district within a specific time frame. Many community and family foundations give their support through challenge grants.

For small or matching gifts from community and family foundations, The Rotary Foundation can provide sample proposal letters which the club or district can tailor to the interests of the particular organization. For larger grants, the Foundation Fund Development staff can work with local Rotarians to develop full proposals that meet the donor's interests.

Corporate Matching Gifts

Many companies have programs to match the charitable contributions given by their employees. Some companies double and even triple the employee's gift, and they might do so every time the employee makes one. Such companies often extend the matching of gifts to retired employees, nonemployee directors, and spouses of eligible employees and directors.

If a Rotarian's company does not currently have such a program, it is encouraged to work with the company's personnel department to help establish one. Such programs benefit not only The Rotary Foundation but the community in general, as gifts to hospitals, universities, museums, foundations, and other charitable institutions are often matched. The Rotary Foundation is organized as a charitable and educational not-for-profit corporation and is recognized as such by the US Internal Revenue Service. Many companies with matching gift programs will consider the Foundation eligible to receive matching gifts.

Applying for corporate matching gifts is easy to do. Every time Rotarians make a contribution to the Foundation, they should contact their company's personnel office and ask for the necessary application form and information to qualify for a matching gift. Donors should then send the form in with their check, and the Foundation does the rest of the work.

All contributions to the Foundation's Annual Programs Fund are eligible for Paul Harris Fellow Recognition and, through the *SHARE* system, are used to calculate the district's District Designated Fund.

Paul Harris Fellow Recognition

On the death of Rotary founder Paul Harris in 1947, Rotarians contributed \$1.3 million to The Rotary Foundation in his honor. With these donations the Foundation created the Scholarships program, its first significant International Service program. Rotarians continue this tradition of honoring Rotary's ideals and its founder by making contributions to the Foundation. Each individual who contributes \$1,000 — or in whose name \$1,000 is contributed — receives, upon request, Paul Harris Fellow Recognition. (NOTE: Contributions to the Permanent Fund receive *Benefactor Recognition*, and are therefore *not* eligible for Paul Harris Fellow Recognition.)

Contribution recognition is critical to the ongoing financial support of the Foundation. The sincere acknowledgment of a donor's gift is the first step toward additional contributions. The remainder of this section describes the history and various types of contribution recognition provided by the Foundation.

It is also important to realize the importance a donor might place on local recognition, within his or her own club or district. When a contribution has been received, find an appropriate way to thank the donor locally. For instance, ask permission to print the donor's name in club or district newsletters, or arrange a special Foundation program at which recent contributors are publicly introduced and recognized (e.g., a Paul Harris Fellow or Benefactor Recognition presentation or dinner).

In January 1957, the Foundation formally launched Paul Harris Fellow Recognition in memory of the founder of Rotary, and 12 individuals were recognized in the first year. As contributions increased, so did the number of Paul Harris Fellows. It grew to 100,000 by 1984, and reached 250,000 by 1989. In October 1995, the number of Paul Harris Fellows surpassed the 500,000 mark, when six persons, one from each of the six Rotary regions, were chosen to symbolize that milestone. Currently there are more than 690,000 Paul Harris Fellows.

By far the largest number of Paul Harris Fellows are Rotarians devoted to supporting the programs of The Rotary Foundation. Many more contributions are made in the names of Rotary family members. Although clubs sometimes make contributions to recognize an individual member's longtime faithful service or outstanding success in a specific project, there are awards designed specifically for that purpose (see Chapter 7, "Service Awards").

A number of Rotary clubs also use Paul Harris Fellow Recognition as a way of honoring local, national or world leaders who have demonstrated commitment to the goals and purposes of the Foundation. A list of Paul Harris Fellows chosen at random is certain to include some well-known names — government leaders, scientists, artists, athletes and entertainers as well as someone who has served holiday dinners for the homeless every year for 25 years or has devoted a lifetime career helping to secure better housing for the community's low-income residents. All such selections serve three purposes: They honor a deserving individual, give important support to Foundation programs, and bring Rotary favorable public attention.

The New Rotary Foundation Sustaining Member Program

The newly revitalized Rotary Foundation Sustaining Member program encourages all Rotarians to support the Annual Programs Fund each year, even after they have named or become a Paul Harris Fellow.

At their June 1999 meeting, the Trustees defined what it means to be a Rotary Foundation Sustaining Member: "A Rotary Foundation Sustaining Member is a person who makes a minimum initial gift of \$100 or more and states in writing his/her intention to make a minimum gift of \$100 or more per year thereafter to the Annual Programs Fund."

Each Sustaining Member will be counted on the Club Recognition Summary when the donor completes The Rotary Foundation Sustaining Member Pledge Card. The total number of Sustaining Members associated with the Rotary club is shown at the top of the Club Recognition Summary. Only contributions toward the Annual Programs Fund will count toward Sustaining Member pledges.

Forms of Paul Harris Fellow Recognition

Paul Harris Fellow

Paul Harris Fellow Recognition is given, upon request, to an individual who contributes or in whose name is contributed \$1,000. A new Paul Harris Fellow will receive, upon request, a personalized certificate with presentation folder, a lapel pin and a medallion that is suspended from a neck ribbon. Both male and female Paul Harris Fellows receive the same recognition materials. To maintain the dignity of the recognition, only persons may be named Paul Harris Fellows — pets, animals, fictitious characters and/or inanimate objects may not be presented with the recognition.

The names of Paul Harris Fellows are listed on the Club Recognition Summary. Individuals with amounts greater than or equal to \$1,000 in the "Recognition Amount" column of the report are Paul Harris Fellows; some may be Multiple Paul Harris Fellows (see pages 63-64). The total number of Paul Harris Fellows associated with the Rotary club is shown at the top of the Club Recognition Summary.

Most Paul Harris Fellow Recognition credits are earned as a result of contributions made to the Annual Programs Fund (unrestricted). However, restricted contributions to the World Fund also earn Paul Harris Fellow Recognition credit. Additionally, the following restricted contributions are eligible for Paul Harris Fellow Recognition credit **if the funds are flowed through The Rotary Foundation:** PolioPlus, PolioPlus Partners, sponsor portions of approved Matching Grants, sponsor portions of approved 3-H Grants, and sponsor portions of approved Helping Grants.

Paul Harris Fellow Recognition can be requested by completing The Rotary Foundation Recognition/Contribution Form (123-EN), available through your RI service center or by download from the RI Web site at www.rotary.org.

Transferring Paul Harris Fellow Credit

Individuals who have not completed their Paul Harris Fellow requirements and have a recognition amount less than \$1,000 may transfer this credit to another individual by signing a completed Recognition Transfer Request Form (102-EN). The club president does not have the authority to transfer credit from former or deceased members. However, additional funds may be added to the account, if the club wishes to name the individual a Paul Harris Fellow posthumously.

Multiple Paul Harris Fellow

When an existing Paul Harris Fellow makes a \$1,000 contribution to the Annual Programs Fund of The Rotary Foundation, he/she will receive, upon request, a Paul Harris Fellow pin with one sapphire. Each additional \$1,000 contribution to the Foundation by a Paul Harris Fellow will entitle the donor to receive, upon request, a new pin up to a maximum \$9,999.99. In addition, for each such \$1,000 contribution, he/she may designate another person as a Paul Harris Fellow.

Recognition levels are determined based on the following guidelines:

RECOGNITION AMOUNT	MPHF RECOGNITION LEVELS	PIN MPHF IS ELIGIBLE TO WEAR
\$2,000 to 2,999.99	PHF + 1	one sapphire
\$3,000 to 3,999.99	PHF + 2	two sapphires
\$4,000 to 4,999.99	PHF + 3	three sapphires
\$5,000 to 5,999.99	PHF + 4	four sapphires
\$6,000 to 6,999.99	PHF + 5	five sapphires
\$7,000 to 7,999.99	PHF + 6	one ruby
\$8,000 to 8,999.99	PHF + 7	two rubies
\$9,000 to 9,999.99	PHF + 8	three rubies

Foundation Recognition Points

When an existing Paul Harris Fellow donor makes a contribution and does not name a recipient at the time a contribution is made, the credit generated from the contribution is referred to as "Foundation Recognition Points." These points are credited to the donor's account, as reported in the "Foundation Recognition Points" column of the Club Recognition Summary. It is important to note that the Foundation Recognition Points that are shown on the Club Recognition Summary for a Paul Harris Fellow are already included in that Paul Harris Fellow's "Recognition Amount" column. However, if an individual has a Recognition Amount less than \$1,000 and has Foundation Recognition Points, the points are *not* included in his/her Recognition Amount.

Foundation Recognition Points also accrue in the club or district contribution account anytime the club or district submits a contribution to the Annual Programs Fund, PolioPlus Fund or World Fund, and (if the contribution is flowed through the Foundation) to PolioPlus Partners, an approved 3-H Grant, Matching Grant, or Helping Grant, and does not name a recipient for the recognition credit at the time the contribution is made. Club and District Foundation Recognition Points can be found under "Club Contributions" on the Club Recognition Summary.

Continuing support of the Annual Programs Fund is important to the success of The Rotary Foundation's many programs. The Trustees encourage Rotarians and clubs to make additional contributions of \$1,000 to honor friends, family members, and other Rotarians with Paul Harris Fellow Recognition.

The Trustees' policy allows transfers from an individual's Foundation Recognition Points, with the signature of the individual, via the Recognition Transfer Request form. If the individual's signature is unobtainable, the club president or the district governor may authorize the transfer. However, if a signature is not obtained from the individual from whom Foundation Recognition Points are being transferred and that individual wishes to utilize these credits at a later date, the Rotary club or district must reimburse the Foundation for the full amount that was transferred.

Club and district Foundation Recognition Points may be transferred to individuals using the Recognition Transfer Request form. In this instance the form must be signed by the club president or district governor.

Foundation Recognition Points are tracked in perpetuity and there is no time limit in which they must be transferred.

Certificate of Appreciation

Sometimes a donor contributes \$1,000 and wishes to recognize a business or other organization. Since Paul Harris Fellow Recognition can only be presented to individuals, the Certificate of Appreciation provides a popular alternative. Recipients of a Certificate of Appreciation receive a certificate and diploma cover only.

Contribution and Recognition Reports

Starting in mid-August of each Rotary year, district leaders receive from The Rotary Foundation reports on contributions and recognition for their district. The following reports are sent regularly to the district governor, the District Rotary Foundation Committee chairperson, and the Annual Giving Subcommittee chairperson:

- Monthly Contribution Report
- Club Recognition Summary (three times per year)

The chairperson of the district's Annual Giving Subcommittee is responsible for distributing these reports to the clubs in the district. Occasionally, Club Recognition Summaries may be sent directly to the clubs. On those occasions, the chairperson of the Annual Giving Subcommittee will be notified that forwarding copies to the clubs is not necessary.

Club Recognition

Each year, the Trustees present club recognition banners to the three clubs in each district with highest per-capita Annual Programs Fund contributions and to the three clubs in each district with highest total Annual Programs Fund giving.

Membership figures are based on each club's most recent semiannual report. For clubs established after the semiannual report date, initial membership figures are used. Per-capita figures are calculated based on Annual Programs Fund contributions only.

Clubs wishing to track all-time contributions to the Foundation will find this information on the Club Recognition Summary, which is available from the district Annual Giving Subcommittee chairperson.

These reports provide an excellent fund development tool for clubs and districts. Questions about information on the reports can be directed to the Donor Services staff at World Headquarters or the RI service center for your area.

Recognition for 100% Paul Harris Fellow Rotary Clubs

Rotary clubs that are certified as having 100 percent of all dues-paying members as Paul Harris Fellows are now eligible to receive a special recognition banner as approved by the Trustees. This recognition will be granted one time only upon initial certification by the district governor and confirmation by The Rotary Foundation. The governor must research each Rotary club's 100% Paul Harris Fellow status and request the recognition in writing. The 100% Paul Harris Fellow Club will also have its name and the year of the award placed on a recognition plaque displayed in the Hall of Honor at World Headquarters.

Resources

- A Guide to Annual Giving (142-EN)
- Rotary Foundation Facts (159-EN)
- You and Your Rotary Foundation (171-EN)
- Two Needs, Two Ways of Giving (173-EN)
- 1999-2000 Rotary Foundation Annual Report (187B-EN) — available December 2000
- The Rotary Foundation Recognition/Contribution Form (123-EN)
- Recognition Transfer Request Form (102-EN)
- Memorial Envelopes (111-EN), for Canada (112-EN)
- Fund Raising Resource Guide (256-EN)
- TRF Mission (147-EN)
- Your Gift Belongs Here poster (127-EN)
- Annual Programs Fund video (122C-EN), *English and French only*

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. Some can also be downloaded from the RI Web site at www.rotary.org.

Planned Giving/ Major Gifts Subcommittee or Permanent Fund Subcommittee

Most districts have a Planned Giving/Major Gifts Subcommittee. In the USA and Canada, this subcommittee and its role have been assumed by the Permanent Fund Subcommittee as part of the Permanent Fund Initiative.

The Planned Giving/Major Gifts Subcommittee or the Permanent Fund Subcommittee is responsible for securing Benefactor commitments and soliciting major gifts from those individuals capable of making them to build the Permanent Fund.

Importance of the Permanent Fund

The Rotary Foundation Trustees, Directors of Rotary International, and Council on Legislation have established the development of the Permanent Fund as a priority of Rotary International. A large, secure Permanent Fund can provide an additional source of income to help fund Foundation programs for years to come.

The objective of The Rotary Foundation Permanent Fund is to provide a predictable and secure supplement to annual Foundation support, thereby guaranteeing a minimum level of program activity and facilitating new or expanded programs in the future. Contributions to the Permanent Fund are not spent; rather, they are invested and only a portion of the earnings generated by these gifts are used to support Foundation programs.

Specific Responsibilities

The success of a district Planned Giving/Major Gifts Subcommittee and Permanent Fund Subcommittee is directly related to the enthusiasm and expertise of its members, the quality of information they receive and disseminate, and the direct communication the committee members have with their fellow Rotarians. These committees should be comprised of at least three members, one of whom might be a past district governor. Appointing a Rotarian with professional expertise in fundraising, sales, marketing, public relations, or a financial field to serve on the subcommittee, ideally as its chair, is highly recommended. In general, subcommittee members should be appointed for a term of three years, with the terms of different members overlapping, to provide for consistency in the subcommittee's planning and leadership.

The specific responsibilities of the Planned Giving/Major Gifts Subcommittee include:

- Working with the district governor and District Foundation Committee to set district Benefactor goals;
- Involving the district governor, Annual Giving Subcommittee, District Foundation Committee chairperson, Regional Rotary Foundation Coordinator, current and/or past Trustees and Directors, alumni, and Major Donors in the planning and solicitation of major gifts prospects;
- Identifying, cultivating, and soliciting potential donors of major outright gifts or planned gifts in support of the Foundation's Permanent Fund; and
- Thanking and continuing to nurture relations with Benefactors and Major Donors.

To carry out these tasks, the committee should:

- Inform Rotarians of Planned Giving opportunities available in those countries which allow the donor to make a significant gift while receiving estate and/or income tax deductions and, under some arrangements, a life income interest as well.
- Work with club presidents to schedule programs on the Foundation and the Permanent Fund. Recognize current Benefactors; individuals who have already made a commitment to the Permanent Fund are good examples to put before other Rotarians.
- Keep in contact with those who have already made commitments and have been recognized as Benefactors, and encourage them to be part of your solicitation team to identify additional Benefactors.
- Coordinate with the Annual Giving Subcommittee chairperson promotional and solicitation efforts concerning outright gifts to the Permanent Fund.

Types of Gifts and Ways to Give

Major Gifts

The quest for major gifts has become the focus of increased activity in recent years and they can be given in a variety of ways: cash, pledges, and planned gifts. The Foundation encourages districts to identify and cultivate donors who are financially capable of considering a significant charitable gift.

The Trustees have approved major gift recognition for cumulative giving beginning at \$10,000. The Planned Giving/Major Gifts Subcommittee is encouraged, however, to focus its efforts on identification and solicitation of prospects capable of making a minimum \$25,000 gift.

Major gifts can be made to the Annual Programs Fund or the Permanent Fund. In either case, the donor may opt to designate the gift to the Trustee-directed World Fund or *SHARE* District Designated Fund. Donors must be asked how they would like to see their funds used.

A gift that is not further designated provides the maximum flexibility for future needs. However, opportunities exist for donors who may wish to designate their gifts to a particular type of program or a specific geographic area.

Named and Endowed Opportunities

In 1982, The Rotary Foundation Trustees established a unique way for individuals, corporations, and foundations to take a personal and active role in helping to further the Foundation's goals: Named and Endowed Scholarships. These scholarships provide for the cost of tuition, travel expenses, and a living stipend for a scholar's full year of study, within the funding guidelines established by the Foundation Trustees.

It should be noted that donations of Named and Endowed Scholarships are credited as "restricted" contributions and are not included in a district's Annual Giving total.

A **Named Scholarship** is established by a one-time contribution in the full amount of a scholarship, the cost of which is currently \$25,000, the *SHARE* option cost of an Academic-Year scholarship in 2002-03 (the actual year of the award). The scholarship can be created by an individual, a corporation, or a foundation in the name of the donor or someone the donor chooses to honor. However, clubs and districts may not pool contributions to create a Named Scholarship. Contributions to a Named Scholarship are eligible for Paul Harris Fellow and Sustaining Member Recognition.

An **Endowed Scholarship** can be established with the contribution of \$150,000 or more from an individual donor or \$250,000 if the gift represents a "pooled" contribution of several individuals. This creates a special endowed fund for scholarships. The principal of this gift is never spent. The spending portion, as directed by Trustee policy, is accrued and a new scholarship is awarded when the accruals reach the necessary *SHARE* scholarship cost. The more flexible the terms of the scholarship, the more adaptable it is likely to be in meeting future needs. However, the donor may designate the districts or countries and fields of study to be involved in the selection of an Endowed Scholar.

For specific information on how to establish an Endowed Scholarship, contact the Fund Development Field Services staff of The Rotary Foundation.

Other Endowed Opportunities

- \$25,000 (minimum) will establish a named fund from which earnings can be directed to either the District Designated Fund or the World Fund.
- \$50,000 (minimum) may be designated to support an approved program of the Foundation (e.g., The Joe and Jane Rotarian Matching Grants Fund).
- \$150,000 (minimum) will fund the establishment of a named fund to support a project within an approved Foundation program.
- \$1,000,000 (minimum) may fund a new program and/or activity of the Foundation within Trustee guidelines.

Corporate/Foundation Gifts

Corporate/Foundation gifts may be directed to the Permanent Fund. See *Corporate/Foundation Solicitations* and *Corporate Matching Gifts* in the *Annual Giving Subcommittee* section, pages 60-61.

Noncash Contributions

Contributions of publicly traded securities and other noncash items (including real estate and any life-income gift or transfer in trust) are valued and credited according to guidelines and principles articulated by the US Internal Revenue Service.

Donors wishing to make such gifts should contact the Fund Development Field Services or Gift Acceptance staff of The Rotary Foundation at World Headquarters.

Planned Gifts

A planned gift is, by definition, one legally provided for during the donor's lifetime, but whose principal benefits do not accrue to The Rotary Foundation until sometime in the future, usually at the death of the donor and/or income beneficiaries designated by the donor. With some of these types of charitable gifts, the donor retains some present interest (usually an income interest) in the assets, and directs the remainder for the ultimate benefit of the Foundation. In addition, the donor of the gift often achieves significant reductions of income, capital gains, and estate taxes.

The Trustees have directed that, unless otherwise indicated, the proceeds from planned gifts will be placed in the Foundation Permanent Fund and the earnings will be credited to the World Fund. Donors may designate that the earnings from their gift be credited to the District Designated Fund.

Rotary International encourages Rotarians to consider providing special support to the Permanent Fund as a celebration of Rotary's approaching centenary (in 2005), and as a demonstration of commitment to Rotary as a movement for the centuries and a world leader in International Service.

The Foundation encourages all donors to seek their own legal and financial counsel. The examples used in this handbook are based on US tax laws.

NOTE: The tax and estate planning aspects reviewed here briefly are as generally applicable in the United States from a Federal income and transfer tax perspective. Some other countries permit comparable types of planned gifts, and some permit different types of planned gifts. The Foundation encourages all donors to seek professional legal, estate planning, and financial advice.

Bequests and Gifts through Wills

Bequests — In the USA, this is the best known form of planned gift. Cash, securities, real estate or property of any description may be given to The Rotary Foundation through an individual's will. The donor retains full control and use of the property during his/her lifetime. When the will is probated, the gift to the Foundation qualifies for a charitable deduction in computing estate taxes in the USA. In other countries, similar deductions may be available as determined by local laws.

Testamentary Trust — A testamentary trust provides for establishment of a charitable trust to become effective at the death of the donor. The donor may provide for designated individual income beneficiaries and ultimately make a gift to the Foundation.

Life Income Gifts

Pooled Income Fund — In The Rotary Foundation Pooled Income Fund, gifts of cash, securities, or both are pooled for investment with those of many other persons, similar to a mutual fund. The donor (and/or income beneficiary) receives a proportionate share of the earnings for life. The donor receives a charitable tax deduction, can avoid capital gains tax, and can reduce his/her estate taxes. Minimum: \$5,000.

Charitable Gift Annuity — In exchange for an irrevocable transfer of at least \$10,000, the Foundation will guarantee an annual income to one or two people designated by the donor. In the United States and some other countries, there can be an immediate income tax deduction for a charitable gift and a portion of the annual income return can be free from tax.

A variant is the deferred charitable gift annuity. In this case, the date for the start of annuity payments is deferred from the contract date by at least one year. This offers a younger donor an opportunity to take advantage of the tax benefits of such a gift.

Charitable Remainder Trusts — The donor transfers money, property, or both to the Foundation, which invests the assets as a separate fund. The donor receives either a variable income (the unitrust) or a fixed dollar amount (the annuity trust). This may reduce or eliminate capital gains on appreciated assets, and can provide an immediate income tax deduction. It is also possible to establish a tax-exempt income for beneficiaries. Minimum: \$100,000.

Life Insurance

A donor may assign ownership of a new or existing life insurance policy to The Rotary Foundation or may simply name the Foundation as beneficiary of the proceeds. When ownership of a policy is transferred, the donor may receive an income tax deduction for the value of the policy at the time the gift is made and for subsequent premium payments. The Foundation encourages donors to meet with their legal and financial advisors to discuss giving options best suited for their individual needs.

The Foundation will accept ownership of, as well as beneficial interest in, a fully paid-up life insurance policy which requires no further administrative intervention, with the commitment implied that it will generally be held to maturity. Minimum face value of such policies is \$1,000. Recognition for a fully paid-up irrevocable life insurance policy written on the life of an adult donor shall be based on the greatest determinable value of such a policy (usually the “face value”).

A fully paid-up irrevocable life insurance policy written on the life of an individual under the age of 21 and which has a minimum cash value of \$1,000 shall be eligible for Benefactor Recognition, and any other recognition shall be based on the “cash value” of the policy. Benefactor Recognition shall be given only to the insured. If the insured is not the donor or the donor’s spouse, the minimum face value of the life insurance policy must be at least \$10,000.

The Foundation will also accept ownership of life insurance policies with a minimum face value of \$5,000, upon which premium installments remain to be paid. Recognition is based on the current cash value of the policy at the time of the gift, as well as any subsequent premiums paid. These revised guidelines do not affect gifts of insurance made prior to February 1996, when the Foundation Trustees revised the guidelines for accepting life insurance policies.

Other Planned Gifts

Retained Life Estate in a Residence or Farm — The owner of a residence or farm may give the property to The Rotary Foundation, claim an income tax deduction for the charitable remainder, and retain use of the property for him- or herself and/or another. A portion of the residence or farm value may be excluded from estate taxation.

Lead Trusts — Lead trusts are written for a term of years with the Foundation to receive income from the trust until its termination, after which the trust assets revert to the donor, his/her beneficiary, or the donor's estate. If the trust meets the qualifications of a unitrust or an annuity trust, the donor can take a charitable deduction from income tax based on the amount of income the Foundation can expect to receive from the trust.

Suggested Planned Giving Procedures

- **Set a goal for Permanent Fund support** from the district and publicize the goal at a district conference and/or assembly. Goals may be based on the number of new Benefactors identified in each club. Recognize Permanent Fund donors in district Foundation newsletters or at special district conference and assembly programs.
- **Design and implement an educational program** to inform Rotarians about the Permanent Fund and their ability to perpetuate its support through a bequest or other arrangement naming The Rotary Foundation as beneficiary of an estate plan. Conduct districtwide presentations or seminars explaining the various forms of planned giving. Distribute the brochure *Two Needs, Two Ways of Giving* (173-EN), which explains the need for both Annual Programs Fund and Permanent Fund support.
- **Ask club presidents to allow you to conduct programs** on the Foundation and the Permanent Fund. Recognize current Benefactors; individuals who have already made a commitment to the Permanent Fund are good examples to put before other Rotarians.
- **Keep in contact with those who already have made commitments** and have been recognized as Benefactors, and encourage them to be part of your solicitation team to identify additional Benefactors.
- **Coordinate promotional and solicitation efforts** with the Annual Giving Subcommittee chairperson concerning outright major gifts to the Permanent Fund.

Permanent Fund Benefactor Recognition

The Rotary Foundation recognizes as a Benefactor anyone who informs the Foundation in writing that he or she has made provision in his or her will or other estate plan naming the Foundation's Permanent Fund as a beneficiary; or anyone who makes an outright gift of \$1,000 or more to the Permanent Fund.

Each Benefactor initially receives a distinctive certificate, as well as an insignia which can be worn in conjunction with a Paul Harris Fellow or other appropriate pin. There are not levels of Benefactor Recognition and recognition is permanent.

The principal amount of a Permanent Fund gift, including the present value of any gift of future interest irrevocably transferred to the Foundation by trust, contract, insurance policy

arrangement, or other means, is credited to the donor for major gift recognition and club recognition purposes.

If the Foundation is made the sole owner and beneficiary of a life insurance policy with an absolute right to borrow against such policy, the insured will be recognized as a Benefactor. Recognition for a fully paid-up irrevocable life insurance policy which is written on the life of an adult donor shall be based on greatest determinable value of such a policy (usually the “face value”), as long as the minimum cash value thereof is \$1,000. A fully paid-up life insurance policy written on the life of an individual under the age of 21 and which has a minimum cash value of \$10,000 shall be eligible for Benefactor Recognition for the insured.

Neither the earnings from nor the principal amounts of Permanent Fund gifts are credited for Paul Harris Fellow or Sustaining Member Recognition purposes. The earnings on Permanent Fund gifts may be credited to the district for *SHARE* calculation purposes if the donor specifies that the earnings be directed through *SHARE*.

The Rotary Foundation Bequest Society

At their October 1999 meeting the Foundation Trustees approved The Rotary Foundation Bequest Society. Those who inform the Foundation they have made a major gift commitment in their final estate plan will be extended recognition through the newly established society.

A new and standard-sized Bequest Society Recognition crystal has been authorized, along with a diamond pin (an additional diamond for each contribution range) that corresponds to the current six levels of major gift recognition.

Benefactor Reports

The Rotary Foundation sends the chairs of the Permanent Fund Subcommittee biannual reports on Benefactors in their districts. In addition, district governors, Foundation chairs, Annual Giving Subcommittee chairs, and clubs receive periodic information on Benefactors with the Club Recognition Summary.

Major Donor/Major Gift Recognition

The Rotary Foundation recognizes as a Major Donor any individual who makes an outright or cumulative contribution of \$10,000 or more to the Annual Programs Fund and/or the Permanent Fund.

The principal amount of a planned gift, including the highest determinable value of any gift of future interest irrevocably transferred to the Foundation by trust, contract, insurance policy arrangement, or other means, is credited to the donor for major gift recognition and club recognition purposes.

The Foundation Trustees have identified the following contributions as qualifying for such recognition:

- PolioPlus contributions that have not already received PolioPlus major gift recognition;
- All other outright gifts, both restricted and general;

- The greatest determinable value of net transfers to unitrusts, annuity trusts, charitable gift annuities, and pooled income funds that are irrevocably committed to the Foundation; and
- The greatest determinable value of any paid-in-full whole life or universal life insurance policy given to the Foundation as sole owner and beneficiary for an individual over the age of 21.

The Trustees established six levels of giving for Major Donor Recognition:

- Level 1 — \$10,000 to \$24,999
- Level 2 — \$25,000 to \$49,999
- Level 3 — \$50,000 to \$99,999
- Level 4 — \$100,000 to \$499,999
- Level 5 — \$500,000 to \$999,999
- Level 6 — \$1 million and above

Donors at all six levels receive a special acknowledgment from the Trustees and the option of receiving an engraved crystal piece. Whenever possible, special presentations at Rotary International events will be made to Major Donors. Because contributions accumulate, donors are recognized as they reach each successive level.

Diamond Circle Pins have been added as a form of Major Donor Recognition. Donors are entitled to a one-diamond stone pin for cumulative Annual Programs Fund and/or Permanent Fund contributions totaling over \$10,000. Donors are entitled to a two-diamond pin for cumulative contributions over \$25,000, a three-diamond pin for contributions over \$50,000, a four-diamond pin for contributions over \$100,000, a five-diamond pin for contributions over \$500,000, and a six-diamond pin for contributions over \$1 million.

Major Donors whose cumulative contributions exceed \$250,000 may have their photograph permanently displayed in the Rotary Hall of Honor at World Headquarters in Evanston, Illinois. Major Donors who reach levels two through six will be permanently listed in the Hall of Honor.

Donors who name The Rotary Foundation as the eventual recipient of irrevocable charitable gifts of qualifying size will be recognized as Major Donors.

Resources

- The Rotary Foundation Major Gift Guide (available from the Fund Development staff at World Headquarters)
- Ways of Giving (185-EN)
- Securing the Future — Your Bequest to The Rotary Foundation (183-EN)
- Gifts of Life Insurance (152-EN)
- The Rotary Foundation Pooled Income Fund (154-EN)
- Benefactor Commitment Card (149-EN)
- The Gift That Keeps on Giving videotape (321-EN), *English only*
- Planned Giving in Canada (045-EN)
- Two Needs, Two Ways of Giving (173-EN)

- 1999-2000 Rotary Foundation Annual Report (187B-EN) — available December 2000
- The Charitable Gift Annuity (104-EN)
- Named Funds (110-EN)
- Life Income Agreements (109-EN)

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. Some can also be downloaded from the RI Web site at www.rotary.org.

Scholarships Subcommittee

The Rotary Foundation's oldest and best-known program is **Ambassadorial Scholarships**. The program is one of the largest privately funded international scholarship programs, sending approximately 1,200 participants to study worldwide each year. The **Rotary Grants for University Teachers** program is now considered part of the Foundation's Educational Programs, and the Scholarships Subcommittee chairperson is asked to assume the responsibilities for this program.

Districts may also wish to place responsibility for recruitment of the **Rotary World Peace Scholar** candidates under the auspices of their Scholarships Subcommittee. Alternatively, the district governor may wish to appoint an additional Rotarian or group of Rotarians to head up **Rotary World Peace Scholarship** efforts in the district.

Specific Responsibilities

The Scholarships Subcommittee should include at least three members. Since the scholarship selection process takes place a year before the year of study, it is recommended that the subcommittee maintain continuity over two Rotary years: the year of application and the year of study. Therefore, the subcommittee should be selected by the district governor cooperatively with the district governor-elect. Both serve as ex-officio members of the subcommittee.

Without Rotarian participation, the Scholarships program would provide students with funding assistance only. With your guidance, the program will continue to produce Rotary Foundation Ambassadorial Scholars — men and women with the education, compassion, and understanding to provide solutions to human needs.

Through careful attention to four basic elements — Promotion and Selection, Orientation, Hosting Scholars, Alumni Outreach — Rotarians can help achieve the program objectives identified on the next page. With these four elements in mind, the major responsibilities of the Scholarships Subcommittee are to:

- Work with the district governor, district governor-elect, immediate past district governor, and District Foundation Committee chairperson to determine the amount of District Designated Funds (DDF) the district should allocate to the Educational Programs Category through the *SHARE* system. The amount of DDF allocated should reflect the general types of Ambassadorial Scholarships and Grants for University Teachers the district would like to offer.

- Distribute application materials to clubs within the district. Notify clubs of the types of Foundation scholarships and Grants for University Teachers the district could fund through the *SHARE* system, based on the amount of DDF allocated to the Educational Programs Category.
- Promote the Foundation's Ambassadorial Scholarships and Grants for University Teachers programs.
- Select qualified scholars and grant recipients from club-endorsed candidates.
- Plan and conduct orientation for all scholarship and grant recipients before their departure and upon their arrival; participate in multi-district orientations where possible.
- Provide guidance and training to sponsor counselors appointed by sponsor clubs for each recipient. (Counselor is expected to provide orientation on Rotary, monitor recipient's progress, and invite recipient to Rotary meetings and functions, etc.)
- Maintain contact with recipients during the study year.
- Encourage timely submission of reports to sponsor and host district governors and the Foundation.
- Publicize the recipients' return to the media and to Rotarians in the district.
- Connect recipients with the district alumni chairperson.
- Maintain ties with recipients upon their return.

The subcommittee also should be actively involved in working with *incoming* Foundation scholars, orienting them, and ensuring that they are invited to visit and address Rotary clubs in the host district. In addition, the subcommittee should assist the DGE in assigning host counselors and training them for this position. **More information on the Scholarships Subcommittee's responsibilities can be found in the *Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers* (012-EN).**

Specific Program Information

Rotary Centers for International Studies in Peace and Conflict Resolution

The Rotary Centers for International Studies in Peace and Conflict Resolution is Rotary's newest educational program initiative. The Rotary Foundation has identified the program as **a major educational priority** in achieving its mission for world peace and understanding. Through partnerships with outstanding universities, seven Rotary Centers for International Studies are being established throughout the world. The Rotary Centers for International Studies program builds on the strengths of the Ambassadorial Scholarships program through these university partnerships and by providing educational opportunities focused on peace and conflict resolution.

Seventy Rotary World Peace Scholars will be selected on a world-competitive basis each year to study for two academic years in graduate programs leading to a master's degree related to peace and conflict resolution. The first group of scholars will begin their studies in 2002-03, at one of seven centers hosted by the following universities:

International Christian University, Mitaka, Tokyo, Japan
University of Queensland, Brisbane, Queensland, Australia
University of Bradford, West Yorkshire, England
Sciences Po, Paris, France
Duke University and University of North Carolina at Chapel Hill, USA
University of California-Berkeley, USA
Universidad del Salvador, Buenos Aires, Argentina

Purposes of the Program

The Rotary Centers for International Studies are established for the following purposes:

- To advance research, teaching, and knowledge on issues of peace, goodwill, causes of conflict, and world understanding.
- To provide advanced educational opportunities for a group of Rotary World Peace Scholars, chosen from various countries and different cultures, in order to advance knowledge and world understanding among potential future leaders of government, business, education, media, and other professions.
- To establish a program through which The Rotary Foundation and Rotary clubs may become increasingly effective in promoting greater tolerance and cooperation among peoples, leading to world peace and understanding.

The Importance of Rotarians' Support

Unlike other scholarship options, this DDF allocation will not be associated specifically with a scholar selected by the district. Instead, districts are encouraged to support the Rotary Centers program by providing funds from their DDF to fund the 70 scholars selected on a world-competitive basis. All districts are encouraged to allocate some amount to support this global Rotary effort. Allocations in any amount are welcome. Districts that commit funding from their DDF equal to \$50,000 in one year or \$25,000 in two years to support a Rotary World Peace Scholar selected for study in the 2002-04 or 2003-05 year will be designated as "Rotary Centers Pioneer Districts" and will be appropriately recognized.

Districts are especially encouraged to consider allocating unspent DDF intended for Educational Programs. For example, every year nearly \$4 million in unused scholarship funds (the difference between *SHARE* cost and actual scholar expenses) are credited back to individual DDF accounts.

Every district is encouraged to seek out and endorse qualified candidates to compete for one of the 70 scholarships. It should be noted that the money contributed from DDF accounts is intended to support the 70 scholars selected on a world-competitive basis. Therefore, the DDF allocation made by a district is not connected to a specific scholar from that district. For that reason, if the candidate endorsed by the district is not selected, the money will not revert back to the district. This funding approach will ensure a balanced and truly competitive selection process for the top 70 candidates worldwide, regardless of whether their districts can afford to fund them for the two-year program.

For more information on district responsibilities and program procedures, please consult the publication, *Rotary Centers for International Studies Program Guide for Rotarians* (085-EN), which will be available in November 2000.

Ambassadorial Scholarships

The Ambassadorial Scholarships program supports the mission of The Rotary Foundation to further understanding and world 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;
- Impacting 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; and
- Fostering a lifelong association between Rotary and its scholars.

SHARE Option Scholarships

For program year 2001-02, districts could allocate District Designated Funds for any of the three following Ambassadorial Scholarships:

- **Academic-Year Ambassadorial Scholarship.** Candidates may be of any age as long as they have completed two years of university study or appropriate professional experience prior to the commencement of the scholarship. This award is intended to help cover tuition, fees, room and board, limited language training (as assigned by The Rotary Foundation), and transportation up to a specified financial limit for one academic year of full-time study in another country. **That limit is \$23,000 in 2000-01 and \$25,000 in 2001-02.** (This does *not* mean that all scholars will receive \$25,000. It *does* mean that scholars will receive *no more* than that amount.) This financial limit applies to *SHARE* scholarships as well as Named and Endowed Scholarships.

When scholars are assigned to more expensive schools, most or all of the scholarship amount may be committed to tuition at the assigned study institutions. Scholars will then be responsible for covering all other costs through personal funds or additional scholarships. All candidates must be fully informed of this policy and their related responsibilities. Scholars who cannot supplement their scholarship with personal funds should request study institution assignments where the total costs are well under the financial limit.

- **Multi-Year Ambassadorial Scholarship.** Either a two- or three-year award, this scholarship is intended to help defray the costs of obtaining a degree in another country. This scholarship provides a flat grant of \$11,000 per year in 2000-01 and \$12,000 in 2001-02. Eligibility requirements for Multi-Year Ambassadorial Scholarship candidates are the same as those for Academic-Year Ambassadorial Scholarship candidates, with the additional requirement that candidates must be committed to the pursuit of a specific academic degree. Please note that the three-year Multi-Year Ambassadorial Scholarship will not be available beginning in program year 2002-03.
- **Cultural Ambassadorial Scholarship.** This may be either a three- or six-month award for **intensive language training and cultural immersion** in another country. Applications will be considered for candidates interested in studying Arabic, English, French, German, Hebrew, Italian, Japanese, Korean, Mandarin Chinese, Polish, Portuguese, Russian, Spanish, Swahili, or Swedish. Applicants interested in studying a language not listed

on the application may request that language if they can help identify an appropriate language-training institution in a country where that language is spoken. Eligibility requirements for Cultural Ambassadorial Scholarship candidates are the same as those for Academic-Year Ambassadorial Scholarship candidates, with the additional requirement that candidates have at least one year of university-level training or equivalent experience in their preferred language. This award provides tuition and fees, homestay accommodations or reasonable room and board, and round-trip transportation. In 2000-01 and 2001-02, there will be financial limits of \$10,000 and \$12,000, respectively, for a three-month scholarship; and \$17,000 and \$19,000, respectively, for a six-month scholarship.

- The **Japan Ambassadorial Scholarship** is available for districts in Japan only to donate to another Rotary district on a pilot basis. Japanese districts may allocate their DDF toward a 12-month scholarship for language study in Japan with the possibility for a concurrent internship. The Trustees have strongly encouraged the districts in Japan to donate these special scholarships to districts in low-income countries. If a Japan Ambassadorial Scholarship is donated to your district, the Foundation will provide you with additional information on promoting the scholarship and selecting candidates.

DDF adjustment for lower-cost scholarships

In response to inquiries from Rotarians worldwide, the Trustees adopted a plan which credits each district with the difference between the original *SHARE* DDF cost for an Ambassadorial Scholarship and the actual amount of an individual scholarship.

All adjustments from the program year are returned to the districts once a year and not on a rolling basis. Adjustments for 1999-2000 scholarships will appear on the November 2000 *SHARE* Program Allocation Report for allocation toward 2002-03 programs.

Number of Scholarships a District May Seek

Each November, the district will receive a *SHARE* System Allocation Report, which will provide information to the district regarding the total amount of DDF available to be used for participation in Foundation programs. The report will also show the availability of any Named or Endowed Scholarships funded by donor restricted gifts within the district.*

The district may choose to allocate a portion of its available DDF to the Educational Programs Category to fund Ambassadorial Scholarships and Rotary Grants for University Teachers. Allocations to the Educational Programs Category are made in lump sums, but should reflect the number and types of awards the district would like to offer. For example, if for program year 2002-03 the district would like to award two Academic-Year Ambassadorial Scholarships, it should allocate \$50,000 to the Educational Programs Category. Likewise, the district should publicize to its clubs that it will award two Academic-Year Ambassadorial Scholarships and that each club should select one candidate for each award. If at the time of interviews the district finds that one of the top two candidates is seeking a different scholarship type, the district is not restricted to the original plan, as long as the total amount needed to sponsor the selected scholar does not exceed the amount of DDF allocated to the Educational Programs Category. **Check with your district governor or District Foundation Committee chair to determine the amount of DDF allocated to the Educational Programs Category.**

***NOTE:** Endowed Scholarships are not automatically available each year but only when sufficient earnings have been generated to underwrite the cost of the scholarship that year. You should promote the availability of an Endowed Scholarship only when specifically notified by the Foundation that the scholarship is available.

Donated Scholarships

Through scholarship donations, districts can help achieve an important objective of the Ambassadorial Scholarships program: encouraging Rotarians worldwide to increase educational opportunities for scholars from 100 low-income countries. Scholarship donations also facilitate partnerships between districts, as both the donating district and recipient district are involved in the selection process.

If your district is the recipient of a donated scholarship, the governor and Scholarships Subcommittee chairperson will be advised in March (approximately six months prior to the application deadline). In the event your district does receive a donated scholarship, your district must work with the donating district to ensure an appropriate candidate is selected for the award.

In particular, the receiving district (i.e., the district to which the donation has been made) interviews and selects potential candidates for the award (based on the restrictions placed on the scholarship by the donating district). These applications are submitted to the donating district for selection of the successful candidate. The successful candidate's application, endorsed by both the receiving and donating district, is due at The Rotary Foundation by 1 October. In order to ensure a scholarship donation is successful (i.e., applicant meets restrictions, application is submitted by deadline), direct communication between the donating and receiving districts is necessary from the time the donation is made.

New! Scholarship Fund Pool for Low-Income Countries

The Trustees of The Rotary Foundation have approved a new initiative to provide more opportunities for low-income districts to sponsor scholars. As districts make their *SHARE* allocation decisions, they will have the option of donating any amount to a **Scholarship Fund Pool for Low-Income Countries** from which scholarships will be awarded exclusively to candidates from low-income areas. All districts, including low-income districts, are encouraged to donate some amount of DDF to the fund in order to reach a pool of \$500,000 in the first year, which will permit funding of at least 20 scholarship candidates from low-income countries. Scholarships provided by the pooled fund will be awarded on a world-competitive basis for any award type, including Vocational Training Scholarships for 3 to 6 months of hands-on, practical training.

At present, only 11 percent (fewer than 150) of the Ambassadorial Scholars originate from low-income countries each year. Therefore, the Scholarship Fund Pool for Low-Income Countries is aimed at helping to achieve one of the new objectives of the Ambassadorial Scholarships program: *encouraging Rotarians worldwide to increase the educational opportunities for scholars from low-income countries.*

The Scholarship Fund Pool for Low-Income Countries is a pilot program through 2003-04. It provides a way for districts to spend more of their DDF in small amounts. If a district cannot afford to donate an entire scholarship, it has the option of donating a smaller amount to achieve the same goals.

Promoting the Scholarships

The subcommittee should contact colleges, businesses, universities, vocational training institutions, and civic organizations in the district to publicize widely the availability of scholarships. The *Rotary Foundation Ambassadorial Scholarships Leaflet* (132-EN) explains the programs to potential applicants. The leaflet also functions as a poster for a bulletin board display. *Public Relations Possibilities* (259-EN) provides guidelines on promoting scholarship availability. Include information on your district's World Wide Web site, if it has one.

The Scholarships Subcommittee should encourage Rotary clubs to seek qualified candidates throughout the year.

Selecting Qualified Candidates

The Scholarships Subcommittee should read the *Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers* (012-EN). This publication provides information to help districts and clubs choose the best possible candidates. Also, it contains important, up-to-date information concerning changes in the Scholarships program.

A district may use numerous standards to evaluate a candidate for a Rotary scholarship, among them initiative, enthusiasm, adaptability, language proficiency, academic excellence, and sense of purpose. All candidates must demonstrate leadership potential as well as potential for being outstanding “ambassadors of goodwill” for Rotary. A district could give preference to candidates pursuing specific fields of study or interested in studying in low-income countries (see notes on Diversity in the *Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers* [012-EN]). All applicants should be fully informed about and understand the financial limit on scholarships. Most importantly, districts should select scholars who understand and support the program objectives.

The subcommittee should process applications, conduct interviews, and select scholarship candidates. Interviews should be conducted to confirm a candidate’s qualifications and foreign language ability. People who are fluent in the languages of candidates’ preferred study countries should participate in the interview. It is the subcommittee’s responsibility to verify the completeness and accuracy of each application.

Applications for replacement candidates, if selected, should be kept at the district level until needed. If a principal candidate relinquishes a 2001-02 award before 1 February 2001, the district will be notified and a replacement candidate for the same type of *SHARE* option can be submitted for study in the same program year. If a 2001-02 scholar relinquishes his/her award after 1 February 2001, the DDF funds committed for the award will revert back to the district for future allocation.

When the Scholarships Subcommittee has selected the appropriate number and types of candidates based on the district’s DDF allocation toward the Educational Programs Category, the district governor and subcommittee chairperson should certify the district’s endorsement on the application forms.

All candidates and their sponsoring clubs should be notified of the district’s choices for scholarship endorsement. Principal candidates should be informed that they have received only the district’s endorsement — *not the scholarship*. Replacement candidates should be informed that they will not be considered for a scholarship unless the Trustees deem a principal candidate unqualified or the principal candidate does not use the award. The Foundation will notify scholars no later than 15 December when their scholarship is confirmed.

Deadlines

Application deadlines for Ambassadorial Scholarships are set by individual Rotary clubs in accordance with the district deadline. Club deadlines may be as early as March (15 months prior to the award year) or as late as July (12 months prior to the award year). All district-endorsed applications must be received by The Rotary Foundation no later than 1 October (10 months prior to the award year). All applicants approved by the Trustees will receive confirmation of their study institution assignments by 15 December for study beginning in the next Rotary year.

Role of the Sponsor Counselor

The president of the sponsoring club must appoint a Rotarian sponsor counselor for each principal candidate and note that appointment on the candidate's scholarship application form. The sponsor counselor should:

- Contact the scholar and arrange a personal meeting.
- Ensure that the scholar has good knowledge of Rotary as an organization, the objectives of The Rotary Foundation, and his/her responsibilities as a goodwill ambassador and scholar.
- Attend district or multi-district orientation with scholars.
- Arrange the scholar's attendance at local club meetings, district functions, and other Rotary events.
- Review the financial aspects of the scholarship award so the scholar understands the Foundation's funding policies.
- Help the scholar contact his/her host counselor to become acquainted and write to both the scholar and host counselor during the scholarship.

A complete orientation program should be conducted for all outbound scholars in conjunction with district officials or as part of a multi-district effort wherever possible. A guide to conducting such a program is contained in the *Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers* (012-EN). Grants to support multi-district orientations are available through The Rotary Foundation.

Sponsor counselors should welcome scholars who have recently returned and put them in contact with the District Alumni Subcommittee chairperson. Returning scholars should be asked to give presentations to share their experiences with clubs in the district. The sponsor counselor should also help scholars schedule non-Rotary speaking engagements and invite them to attend the Rotary district conference. Every effort should be made to maintain long-term contact with scholar alumni even if they reside outside the sponsoring district.

Ambassadorial Scholars' Responsibilities

- All scholars should support the objectives of the Ambassadorial Scholarships program in fulfilling the mission of The Rotary Foundation.
- All scholars must understand that the primary purpose of the scholarship is to strengthen international understanding through study abroad. Only recipients of the Multi-Year flat grant awards are required to enroll in degree programs.
- Scholars function as unofficial ambassadors of goodwill for Rotary and their home countries.
- Scholars must complete all predeparture documents in a timely manner and comply with the conditions of their awards as outlined in the official Acceptance Form.
- Candidates must be prepared to study anywhere they are assigned by the Trustees.
- Candidates must be responsible for all costs beyond the amount of the scholarship.
- Scholars must speak before various Rotary and non-Rotary audiences, be available for media interviews at home and abroad, and participate in service projects.

Role of the Host Counselor

Governors-elect are asked to appoint host counselors for incoming scholars several months before the scholars arrive in the study country. It is the responsibility of this counselor to:

- Contact the scholar well in advance of his/her arrival.
- Counsel the scholar on housing opportunities in the study district and assist with application/admission procedures at the assigned school as necessary.
- Meet the scholar at the airport and help him/her to get acclimated to the study country.
- Attend district or multi-district orientation with the scholar.
- Establish ambassadorial goals. (The scholar should visit both Rotary *and* non-Rotary groups and become active in other Rotary projects.)
- Remind the scholar to submit a report two months after the start of the academic year.
- Review the funding policies of the scholarship award and monitor the use of funds, in particular the payment of tuition and fees to the university. The first scholarship payment will be sent care of the host counselor to deliver to the scholar upon his/her arrival. The second scholarship payment is sent directly to the scholar, provided all required documentation is received by The Rotary Foundation. (NOTE: Cultural Scholars generally receive only one payment.)
- Help the scholar become regularly involved in club and district projects.

NOTE: If a Cultural Ambassadorial Scholar will be studying in your district, the Foundation may ask your district to locate homestay accommodations for this scholar if the language school is unable to provide this service. Like Group Study Exchange and Rotary Youth Exchange, staying with families is considered an important aspect of the Cultural Ambassadorial Scholar's international experience.

Rotary Grants for University Teachers

Rotary Grants for University Teachers are awarded to higher education faculty to teach at universities in developing countries (other than their own). The purpose of these awards is to build international understanding and development while strengthening higher education in low-income countries. Fields taught must have practical use to the people of the host country and contribute to the socioeconomic development of that country.

Through *SHARE*, districts may allocate their District Designated Funds to sponsor these grants.

Two different levels of awards are available. Effective with program year 2001-02, districts may elect to award:

- \$12,500 for a service period of three to five months, or
- \$22,500 for a service period of six to ten months.

Grant recipients are responsible for making arrangements with their host teaching institutions, as well as securing leave from their current institution if applicable.

Number of Rotary Grants for University Teachers a District May Seek

Each November, the district will receive a *SHARE* System Allocation report, which provides information regarding the total amount of its DDF available for participation in Foundation programs.

The district may choose to allocate a portion of its available DDF to the Educational Programs Category to fund Ambassadorial Scholarships and Rotary Grants for University Teachers. Allocations to the Educational Programs Category are made in lump sums, but should reflect the number and type of awards the district would like to offer. For example, if for program year 2001-02 the district would like to award two 3-5 month Rotary Grants for University Teachers, it should allocate \$25,000 to the Educational Programs Category. Likewise, the district should publicize to its clubs that it will award two 3-5 month Rotary Grants for University Teachers and that each club may submit one candidate for each award. **Check with your district governor or District Foundation Committee chair to determine the amount of DDF allocated to the Educational Programs Category.**

Districts in low-income countries have expressed an interest in receiving University Teachers in their communities, but have wondered how they can communicate their need to other districts. Districts in low-income countries should be aware that they have the option, through the *SHARE* system, of bringing a University Teacher to serve at a local university by “donating” a University Teacher Grant to another district. The “donating” district pays for the grant through its District Designated Fund, and the partner district recruits a professor who can address specific teaching needs in the donating district.

Promoting Rotary Grants for University Teachers

The subcommittee should contact specific departments in colleges and universities to publicize widely the availability of the grants. The *Rotary Grants for University Teachers Leaflet/Application* (193-EN) explains the program to potential applicants. The leaflet also functions as a poster for a bulletin board display and contains the application.

While this newest Foundation educational program is meeting its objectives, several factors limit the program’s potential for far greater success. Those factors include absence of clearly specified and well-publicized teaching needs in host countries, recruiting difficulties in sponsoring districts, and a small number of participating sponsor districts. Clubs and districts should recognize that recruiting Rotary Grants for University Teachers applicants will require an investment of time in matching the resources within their district and the needs of districts in low-income countries.

The Scholarships Subcommittee should encourage Rotary clubs to seek qualified candidates throughout the year.

Selecting Qualified Candidates

Applicants must have at least three years full-time teaching experience on a college or university faculty prior to the year in which the grant is to be used. Sponsor districts may consider Rotarians, their relatives, and non-Rotarians as candidates for this type of volunteer service if, in their judgment, the principle of “Service Above Self” will be fulfilled.

There are numerous standards by which a district may evaluate a candidate for a Rotary Grant for University Teacher, the most important being exceptional teaching ability and leadership skills. Also important are initiative, enthusiasm, adaptability, proficiency in the language of the host institution/country, academic excellence, sense of purpose, and the benefit of the teaching field to the proposed host country. All candidates must demonstrate potential for being outstanding “ambassadors of goodwill” for Rotary.

Deadlines

All district-endorsed applications must be received by The Rotary Foundation no later than 1 October (10 months prior to the award year). All applicants approved by the Trustees will receive confirmation of their approval by 15 December for teaching assignments beginning in the next Rotary year.

Role of the Sponsor District

It is the responsibility of the sponsoring district to ensure that the grant recipient:

- Has good knowledge of Rotary as an organization, the objectives of The Rotary Foundation, and his/her responsibilities as a goodwill ambassador;
- Attends district or multi-district orientation;
- Arranges to attend local club meetings, district functions, and other Rotary events; and
- Understands the financial aspects of the grant award, including the required submission of reports.

In addition, sponsor districts should welcome Rotary teachers who have recently returned and put them in contact with the district Alumni Subcommittee chairperson. Returning teachers should be asked to give club presentations to share their experiences with clubs in the district. Consider inviting the teacher to Rotary membership. Involve University Teacher alumni in orientation of outbound scholars and teachers. Utilize alumni as a resource for scholars going to developing countries. Involve University Teachers in service projects through collaboration between sponsor and host districts.

Grant Recipient’s Responsibilities

- All grant recipients must understand that the purpose of the award is to build international understanding and development while strengthening higher education in low-income countries.
- Grant recipients function as unofficial ambassadors of goodwill for Rotary and their home countries.
- Grant recipients must complete all predeparture documents in a timely manner and comply with the conditions of their awards as outlined in the Official Acceptance Form.
- Candidates must be responsible for all costs beyond the amount of the grant award.
- When invited, grant recipients must speak before various Rotary and non-Rotary audiences as well as be available for media interviews at home and abroad.
- Grant recipients are encouraged to identify Community Service, Matching Grant, and other service projects for both the sponsor and host district.

Resources

- Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers (012-EN)
- Rotary Foundation Ambassadorial Scholarships Leaflet (132-EN)
- Ambassadorial Scholarships Application (139-EN)
- Primed for Flight: Ambassadorial Scholar Orientation videotape (024-EN)
- Host Family Guidelines for Cultural Ambassadorial Scholars (394-EN)
- Public Relations Possibilities (259-EN)
- Ambassadorial Scholar's Handbook (133-EN)
- Ambassadorial Scholarships Program — Investing in World Peace videotape (432-EN)
- Rotary Grants for University Teachers Handbook (191-EN)
- Rotary Grants for University Teachers Leaflet/Application (193-EN)
- Rotary Centers for International Studies brochure (081-EN)
- Rotary Centers for International Studies folder and university profiles (082-EN) — available July 2000
- Rotary World Peace Scholarships Application (083-EN) — available November 2000
- Rotary World Peace Scholarships Leaflet (084-EN) — available November 2000
- Rotary Centers for International Studies Program Guide for Rotarians (085-EN) — available November 2000
- The Educational Programs of The Rotary Foundation of Rotary International: A 50-Year Journey Toward Peace, Goodwill and Understanding commemorative brochure (431-EN)

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276, or the RI service center for your area. Some resources can also be downloaded from the RI Web site at www.rotary.org.

Group Study Exchange Subcommittee

The Group Study Exchange (GSE) program is a unique cultural and vocational exchange opportunity for young business and professional men and women in their initial years of professional life. Teams spend four to six weeks abroad where they participate in vocational activities within their respective fields, become immersed in cultural experiences through the sites and histories of the host district, enjoy fellowship with host families and members of the community, and work with Rotarians at club meetings and various Rotary activities.

The Rotary Foundation Trustees believe that it is important for the District Group Study Exchange Subcommittee to have continuity of membership. The Group Study Exchange Subcommittee should be comprised of the district Group Study Exchange Chairperson and three Rotarians serving on staggered terms determined by the district. The district governor and district governor-elect serve as ex-officio members. The committee may also include non-Rotarian community leaders as advisors. The Group Study Exchange Committee is responsible for planning and implementing the visiting Group Study Exchange Team itinerary and preparing the outbound Group Study Exchange Team for their exchange (see below for a more specific list of responsibilities). A separate Group Study Exchange Selection Committee is charged with the responsibility of selecting the team leader and team members.

Specific Responsibilities

The major responsibility of the GSE Subcommittee is to ensure the success of the district's participation in the program. This is achieved by:

- Assisting the governor-elect/governor in applying for GSE awards;
- Organizing the participation of the Group Study Exchange Selection Committee for team leader and team member selections;
- Orienting GSE teams and leaders;
- Coordinating exchanges with paired districts;
- Arranging local itineraries and local Rotarian hosts for the visiting teams; and
- Ensuring the fulfillment of all program guidelines and requirements as stated in the *Group Study Exchange District Leaders' Handbook* (165-EN).

Specific Program Information

Types of GSE Awards

- Regular GSE awards — Each district in good standing may apply for a regular GSE award in each Rotary year regardless of contributions to the Foundation.
- Additional GSE awards — Districts may also apply for a second GSE through *SHARE* by the use of District Designated Fund (DDF). No district may apply for more than two GSEs in any year.

Group Study Exchanges are generally completed within one Rotary year. The paired districts exchange teams between 1 July and 30 June of the program year, unless both districts specifically request that the exchange be completed over two years. (Such a request must be indicated on the district GSE application or forwarded to the Foundation immediately after district pairings are announced.)

GSE Variations

- **Additional Team Members.** Up to two additional non-Rotarian team members may be added to the team through an allocation of *SHARE* DDF (in the amount of \$2,000 per additional team member or \$1,000 per additional team member on Neighboring Country GSEs).
- **Specialized GSE.** Team variations may include single-vocational and cultural teams as well as those which focus on a specific topic of mutual interest, such as Literacy or Drug Abuse Prevention. Districts may also combine their efforts to form joint-district teams.
- **Neighboring Country GSE.** Involves an exchange between two districts that have a common border or exist in close proximity. Districts may participate in an exchange with their neighbors at a greatly reduced *SHARE* catalog cost.
- **Exchange with Non-Rotary Countries.** Districts may use DDF to allow a team from a non-Rotary country to participate in GSE on an exception basis and with Trustee approval. The DDF cost will be the same as for a regular GSE, \$11,000.
- **Humanitarian GSE.** Districts select team members with expertise to identify humanitarian projects in the district to be visited. Upon return, they assist sponsoring clubs to develop Foundation grant proposals or World Community Service projects.

Expenses

1. **The Rotary Foundation** pays the least expensive commercial round-trip transportation between districts and up to \$1,000 for language training (self-study or at an eligible educational institution).

Additional subsidies include:

- GSE internal travel for low-income districts (up to \$600); low-income multi-country districts are eligible for an additional \$2,000 for the visiting team's air travel between countries comprising the district;
- Attendance by the visiting GSE team at the district conference in the host district (up to \$500);
- *SHARE* program enhancement — orientation (up to \$500) and additional language training (unlimited); and extra team members (up to \$2,000).

2. The **host district** provides the visiting team's meals, accommodations, and travel during the study program.
3. **Team members** pay for personal and incidental expenses, visa, passport and inoculation expenses, insurance coverage, and the cost of any additional travel after the study tour.

Number of GSEs in Which a District May Participate

Every district in good standing with the Group Study Exchange program may apply to participate in one GSE each year, regardless of specific contributions to The Rotary Foundation. Districts may also choose to allocate a portion of their District Designated Funds, (DDF) toward a second GSE award. The GSE Subcommittee should work with the district governor, district governor-elect, immediate past district governor, and District Foundation Committee chairperson to determine whether the district should allocate DDF to the Educational Programs Category of the *SHARE* system to fund a second exchange.

Funds allocated for second Group Study Exchanges are pooled to support travel of all second exchanges. In the event that surplus funds are generated from second exchanges, these will be contributed to the World Fund.

Donated GSE awards

Through the *SHARE* system, a district may also choose to donate an extra GSE award to another district. (When doing so, the donating district must plan to exchange with the recipient district, unless other arrangements are made with an alternate district.)

To donate an extra GSE award to another district:

1. Communicate with the proposed recipient district to ensure it is willing to participate *and* is in need of a donated GSE to facilitate the exchange.
2. Allocate the appropriate DDF amount to the donated GSE option within the Donation Category.
3. Indicate the recipient district on the *SHARE* Decision Worksheet.
4. If the donating district will use its regular World Fund GSE to exchange with a district other than the recipient of the donated GSE, the donating district must also allocate an extra GSE for its own use, through the Educational Programs Category.
5. Return the completed *SHARE* Decision Worksheet to the Foundation by 1 March.
6. Both districts must submit GSE applications, indicating each other as the preferred partner district, to the Foundation by 1 October.

NOTE: No district may participate in more than two GSEs per year.

District Pairings

To enhance the diversity of district pairings, districts are encouraged to accept an unrestricted pairing made by the Trustees. However, if the district chooses to prearrange a pairing, it should consider pairings that represent diverse cultures, languages, and/or regions. It is also recommended that the district make early contact to pursue a GSE with a specific area for the following year. This contact can be initiated through a letter sent to the specified districts describing the interest in an exchange. Do not expect a GSE to "happen overnight." The most successful exchanges result from detailed advance planning.

Application Process

1. Explain the proposed program to district Rotarians through the district governor's monthly letters and other means. **NOTE:** The district must receive the approval of two-thirds of its clubs when considering a GSE. This may be obtained through resolution at a district conference or assembly, or through a ballot-by-mail. The subcommittee should assist the district governor and governor-elect in this effort. Districts must apply for GSEs by 1 October.
2. After obtaining the clubs' approval, the district should **complete the District GSE Application** (167-EN), indicating up to three geographical preferences. Districts should remember to diversify their GSE partnerships taking into account geographical, cultural, and linguistic differences. (Advance contacts at the preceding International Assembly or through other means are encouraged. Districts should bear in mind that many districts pursue GSEs years in advance.) The Trustees give these choices every consideration, but reserve the right to determine which districts receive GSE awards and how districts are paired.

NOTE: Districts that have sought and found their own partner districts prearrange agreements in a process called "self-pairing." In the case of self-pairing, at the time of application, both district governors-elect should place as their first choice the district with which an agreement has been made. If all other GSE qualifications are met, most "self-paired" districts are awarded a GSE for that particular year.

3. As part of the application, the district should cite a clear purpose and goal to be achieved by the exchange, present a plan for accommodation of the incoming team, and present a well-rounded plan for orientation of the outgoing team.
4. **GSE applications must be received at World Headquarters by 1 October 2001.**
5. The granting of GSE awards and district pairings are announced soon after 1 October. If a district is granted an award, the GSE Subcommittee chairperson will receive materials on the program, including leaflets, and team leader and team member applications.
6. Governors-elect of paired districts are provided an opportunity to **meet at the International Assembly**, to make preliminary agreements about travel dates and arrival/departure cities. They may also make tentative contacts for GSEs scheduled two years later.

Responsibilities of the *Sending* District GSE Subcommittee

- Communicate early and often with the subcommittee of the paired district.
 - Determine the length and dates of the team's visit (between four and six weeks) and the place of arrival and departure, with the advice and cooperation of the host district.
 - Organize the participation of the Group Study Exchange Selection Committee for team leader and team member selections. The Selection Committee must include the district GSE chairperson as chairperson of the committee, immediate past district governor, district governor, district governor-elect, and three Rotarians on staggered terms. The committee may also include nonvoting advisors as recommended in the *GSE District Leaders' Handbook*.

- Assist the GSE Selection Committee to select a team leader.
 - Receive GSE Team Leader Applications (260-EN). The Group Study Exchange Selection Committee must interview all candidates.
 - The selected team leader may not be a district governor, district governor-elect, or immediate past district governor. A past district governor may serve as a team leader, provided that there has been an open selection process offering this leadership opportunity to district Rotarians and where special requirements of the exchange, such as language, vocation, or other needs, result in a past district governor being chosen as the best qualified candidate.
 - Following selection of the team leader, the Group Study Exchange Selection Committee, including the team leader, interviews and selects the team members.
- Assist the GSE Selection Committee to select team members.
 - Applicants must currently be employed in any recognized business or profession on a full-time basis. In addition, team members **must** be within the age range of 25 to 40 in order to fulfill the rigorous and extensive demands of international travel and active participation in multi-week activities. The intention of these requirements is to enhance the long-term impact that the exchange has on the person's career. Candidates whose professional careers will not be measurably enhanced or who may be expected not to continue in their careers for some time would be considered inappropriate selections. Essay instructions are included in the GSE Team Member Application (161-EN). The essay is intended to help in the selection process and can be used to evaluate how the GSE experience will enhance a potential team member's career.
 - Team members must agree to all conditions of the award and submit a signed copy of the Team Member Application. The team leader also must agree to all conditions of the award and submit a signed copy of the Team Leader Application.
 - **NOTE:** The district governor should provide final approval of the selected team leader and team members.
- Send biography forms on each team member to the host district a minimum of three months prior to departure.
- Submit travel request forms for the team to RITS or a designated travel agency a minimum of two months prior to departure.
- Send team member applications and medical and insurance forms to GSE staff coordinators a minimum of two months prior to departure.
- Conduct an orientation program and debriefing for outbound GSE team members, with at least 12 hours of organized programming.

Responsibilities of the *Receiving* District GSE Subcommittee

- Communicate early and often with the paired district and suggest an appropriate time period for the study tour.
- Publicize the GSE program, emphasizing vocational and leadership development aspects as well as the promotion of international understanding.
- Plan a host itinerary.
 - The itinerary must include a **minimum of five customized days of vocational study for each team member** (approximately 20 vocational days for the team), during which he/she meets individually with representatives of his/her specific business or profession, as well as **adequate rest time**. Failure to meet these criteria could lead to a district's suspension from the GSE program for a minimum of one year.

- The itinerary must also include one or two days of rest in a hotel prior to the beginning of the tour, free time of one half day in the middle of each week and one full day each weekend, and a one or two day mid-tour isolation period with no Rotarian contact. Itineraries should not include more than three Rotary club meetings per week.
- The final itinerary must be completed a **minimum of two months** before the team's arrival. Distribute copies of the final itinerary to The Rotary Foundation, the district governors of the sending and receiving districts, the GSE Subcommittee of the sending district, and each club in the receiving district.

When the GSE Team Returns Home

Sending districts should welcome GSE team members who have recently returned and put them in contact with the District Alumni Subcommittee chairperson. Returning team members should be asked to give presentations to share their experiences with clubs in the district. Every effort should be made to maintain long-term contact with alumni even if they reside outside the sponsoring district. Qualified former team members should be considered for Rotary or Rotaract membership.

Resources

- GSE District Application (167-EN)
- Group Study Exchange Brochure (160-EN)
- Group Study Exchange District Leaders' Handbook (165-EN)
- Group Study Exchange Team Handbook (164-EN)
- GSE Team Leader Application (260-EN)
- GSE Team Member Application (161-EN)
- GSE Employer Brochure (304-EN)

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. Some can also be downloaded from the RI Web site at www.rotary.org.

Grants Subcommittee

Rotary's fourth Avenue of Service encourages Rotarians to think globally, to see the world as a whole, and to use their resources to achieve international understanding, goodwill, and peace. The growth of The Rotary Foundation's humanitarian programs is a reflection of Rotarians' high awareness of human needs in virtually every corner of the world. The Foundation provides the link that connects resources and volunteers to fulfill those needs. Indeed, some of the best international work Rotary engages in is supported by the Foundation's Humanitarian Grants.

Specific Responsibilities

The Grants Subcommittee should include at least three members with provision for continuity, as many grant projects are not completed in one Rotary year. Therefore, the subcommittee should be selected by the district governor cooperatively with the district governor-elect. Both serve as ex-officio members of the subcommittee.

The major responsibilities of the Grants Subcommittee are to:

- Become familiar with each grant program, its eligibility criteria and application procedures. This will allow the subcommittee to assist clubs in developing ways to participate in International Service projects as well as inform Rotary clubs and/or district project committees planning such projects of the kinds of Foundation grants that can help them.
- Assist Rotarians in understanding the policies of the Foundation. The strength of Rotary activity is rooted at the club and district levels.
- Recognize when a project may qualify for Foundation financial support. While many International Service activities qualify for additional support from the Foundation, many do not. As Foundation funds are limited, the Trustees cannot fund every project that may be worthy in itself. Because the criteria for funding are well-defined and exceptions are rare, the Grants Subcommittee can help Rotarians whose proposals do not qualify for Foundation grants by encouraging them to redirect their efforts to pursue other means of support.

- Work with the district governor, district governor-elect, immediate past district governor, and District Foundation Committee chairperson to determine the amount of District Designated Funds (DDF) the district should allocate to the Humanitarian Programs Category through the *SHARE* system. The amount of DDF allocated should reflect the general types of Humanitarian Grants programs in which the district would like to participate during future Rotary years.
- Work with club and district officers to ensure the full utilization of all DDF allocated to the Humanitarian Programs Category, if any.
- Help clubs identify interesting speakers such as recipients of Grants for Rotary Volunteers, Matching Grant contacts, or other local organizations involved in international development.
- Encourage the timely submission of reports to the Foundation from all sponsors of approved grant projects and all returned recipients of Grants for Rotary Volunteers.
- Provide assistance to specific programs in which the district is involved and/or assist the district governor in monitoring the progress of an approved Matching Grant or 3-H Grant project, when so requested.
- Work closely with other International Service committees, such as World Community Service or Vocational Service Committee (for Rotary Volunteers).
- Keep the Foundation informed of subcommittee activities. The success stories of some District Grants Subcommittees may offer ideas that other districts can adopt.

Specific Program Information

The Rotary Foundation offers a wide variety of humanitarian grants programs, each with its own specific purpose and eligibility criteria. However, because all the grant programs are designed to assist international humanitarian efforts, all projects supported by the Foundation's Humanitarian Grants must demonstrate:

- **Internationality** — To be considered international, a project must involve **at least** two countries — the “sponsor” country and the “benefiting” or “recipient” country.
- **Active participation by Rotarians** — Foundation grant programs are designed to assist Rotarians' International Service efforts. As such, Rotarians must be committed to implementing the project. In addition, projects must provide for visible Rotary identification.
- **Financial stewardship/accountability** — Because the Foundation's grants programs are funded by voluntary charitable contributions, the Trustees must be accountable for the use of those contributions. Sponsor Rotary clubs and districts, as well as individual Rotarians who receive Foundation grants, must abide by established accounting practices and procedures to ensure the appropriate use of grant funds.

Matching Grants for International Humanitarian Projects

Matching Grants assist Rotary clubs and districts in carrying out World Community Service humanitarian projects in cooperation with Rotarians of another country as a way to further the mission of The Rotary Foundation and to help improve the quality of life of those less fortunate. Grants are designed to provide funding for relatively small, one-time-only projects, with special consideration given to those that can be sustained after completion. They provide support for projects that are not supported through other Foundation or RI programs. Grants should be considered a tool for club/district World Community Service, but not the sole vehicle for such service.

A club or district that does not have international contacts is encouraged to use Rotary's *World Community Service Projects Exchange* (754-EN) to learn about specific projects that need support. After selecting a specific project, the sponsor may be able to increase its funding by applying for a Matching Grant.

Eligibility Criteria

To be eligible for a Matching Grant, a project must meet the objectives stated above as well as satisfy all of the following criteria established by the Trustees.

1. Matching Grant projects are International Service projects. The grant project must:

- Provide for humanitarian needs to benefit the economically disadvantaged, and provide assistance that is not being met by local and/or other sources.
- Have significant Rotarian involvement.
- Have visible Rotary identification.
- Demonstrably benefit no less than six individuals directly.
- Benefit the recipient community as a whole. The project must not be designed to help any individual(s) to obtain an academic degree or professional advancement, or to attend a seminar, conference, or international exchange. Projects can involve educational training, but it must be short-term in nature and provide for basic educational needs only.
- Not involve the establishment of a permanent foundation, trust, or permanent interest-bearing account.
- Involve participation and monitoring by Rotarians of clubs/districts in at least two countries. One country will be the project (benefiting) country and one will be the international sponsoring country.
NOTE: Grant projects can involve the establishment of a revolving loan fund, but such grants are limited to a maximum of \$10,000 from The Rotary Foundation and must include training and detailed information regarding recipient payback schedules.
- Not directly benefit a Rotarian; an employee of a club, district or other Rotary entity, or of Rotary International; or a spouse, lineal descendant (child or grandchild by blood or legally adopted child), a spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any living Rotarian or Rotary employee.
- Not duplicate any existing Foundation or other Rotary-sponsored program.
- *Exclude any* liability to The Rotary Foundation or to Rotary International except for the amount of the grant.
- *Be distinct (i.e., of a different type or category of project)* from any other projects for which the same applicants have already received a Matching Grant within the past five Rotary years. (This does not prevent the replication of successful projects that benefit different communities.)

- 2. Matching Grant funds (which include club/district funds to be matched by the Foundation) cannot be used:**
- For the purchase of land or buildings or the construction of substantial buildings.*
 - For the payment of salaries or other personnel costs (other than necessary, one-time-only contracted technical expertise).
 - For travel expenses related to seminars, conferences, and international exchanges.**
 - To support the operating/administrative expenses of any organization.
- * Under the Foundation's Humanitarian Grants programs, construction of shelters for underprivileged family units will be allowed until 30 June 2000. (Please contact Foundation staff for additional information after this date.) Funding is only available through existing Foundation grant programs: Matching Grants, 3-H Grants, and Helping Grants. To receive funding for construction of such shelters through these grants, all existing guidelines of the appropriate program must be met plus additional guidelines established specifically for such construction. The Foundation will not award grants for shelters that exceed \$2,000 in cost. For further details, see "Shelters for Underprivileged Families" on page 98.
- ** Grant funds may be used for individual travel expenses provided such travel is integral to the project's success. Travel expenses must be limited to 10 percent of the project's budget.
- 3. Contributions from the participating clubs/districts must be at least equal to the amount being requested from The Rotary Foundation. In addition, at least half of the club/district contributions must come from outside the project site country.**
- 4. The Foundation will not use Matching Grant funds to reimburse clubs/districts for projects already undertaken and in progress, or completed.**
- 5. If a Matching Grant project will be conducted in cooperation with another non-Rotary organization, the following conditions must be met:**
- There must be significant Rotarian involvement.
 - The Rotary sponsor(s) must clearly demonstrate that the project is initiated, controlled, and conducted by the Rotary clubs or districts involved.
 - Both Rotary cosponsors and local Rotary clubs (where appropriate) must have knowledge of and endorse the non-Rotary organization as being reputable and responsible, and have determined that the organization is registered and acts within the laws of the project country.
 - Matching Grant funds will not be provided to an existing project nor for activities primarily sponsored by a non-Rotary organization.
 - The non-Rotary organization cooperating in such projects must agree to participate and cooperate in all financial review activities connected with the project.

NOTE: The Foundation Trustees have determined that no more than eight Matching Grants projects conducted with a single cooperating organization will be awarded each Rotary year. Applications for projects conducted with a cooperating organization will be approved on a first-come, first-served basis.

Application Process

- The *Guide to Matching Grants for International Humanitarian Projects* (144-EN) includes all instructions and a sample of a completed application, and should be read before completing the Matching Grants Application (141-EN). The application is available from the RI service center for your area and must be completed and returned to the Foundation in Evanston before the Trustees will consider a request. Matching Grant requests of \$25,000 or less are accepted and processed throughout the year while funds are available. *Please allow at least 15 weeks for your application to be processed. Be certain to allow sufficient time for your project to be approved prior to its initiation.*
- Grant requests of \$25,001 to \$50,000 are considered twice a year on a *competitive* basis, as no more than 20 percent of each year's total Matching Grants budget will be available for these larger grants.

APPLICATION DEADLINE	TRUSTEE DECISION
1 August	October/November Trustees' meeting
1 January	March/April Trustees' meeting

- Staff, working with Rotarians, review applications to ensure all criteria are met and that the applications are complete.
- Upon receipt of a completed application, the Trustees review the proposal to determine if the project meets all eligibility criteria and objectives of the Matching Grants for International Humanitarian Projects, whether to approve the application, and how much shall be granted.
- If the Trustees approve the request, the sponsors are sent a formal announcement plus an agreement form to sign and return. By signing the agreement form, the sponsors accept the grant; excuse the Foundation from any liability arising out of implementation of the project; and agree to conduct the project according to the stewardship and reporting policies established by the Trustees, and to submit a report on the project after its completion. This form and sponsor contributions (where applicable) must be received by the Foundation before any grant funds can be released.
 - The maximum amount of any one Matching Grant is \$50,000, and there is no minimum. The sponsor's contribution to an **approved** Matching Grant may be eligible for Paul Harris Fellow Recognition.
 - Sponsor contributions for Matching Grants *must not be submitted* to the Foundation until *after* the grant has been approved.

Using *SHARE* District Designated Funds

For program year 2000-01, *SHARE* District Designated Funds (DDF) allocated to the Humanitarian Programs Category may be utilized as all or part of the sponsor portion of a Matching Grant.

- Districts must indicate on the Matching Grant Application that the district will utilize DDF as all or part of the sponsor's portion. The district governor must sign the application or submit a separate letter to authorize use of the DDF.
- Matching Grant applications utilizing DDF as the sponsor portion must meet the same eligibility criteria as regular, non-*SHARE* funded applications.
- Matching Grant applications utilizing DDF as the sponsor portion must be *approved* during the year the allocation is available (2000-01).

Shelters for Underprivileged Families

The following are guidelines for Foundation-funded shelters for underprivileged family units:

- Housing must be individual shelters for extremely underprivileged family units. Shelters with common walls may be constructed as long as each unit is designed to house an individual family unit. Shelters shall be single story.
- The shelters should provide a safe place to live for a family unit in an acceptable, safe environment. (Wherever possible, the area must be free from floods, rock slides, volcanic eruption, etc.)
- There must be a committee of Rotarians, where applicable, established to screen applicants for the shelters and ensure that the recipients of the shelters:
 - Contribute, in some manner, to construction of the shelter;
 - Agree not to sell the home for at least five years; and
 - Agree to maintain the housing within their means with no further expense to Rotary.
- The form, dimensions, and type of material for the shelters should conform to local conditions and local authority regulations.
- The shelters must be built or installed on a piece of sponsored or donated land with sufficient dimensions for an easy and safe access. Recipients of a shelter shall not be required to pay for the shelter or the land on which it is constructed.
- When possible, there should be a signed agreement with the head of the family, preferably a woman, land donors or sponsors, and the local Rotarians for each home showing that all agree to the same conditions and terms of use.
- Safe water and sanitation, if not included in the shelter, must be available in a reasonable proximity.
- Wherever possible, the Rotary clubs/districts involved in shelter construction projects should encourage/provide supplemental vocational training for the recipients of the shelters as well as provide a Rotarian mentor for each family.

Resources

- Humanitarian Grants Programs booklet (130-EN)
- Matching Grants Application (141-EN)
- A Guide to Matching Grants for International Humanitarian Projects (144-EN)
- World Community Service Projects Exchange (754-EN)
- A Guide to Applying for Rotary Foundation Humanitarian Grants (125-EN)
- A Guide to Developing and Managing International Service Projects (126-EN)
- Humanitarian Programs: Building a Better World video (118C-EN)

These and all other resources listed for use by the Grants Subcommittee in this section are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. Some resources can also be downloaded from the RI Web site at www.rotary.org.

Discovery Grants

The purpose of Discovery Grants is to subsidize the advance planning activities of Rotary clubs and districts designing international service projects by contributing to the travel, food, and ancillary expenses of individuals selected by the sponsor club or district to travel from one country to another to further such planning. Discovery Grants are funded either through the Carl P. Miller Endowment or from District Designated Funds (DDF). Through Discovery Grants, Rotary clubs and districts can send emissaries to establish contacts as a basis for effective international cooperation.

Eligibility Criteria

Projects must:

- demonstrate active international Rotarian participation, meaning that at least one Rotarian must participate in the planning mission.
- have a written invitation from a Rotary club or district officer from the cosponsoring club or district promising home hospitality or an explanation of why that is not feasible.
- take place after formal announcement of grant approval. Applications for planning missions that have already taken place are **not** eligible to receive funding.
- be distinct, i.e., of a different type or category from any other planning mission for which the applicants have already received a Discovery Grant within the past five Rotary years.
- require that cosponsors complete all reporting requirements before applying for future Discovery Grants.
- take place within nine months of approval; if not, the grant will be withdrawn.
- include contact person information and an invitation letter from the cooperating organization that will act as host for planning missions to areas where the local Rotary club cannot provide significant involvement or in a non-Rotary country. In these cases, home hospitality is not required from the cooperating organization.

Projects may:

- allow the replication of successful projects that benefit different communities, but does not permit the duplication of projects.
- fund planning missions taking place in the sponsor country instead of within the project country. Those applications must:
 - include a clear explanation of why the planning would be more effective in the sponsor country rather than in the project country; and
 - show strong evidence of the host Rotary club/district's commitment to the proposed project.
- be awarded to fund separate applications for the same planning mission if two separate districts apply.

Projects must not:

- fund the planning missions of clubs or districts that have received more than one *SHARE*-funded Discovery Grant during the previous six-month period.
- be used for expenses to attend a professional meeting or conference, fund the establishment of a sister club/district relationship, or support fundraising activities of a club or district.

Funding Priorities for Carl P. Miller Discovery Grants

- Carl P. Miller-funded grants give priority to projects with the following characteristics:
 - potential for becoming an international/World Community Service project;
 - makes maximum use of funding; appropriate number of team members;
 - possibilities for active Rotary involvement and identification;
 - initial groundwork completed; local investigation capabilities exhausted;
 - investigation and/or planning is for a specific project;
 - unique program content.
- Low-funding priority will be placed on applications with the following characteristics:
 - duplicates the mission of a project for which sponsors have previously received a Discovery Grant;
 - proposes travel to another country to find an international project cosponsor; or
 - intends to plan for submission of a 3-H project application.
- An application is ineligible for a Carl P. Miller Discovery Grant if its purpose is to:
 - help establish a sister club/district relationship;
 - serve as a fundraising activity;
 - attend a meeting or conference.

Application Process

Discovery Grants Funded Through the Carl P. Miller Endowment

Discovery Grants funded from the income from the Carl P. and Ruth Miller World Community Service Endowment Fund are considered on a *competitive* basis twice a year, on the following schedule:

Applications due	1 July	1 January
Grants announced	15 August	15 February
Period during which planning mission must take place	15 August to 30 June	15 February to 31 December

Because the income from the Millers' endowment is limited, only a limited number of applications can be funded and grants are made in amounts up to \$3,000. In selecting eligible applications to fund, the Trustees will give preference to planning missions that seem likely to lead to a successful International Service project. The Trustees will also try to achieve an equitable geographical distribution of both sponsor and recipient countries as well as a broad representation of different types of service projects.

Funding priorities for the *competitive* Carl P. Miller Discovery Grants:

- Applications that indicate the proposed project, which the planning mission will investigate, can become a World Community Service or other type of International Service project.
- Applications that show the planning mission will make maximum use of the funding and have an appropriate number of team members.
- Applications that show the proposed project, which the planning mission will investigate, has possibilities for active Rotary involvement and identification (rather than projects of cooperating organizations).
- Applications that indicate initial groundwork has already taken place and the project has been investigated to the maximum extent possible without an actual visit.
- Applications that show the sponsors are investigating and/or planning the logistics for a specific project will be viewed as higher priority for approval over applications that indicate the sponsors are traveling to another country to attempt to locate an international project to cosponsor.
- Applications that indicate that the sponsors are traveling to another country to attempt to locate an international project cosponsor or whose purpose is to plan for the submission of a 3-H project application will receive lower funding priority.
- Applications for a planning mission that duplicates one for which the sponsors previously received a Discovery Grant will be considered a lower priority for approval. Those applications having program content similar to a previous grant but taking place in a new country will be viewed as higher priority for approval than those that duplicate previous grants. Highest priority will be given to Discovery Grant applications that are completely different from any for which sponsors previously received a Discovery Grant.

NOTE: Applications whose primary purpose is to help establish a sister club/district relationship with no concrete objective, to serve as a fundraising activity, or to attend a meeting or a conference do not meet the basic criteria and will not receive funding.

In addition, the following conditions apply:

- No club or district may receive more than one Discovery Grant during any six-month period. Eligibility for a second grant to the same sponsor during a later period will be contingent upon completion of all reporting requirements for the previous grant.
- Applications must be submitted on a Discovery Grants Application (198-EN). Applications must be signed by the president of the club or the governor of the district applying for the grant.
- Applications must be accompanied by a letter of invitation from a cooperating club or district in the host country. The invitation must include a specific offer of home hospitality for all (or a large part) of the visit, or an explanation if no home hospitality is feasible.
- In the case of a non-Rotary country, the application letter must be accompanied by a letter from the cooperating organization in that country, but home hospitality is not required.

Discovery Grants Funded Through *SHARE* District Designated Funds

The Trustees receive more Discovery Grants applications than can be funded from the earnings from the Carl P. and Ruth Miller World Community Service Endowment Fund. Therefore, districts may utilize *SHARE* District Designated Funds (DDF) allocated to the Humanitarian Programs Category to apply for a Discovery Grant. The ceiling for such grants is \$5,000.

- Districts must indicate on the Discovery Grants Application that the grant will be funded by utilizing its DDF. The district governor must sign the application to authorize use of the DDF.
- Discovery Grant applications funded by DDF **must meet the same eligibility criteria** as regular, non-*SHARE*-funded applications. However, Discovery Grant applications funded by DDF are *not* competitive. Provided the application meets all the eligibility criteria, the grant request will be approved.
- Discovery Grant applications funded by DDF may be submitted anytime during the appropriate program year (i.e., the application deadlines for competitive Discovery Grants do not apply). However, Discovery Grant applications funded by DDF must be *approved* during the year the allocation is available (2000-01).

When Discovery Grant Team Members Return Home

Sponsor clubs/districts should welcome Discovery Grant team members who have recently returned and put them in contact with the District Alumni Subcommittee chairperson. Returning team members should be asked to give presentations to share their experiences with clubs in the district. Every effort should be made to maintain long-term contact with alumni even if they reside outside the sponsoring district.

Resources

- Humanitarian Grants Programs booklet (130-EN)
- Discovery Grants Application (198-EN)

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. The Discovery Grants Application (198-EN) can also be downloaded from the RI Web site at www.rotary.org.

Health, Hunger and Humanity (3-H) Grants

The Health, Hunger and Humanity (3-H) Grants program supports major World Community Service projects that are too large for clubs or a district. The projects are aimed at improving health, alleviating hunger, and enhancing human and social development. Development means an improvement in the quality of life through an increased competence or capacity that leads to self-reliance.

Grants range from \$100,000 to \$500,000 (recent grants average \$175,000) and are paid out over two to three years. 3-H Grants emphasize prevention rather than cure, self-help rather than charity. Project cosponsors are required to contribute a minimum of 10 percent of the total grant award (not to exceed \$25,000).

Examples of International Projects Made Possible by 3-H Grants

- Design and implementation of an adult literacy and basic math program in Guatemala
- Promotion of integrated farming techniques to reduce malnutrition and increase jobs in Bangladesh
- Nutrition education and vocational training for women and schoolchildren in Zambia

Priorities for Funding

HEALTH: clean water supplies; primary health care and health education; drug abuse prevention, treatment, and rehabilitation

HUNGER: food production, preservation, and distribution with particular emphasis on agroforestry and aquaculture

HUMANITY: literacy and vocational training; community development, with particular emphasis on income improvement

Eligibility Criteria

Consideration by The Rotary Foundation Trustees is given to projects that meet criteria approved by the RI Board and Foundation Trustees. The project must:

- Involve Rotarians in the benefiting country and at least **one other country**;
- Be initiated, controlled, and implemented by Rotarians;
- Have a significant number of Rotarians **personally and actively involved** in hands-on implementation of the project;
- Provide significant long-term benefits of a **self-help** nature to a large number of people;
- Be **self-sustaining** after the 3-H Grant funds are expended over a two- to three-year period; and
- Have **visible Rotary identification** to make the public aware of Rotary's involvement.

A 3-H Grant project **must not**:

- Fund existing projects or activities primarily sponsored by another organization;
- Fund ordinary operating expenses of another organization;
- Be used to finance construction of buildings or purchase land;*

- Benefit Rotarians or their relatives;
 - Involve liability on the part of Rotary International or its Foundation except to provide the amount of the grant.
- * Under the Foundation's Humanitarian Grants programs, construction of shelters for underprivileged family units is allowed on a three-year pilot basis, until 30 June 2000. (Please contact Foundation staff for additional information after this date.) Foundation funding is limited to \$2,000 per family shelter and is available through existing Foundation grant programs: Matching Grants, 3-H Grants, and Helping Grants. To receive funding for construction of such shelters through these grants, all existing guidelines of the appropriate shelter must be met plus additional guidelines established specifically for such construction. For further details, see "Shelters for Underprivileged Families" on page 98.

Application Process

To simplify the 3-H application process for Rotarians and present a broader range of well-developed 3-H proposals to The Rotary Foundation Trustees each year, Foundation staff will work intensively with applicants. The Foundation requires Rotarians who wish to submit a 3-H Grant Application to first submit a preliminary description of the proposed project and its budget no later than **1 January or 1 July**.

Staff will review the draft proposal and then work with applicants as they prepare their application. After the draft proposal is submitted, a 3-H Planning Grant Application may be requested. Applications must include a clear description of the proposed project, including justification, scope, objectives, budget, the role of local Rotarians in helping to reach the objectives, and how Rotarians from other countries will assist.

Formal 3-H Grant applications must be received by the Foundation by **15 March or 15 September**. The Trustees decide which grant proposals will receive funding at the following October/November or April/May meeting. Project applications compete for approval based on meeting the stated criteria and funding priorities.

If the Trustees approve the grant request, the sponsors will be sent a formal announcement plus an agreement form to sign and return. By signing the agreement form, the sponsors accept the grant; excuse the Foundation from any liability arising out of implementation of the project; and agree to conduct the project according to stewardship and reporting policies established by the Trustees, and to submit semiannual reports and a report on the project after its completion. This form and the 10 percent of the grant amount contributed by Rotarians must be received by the Foundation before funds can be released.

The project sponsors must form a 3-H Grant Management Committee comprised of five members from each cosponsoring district. Each committee member must sign the agreement form.

3-H Planning Grants

The purpose of 3-H Planning Grants is to subsidize the advance planning activities of several Rotarian cosponsors who wish to design a large-scale 3-H project. Grants are awarded up to \$20,000.

Applications for 3-H Planning Grants are considered for funding on a competitive basis twice a year by The Rotary Foundation Trustee Chairman. Applications are due 1 May for a funding decision by 30 June and 1 November for a funding decision by 31 December. The application must be endorsed by the district governor and governor-elect for each Rotarian cosponsor involved in the project, as well as by the Trustee or Director from the region.

Using *SHARE* District Designated Funds

For program year 2000-01, a district may utilize its *SHARE* District Designated Funds (DDF) allocated to the Humanitarian Programs Category to meet the required 10 percent sponsor contribution of an approved 3-H Grant. The district governor must authorize the use of DDF for this purpose.

A district may donate a portion of its DDF to the World Fund to be used by the Trustees to increase the amount of funding available for future 3-H Grant applications.

Resources

- Humanitarian Grants Programs booklet (130-EN)
- 3-H Grant Application and 3-H Planning Grant Application
- Humanitarian Programs: Building a Better World video (118C-EN)
- A Guide to Applying for Rotary Foundation Humanitarian Grants (125-EN)
- A Guide to Developing and Managing International Service Projects (126-EN)

The Humanitarian Grants Programs booklet (130-EN) is available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. The 3-H Grant Application and 3-H Planning Grant Application are available, after submitting a draft proposal and budget, from the Humanitarian Programs Department at the Foundation at World Headquarters, fax: (847) 328-8554.

Grants for Rotary Volunteers

Grants for Rotary Volunteers subsidize the expenses of Rotarians, Foundation alumni, and Rotaractors who volunteer their services and expertise in another country.

In addition to the regular Grants for Rotary Volunteers program, the Trustees approved a three-year pilot program for Long-Term Rotary Volunteers Grants, beginning in 1998-99. Through this program, funding will be provided for a volunteer to serve for one year in another country. The volunteer must perform direct service to those in the host country while training others to carry on his/her work after completion of the service term. This program is funded strictly through *SHARE* DDF allocations to the Humanitarian Programs Category at \$20,000 per volunteer. The district is responsible for selecting and preparing the volunteer.

All volunteers are maintained on one registry under the RI Rotary Volunteers program. The Rotary Foundation does not place or locate volunteers to serve at the request of individual clubs/districts and/or project sites. Volunteers may locate service sites through the *Rotary Volunteers International Site List* (279-EN) and the *Rotary Volunteers Resource List* (288-EN). Projects and/or Rotary clubs/districts seeking volunteers should use the *Rotary Volunteers International Volunteer List* (280-EN), which includes all volunteers who are registered and available to serve. The site and volunteer lists are published twice a year. Anyone wishing to volunteer or have a project site listed should contact the RI Programs Department.

If a volunteer who is registered under the Rotary Volunteers program locates a service site and meets program requirements, he or she may apply for a Grant for Rotary Volunteers to help offset travel and general expenses.

Qualifications and Requirements for Service

- Any Rotarian, Foundation alumnus or alumna (a past Foundation award or grant recipient), or Rotaractor who is registered with the Rotary Volunteers program and has located an International Service site is eligible.
- Non-Rotarians are eligible, subject to Trustee approval, when they serve in an approved Rotary project.
- Volunteers may discover a need for their services through a nonprofit organization, a Rotary club or district in another country, or the Rotary Volunteers listings.
- The volunteer must provide direct service for a minimum of four consecutive weeks. (Funding is available for a maximum of eight weeks.)
- All volunteers, even those who will be working with a cooperating organization or in connection with a Rotary-sponsored activity such as a World Community Service project, must have a letter of invitation from the Rotary club nearest the project site which specifically outlines the volunteer activity. In the case of repeated service terms at the same site, a new letter from the host club or district is required for each term.
- Volunteers should attend Rotary club meetings near the project site, if possible.
- The volunteer must submit a written report within one month of completion of the service term.
- Volunteers should seek opportunities to address Rotary clubs and community groups in their home country after completing the service term.

Expenses

- Grants are available for eligible candidates in the amount of the lowest round-trip economy airfare and up to a \$50 per diem. Air travel is provided through the Rotary International Travel Service (RITS).
- These grants are subject to available funding and grant approval. *Registration as a Rotary Volunteer does not mean that funding is automatic.*
- Non-Rotarian volunteers approved for funding by the Trustees must total less than 20 percent of the volunteer budget.
- In order to consider a request to subsidize volunteer service, the Foundation must receive the application at least six weeks in advance of the service term.

Application Process

1. Register as an international Rotary Volunteer. (**Note:** All volunteers must re-register every two years.)
2. Locate service site through the Rotary site list or through another organization whose project is in a Rotary country.
3. Obtain an invitation letter from the Rotary club in the area of the service site.
4. Complete grant application and obtain endorsement (signature) from the current district governor.
5. Submit grant application at least six weeks prior to service.
6. If the grant request is approved, the volunteer will be sent a volunteer agreement form and health certification form. Both forms must be completed, signed, and returned to the Foundation prior to the start of the service term.

Using *SHARE* District Designated Funds

Long-Term Rotary Volunteer Grants

DDF allocated to the Humanitarian Programs Category may be used to fund a Long-Term Rotary Volunteer Grant. The required DDF amount is \$20,000.

Grant applications, available from the RI service center for your area, must be completed and submitted by 1 October (eight months prior to the start of the Rotary year in which the volunteer service will take place). The application must be signed by the district governor and governor-elect who will be in office the year in which the service term will take place.

When the Rotary Volunteer Returns Home

Sponsor clubs/districts should welcome Grants for Rotary Volunteers recipients who have recently returned and put them in contact with the District Alumni Subcommittee chairperson. Returning volunteers should be asked to share their experiences with clubs in the district. Every effort should be made to maintain long-term contact with alumni even if they reside outside the sponsoring district.

Resources

- Humanitarian Grants Programs booklet (130-EN)
- Grants for Rotary Volunteers Application for Volunteer Service
- Rotary Volunteers International Volunteer Personal Registration Form (284-EN)
- Long-Term Rotary Volunteers Grant Application

The Humanitarian Grants Programs booklet (130-EN) and Rotary Volunteers International Volunteers Personal Registration Form (284-EN) are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. The registration form can also be downloaded from the RI Web site at www.rotary.org. The Grants for Rotary Volunteers Application is available by contacting the Humanitarian Programs Department at World Headquarters, fax: (847) 866-3336.

Helping Grants

Helping Grants provide support for international humanitarian service projects in a country other than that of the sponsoring club/district. These projects are similar to Matching Grant projects. However, Helping Grants provide awards to projects in non-Rotary countries and/or where the local Rotary club cannot provide significant Rotarian involvement and oversight, due to inaccessibility or distance from the project site. Helping Grants must be initiated, sponsored and monitored by a Rotary club or district outside the country where the project will take place.

Based on a 50 percent match of club/district contributions, the maximum Helping Grant amount is \$15,000.

Eligibility Criteria

To be eligible for a Helping Grant, a project must satisfy all of the following criteria established by the Trustees.

1. **Helping Grant projects are International Service projects. The grant project must:**
 - a. Provide for humanitarian needs to benefit the economically disadvantaged, and provide assistance that is not being met by local and/or other sources.
 - b. Have significant Rotarian involvement in the sponsor country.
 - c. Have visible Rotary identification, even if the project will take place in a non-Rotary country.
 - d. Demonstrably benefit no less than six individuals directly.
 - e. Benefit the recipient community as a whole. The project must not be designed to help any individual(s) obtain an academic degree or professional advancement, or attend a seminar, conference or international exchange.
 - f. Not involve establishment of a permanent foundation, trust, or permanent interest-bearing account.

NOTE: Grant projects can involve the establishment of a revolving loan fund, but must include training and detailed information regarding recipient payback schedules.
 - g. Not directly benefit a Rotarian; an employee of a club, district or other Rotary entity, or of Rotary International; or a spouse, lineal descendant (child or grandchild by blood or legally adopted child), a spouse of a lineal descendant, or an ancestor (parent or grandparent by blood) of any living Rotarian or Rotary employee.
 - h. Not duplicate any existing Foundation or other Rotary-sponsored program.
 - i. *Exclude any* liability to The Rotary Foundation or Rotary International except for the amount of the grant.
 - j. *Be distinct (i.e., of a different type or category)* from any other projects for which the same applicants have already received a Helping Grant within the past five Rotary years. (This does not prevent the replication of successful projects that benefit different communities.)
2. **Helping Grant funds (which include club/district funds to be matched by the Foundation) cannot be used:**
 - a. For the purchase of land or buildings or construction of substantial buildings;*
 - b. For payment of salaries or other personnel costs (other than necessary, one-time-only contracted technical expertise);
 - c. For international travel expenses of any kind;**
 - d. To support the operating/administrative expenses of any organization.

* Under the Foundation's Humanitarian Grants programs, construction of shelters for underprivileged family units is allowed on a three-year pilot basis until 30 June 2000. (Please contact Foundation staff for additional information after this date.) Foundation funding is limited to \$2,000 per family shelter and is available through existing grant programs: Matching Grants, 3-H Grants, and Helping Grants. To receive funding for construction of such shelters through these grants, all existing guidelines of the appropriate shelter must be met plus additional guidelines established specifically for such construction. For further details, see "Shelters for Underprivileged Families" on page 98.

** Grant funds may be used for individual travel expenses, provided such travel is integral to the project's success. Travel expenses must be limited to 10 percent of the project's budget.

3. Contributions from the participating clubs/districts must be at least twice the amount requested from the Foundation. In addition, at least half of the club/district contributions must come from outside the project site country.
4. The Foundation will not use Helping Grant funds to reimburse clubs/districts for projects already undertaken and in progress or completed.
5. If a Helping Grant project will be conducted in cooperation with another non-Rotary organization, the following conditions must be met:
 - a. There must be significant Rotarian involvement.
 - b. The Rotary sponsor(s) must clearly demonstrate that the project is initiated, controlled, and conducted by the Rotary clubs or districts involved.
 - c. Both Rotary cosponsors and local Rotary clubs (where appropriate) must have knowledge of and endorse the non-Rotary organization as being reputable and responsible, and have determined that the organization is registered and acts within the laws of the project country.
 - d. Helping Grant funds will not be provided to an existing project nor for activities primarily sponsored by a non-Rotary organization.

NOTE: The Foundation Trustees have determined that no more than eight Helping Grants will be awarded each Rotary year for projects conducted with a single cooperating organization. Applications for projects conducted with a single cooperating organization will be approved on a first-come, first-served basis.

Application Process

- The Helping Grants Application (150-EN), available from your RI service center, must be completed and returned to the Foundation in Evanston before the Trustees will consider a request. Helping Grant requests are accepted and processed throughout the year, while funds are available. *Please allow 15 weeks for the application to be processed. Be certain to allow sufficient time for your project to be approved prior to its initiation.*
- Staff, working with Rotarians, review applications to ensure they meet all criteria and are complete.
- Upon receipt of a completed application, the Trustees review the proposal to determine if the project meets all eligibility criteria and objectives of the Helping Grants program, whether to approve the application, and how much shall be granted.
- If the Trustees approve the request, the sponsors are sent a formal announcement plus an agreement form to sign and return. By signing the agreement form, the sponsors accept the grant; excuse the Foundation from any liability arising out of implementation of the project; and agree to conduct the project according to stewardship and reporting policies established by the Trustees, and to submit a report on the project after its completion. This form and sponsor contributions (where applicable) must be received by the Foundation before any grant funds can be released.
 - The maximum amount of any one Helping Grant is \$15,000, and there is no minimum. The sponsor's contribution to an approved Helping Grant may be eligible for Paul Harris Fellow Recognition.
 - Sponsor contributions for Helping Grants *must not be submitted* to the Foundation until *after* the grant has been approved.

Using *SHARE* District Designated Funds

For program year 2000-01, *SHARE* District Designated Funds (DDF) allocated to the Humanitarian Programs Category may be utilized as all or part of the sponsor portion of a Helping Grant.

- Districts must indicate on the Helping Grants Application that the district will utilize DDF as all or part of the sponsor's portion. The district governor must sign the application to authorize use of the DDF or submit a separate letter.
- Helping Grant applications utilizing DDF as the sponsor portion must meet the same eligibility criteria as regular, non-*SHARE* funded applications.
- Helping Grant applications utilizing DDF as the sponsor portion must be *approved* during the year the allocation is available (2000-01).

Resources

- Helping Grants Application (150-EN)
- Humanitarian Grants Programs booklet (130-EN)

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. The Helping Grants Application (150-EN) can also be downloaded from the RI Web site at www.rotary.org.

New Opportunities Grants

New Opportunities Grants provide a window of opportunity for districts to receive funding from The Rotary Foundation for World Community Service and other International Service activities. The grants provide districts with the freedom to design service projects which are new and unique and do not necessarily meet all the eligibility criteria of existing Foundation programs.

New Opportunities Grants are funded only through District Designated Funds allocated to the Humanitarian Programs Category.

Examples of Projects Made Possible by New Opportunities Grants

- Provided intensive management training to 30 Polish leaders in various professions.
- Sent Chinese surgeons and nurses to Australia to improve their surgical, management and hospital system skills.
- Enabled a choir of 40 South African students to attend high schools and perform concerts in the Des Moines, Iowa, USA, area.

Eligibility Criteria

- The scope of the project must fall within the mission of The Rotary Foundation and meet Rotary ideals.
- The project must have demonstrable humanitarian benefits and meet a demonstrated need.
- The project must be international in scope (i.e., the DDF must be used for a project in a country other than the district's own). (**NOTE:** Exceptions could be made for projects within multi-country districts.)

- The DDF awarded may not be used for the purchase of land or buildings or the construction of substantial buildings (substantial defined as any structure in which people would live, work, or spend a great deal of time each day).
- The project must not directly benefit a Rotarian; an employee of a club, district, or other Rotary entity, or of Rotary International; or a spouse, lineal descendant, a spouse of a lineal descendant, or an ancestor of any living Rotarian or Rotary employee.
- The project must *not* duplicate an existing Rotary Foundation or Rotary International program.
- The project must exclude any liability of The Rotary Foundation or Rotary International except for the amount of the DDF grant.
- The project must include significant Rotarian involvement in either the sponsoring or recipient district.
- The grant may not be used to provide funding to another organization or its program/project.
- The project must be distinct (i.e., of a different type or category) from any other projects for which the same applicants have already received a grant in the past. (This does not prevent the replication of successful projects that benefit different communities/people.)
- The grant may be used to fund short-term volunteers providing specific and direct service in another country.

Important Points for Districts

- Each district may apply for up to three New Opportunities Grants per year.
- The DDF grant amount per New Opportunities Grant must be between \$1,000 and \$10,000.
- Districts may not combine New Opportunities Grants to fund one larger project.
- Project length must be no longer than one year.
- A district may have only two New Opportunities Grants approved simultaneously. Payment for a subsequent New Opportunities Grant will not be released until the final report and financial records for the previous grant have been submitted.

Application Process

- A New Opportunities Grant Application (128-EN) must be completed and returned to the Foundation in Evanston before the Trustees will consider a request.
- The application must be signed by the district governor or governor-elect who will be in office in the year the project will take place.
- The proposals will be reviewed by the Trustee Chairman to determine if the project meets all eligibility criteria and objectives of the New Opportunities Grant program, whether to approve the application, and how much shall be granted.
- If the Trustees approve the request, the sponsors are sent a formal announcement plus an agreement form, as well as payment of the grant. By signing the agreement form and/or accepting payment of the grant, the sponsors accept all terms of the grant; excuse the Foundation from any liability arising out of implementation of the project; and agree to conduct the project according to stewardship and reporting policies established by the Trustees, and to submit a report on the project after its completion.

Resources

- New Opportunities Grant Application (128-EN)
- Humanitarian Grants Programs booklet (130-EN)

These resources are available by contacting your RI service center or Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276. The application (128-EN) can also be downloaded from the RI Web site at www.rotary.org.

Rotary Peace Programs Grants

Rotary Peace Programs Grants are intended to complement and extend Rotary's past efforts and current programs aimed at improving world understanding. They build on Rotary's unique perspective as the world's oldest and most international service organization.

Rotary Peace Programs Grants utilize the worldwide membership, programs and resources of Rotary to achieve greater knowledge by Rotarians, the general public, and policymakers of the issues that enhance cooperation between nations, cultivate goodwill and peaceful understanding among people, and promote economic and human development.

The grants support conferences and other activities which promote cooperation, goodwill, and development. Conferences held under the program (sometimes called Rotary Peace Forums or Goodwill Conferences) have included experts on foreign relations, national security, politics, and economics. The gatherings have featured presentations by prominent peacemakers and panels of experts with the aim of bridging the gap between perceptions offered by the media and scholarly analysis of the issues of conflict and conflict resolution.

Application Process

Clubs or districts wishing to apply for a Rotary Peace Programs Grant must submit the completed application through the Director or Trustee from their region by **1 February or 1 August** of the year before the Rotary year in which the event would take place. Applications should include the purpose, theme, and nature of the event, together with its proposed budget, time, and place. Topics must be of broad human concern, involving international cooperation, and the program must be oriented toward positive suggestions for personal (or club or district) action, including at least 50 percent discussion. The maximum award for any one program is \$25,000. The Trustees consider applications at their March/April and October/November meetings.

Using *SHARE* District Designated Funds

A district may donate a portion of its DDF to the World Fund to be used by the Trustees to increase the amount of funding available for future Rotary Peace Program Grant applications.

Resource

- Humanitarian Grants Programs booklet (130-EN)

This resource is available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276.

Disaster Relief Grants

Disaster Relief assistance is available through RI in response to disasters such as earthquakes, hurricanes, floods, volcanic eruptions, and wildfires.

At the request of the governor of an affected district, RI issues a Notice of Disaster — a brief description of the crisis and information on how to meet resulting needs, such as financial contributions, volunteer services, or donated goods. The notices are circulated worldwide, giving Rotarians at both national and international levels an opportunity to respond.

At the RI President's discretion, a Presidential Disaster Relief Grant of up to \$10,000 from The Rotary Foundation can be made to the affected district as a gesture of sympathy and solidarity.

Using *SHARE* District Designated Funds

In response to an RI-issued Notice of Disaster, districts may choose to utilize up to \$10,000 of their *SHARE* District Designated Funds (DDF) allocated to the Humanitarian Programs Category to assist disaster relief efforts in another country.

The DDF allocation must be authorized in writing by the governor of the donating district. The authorization must state which district should receive the disaster relief assistance and should be forwarded to the *SHARE* System Coordinator at the Foundation.

PolioPlus Subcommittee

At the request of The Rotary Foundation Trustees and the RI Board of Directors, the 1995 Council on Legislation passed a resolution that reaffirmed Rotary's commitment to polio eradication and explicitly made it a "priority of the highest order" for Rotary clubs and districts. The Foundation Trustees have asked each district to appoint a PolioPlus Subcommittee under the District Rotary Foundation Committee. In addition, the Trustees and RI Board encourage *each Rotary club* to appoint a PolioPlus Committee. The Trustees hope that such a structure will encourage more participation in PolioPlus activities by a broader range of Rotarians.

Specific Responsibilities

It is recommended that at least three district Rotarians serve on this subcommittee, with one member a professional in a relevant field, if possible. Appointments should be based on multi-year, staggered terms to ensure continuity. The focus of each district subcommittee will vary because of the presence or absence of polio in the district, and the district's and nation's stage in the polio eradication process. District subcommittees should coordinate closely with the appropriate National PolioPlus Committee (and in the case of multi-country districts, the relevant Regional PolioPlus Committee).

The major responsibilities of the PolioPlus Subcommittee are:

- Encourage *all* clubs in the district to participate in at least one PolioPlus activity that supports the promotion of polio eradication in either the district or another district. It is recommended that districts in polio-free countries participate in a PolioPlus Partners project to help fellow Rotarians in polio-endemic countries.
- Assist clubs in the district, through their Club PolioPlus Committee, in promoting polio eradication, informing clubs how to promote immunization of children in their community, disseminating polio eradication information and materials, and obtaining speakers for club programs. If the district or country is polio-free, suggest ways to support activities in a polio-endemic country. If the district is in a polio-endemic country, assist the National PolioPlus Committee in conducting activities in support of making the country polio-free.
- Organize at least one polio eradication district activity during the year.
- Contact a member of the PolioPlus Speakers Bureau or PolioPlus Partners Task Force to obtain the latest information and share news about polio eradication activities.

- Work with the Foundation Committee chairperson, District Public Relations Subcommittee, and district governor to assure appropriate recognition of exemplary club and district polio eradication activities.
- Request the district governor to place PolioPlus and PolioPlus Partners on the agenda of district conferences, district assemblies, and Presidents-elect Training Seminars and assist in presentation of the subject.
- If appropriate, coordinate with National and/or Regional PolioPlus Subcommittees, and governmental and other agencies in implementing polio eradication activities, such as National Immunization Days.

In addition, the Trustees and the RI Board of Directors encourage club presidents to appoint a **Club PolioPlus Committee** similar to the District PolioPlus Subcommittee. Club committee responsibilities include organizing and conducting PolioPlus eradication activities such as the following:

- Sponsor a *local* polio immunization activity for children in the community as a club project.
- Help Rotarians in polio-endemic countries achieve their polio eradication goals by participating in a PolioPlus Partners project.
- Organize a polio surveillance network in the community. (Contact the appropriate National PolioPlus Committee chairperson for more details.)
- Join or help form an immunization coalition committee, including local private medical practitioners, if possible, to help coordinate polio immunization.
- Involve other partners in service, such as public health workers, in these activities.
- Support your country's polio eradication strategy in coordination with the National PolioPlus Committee.

The club should conduct PolioPlus information activities such as the following:

- Initiate a club program on Rotary's PolioPlus program, including its status to date, the challenge ahead, and the relevance to the community.
- Provide monthly PolioPlus updates in the club bulletin based on items appearing in *THE ROTARIAN* or regional magazines, *Rotary News Basket*, *Rotary World*, or other sources.
- Place PolioPlus on the agenda of club assemblies and weekly meetings.

Clubs are also encouraged to:

- Organize and carry out activities, meetings and publicity campaigns to educate the community about polio, the need for its eradication, and Rotary's role locally and internationally.
- Obtain participation of a major business organization in the local or national polio eradication campaign.
- Work with the Community Service Committee chairperson and the club president to ensure appropriate recognition of exemplary polio eradication club activities.
- Coordinate with club-level PolioPlus Committees, the PolioPlus Subcommittee of the District Rotary Foundation Committee (and in the case of multi-national districts, with the National PolioPlus Committee), and local governmental and other agencies in implementing polio eradication activities, such as National Immunization Days.
- Invite members of the PolioPlus Speakers Bureau to speak at club or multi-club meetings.

Application Process

PolioPlus grants are prepared in coordination with the plans of the government concerned and *all* program partners, such as the World Health Organization (WHO), the US Centers for Disease Control and Prevention (CDC), and United Nations Children's Fund (UNICEF). Frequently, Regional PolioPlus Committees assist in formulating and reviewing regionally based proposals. (In countries that have a National PolioPlus Committee, that committee will work with program partners to identify needs.) Applications are reviewed by the International PolioPlus Committee and considered by the Foundation Trustees at regularly scheduled meetings. Contact your National or Regional PolioPlus chairperson for more information.

PolioPlus Partners

To register a project with the PolioPlus Partners Desk, a National PolioPlus Committee chairperson must complete a PolioPlus Partners Project Data Form (available from The Rotary Foundation) and submit it via mail or fax to the PolioPlus Partners Desk. The application will be reviewed for adherence to the Trustee-approved Eligibility Criteria for PolioPlus Partners projects and, if the project is appropriate, it will be registered in the Open Projects List and on the PolioPlus Partners page on the RI Web site. The Open Projects List is sent monthly to all Foundation Trustees, members of the International PolioPlus Committee and PolioPlus Partners Task Force, members of the PolioPlus Speakers Bureau, and Regional Rotary Foundation Coordinators.

Prospective Partners apply to the program by submitting via mail or fax a PolioPlus Partners Remittance Form (available from the Foundation). The form allows Partners to list at least two project choices from the Open Projects List, or Rotarians may also choose to allow the PolioPlus Partners Desk to attribute their donation to a priority project. Because projects are funded on a first-come, first-served basis, Partners may not receive their first project choice. If the first choice is already funded, then the coordinator will attempt to allocate the donation to a subsequent choice.

The PolioPlus Partners Remittance Form may also be used by district governors to allocate *SHARE* funds from their current-year Humanitarian Programs Category option to a Partners project.

Contributions to the PolioPlus Partners program receive the following recognition:

- Tax contribution credit (where applicable);
- Paul Harris Fellow Recognition;
- A letter from the PolioPlus Partners Task Force chairperson indicating the specific project supported.

It should be noted that clubs' participation in the PolioPlus Partners program is among the activities eligible for the Presidential Citation.

PolioPlus Partners projects remain officially open until a contribution is received and documented by an RI service center or World Headquarters. Once a project has been funded, it is removed from the Open Projects List.

Using *SHARE* District Designated Funds in Support of PolioPlus Partners

For program year 2000-01, SHARE District Designated Funds (DDF) allocated to the Humanitarian Programs Category may be utilized for PolioPlus Partners projects. The district governor must indicate by signing the PolioPlus Partner Remittance Form that the district will utilize DDF to fund the project.

Resources

- PolioPlus Presentation Kit script and slides (328-EN)
- PolioPlus Partners: Providing Tools for Immunization and Eradication (344-EN)
- PolioPlus Brochure (323-EN)
- PolioPlus: A Gift to the Children of the World (317-EN), an 11-minute video.

These resources are available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4600; fax: (847) 866-3276.

Supplementary information that can be ordered from the PolioPlus program at World Headquarters:

- PolioPlus, Target 2000 Fact Sheet — A concise overview of the history and current status of Rotary's participation in global polio eradication efforts
- PolioPlus Annual Report on Operations — A global and regional overview of program operations, including specific information on grants and the global update
- PolioPlus Partners Open Projects List — A monthly catalog of polio eradication projects in need of support
- PolioPlus Statements of Current Facts and Figures
- PolioPlus Partners program information, including a background statement and summary Open Projects List, is also available on the RI Web site at www.rotary.org.

Alumni Subcommittee

Rotary Foundation alumni include men and women from all walks of life and all over the world. These former Foundation program participants include past Ambassadorial Scholars, Group Study Exchange team members and leaders, Rotary Volunteers, Carl P. Miller Discovery Grant awardees, Rotary Grants for University Teachers recipients, and in some cases recipients of New Opportunities Grants. There are now more than 70,000 Foundation alumni. They are professors, doctors, lawyers, high court judges, ambassadors and other high-ranking government officials, authors and heads of corporations, to name a few. Some are recipients of Nobel Prizes and Pulitzer Prizes. Their participation in Foundation programs has inspired countless accomplishments benefiting humanity.

Alumni have many important roles within the Foundation. They are enthusiastic supporters of Foundation programs who can speak at club meetings or at Foundation activities and events. Their knowledge of Rotary and expertise in other fields can go a long way in supporting the Foundation and its mission. But alumni need to be asked to participate in Rotary activities, which they are generally willing to do.

Specific Responsibilities

The success of the District Alumni Subcommittee is directly related to the dedication of its members, the quality of information they receive and disseminate, and the direct communication they have with their fellow Rotarians. The Alumni Subcommittee should be comprised of at least three members, one of whom might be a past district governor. In general, each subcommittee member should be appointed for a three-year term, and their terms should overlap. This provides for consistency in the subcommittee's planning and leadership.

The Alumni Subcommittee is:

- Responsible for developing and/or maintaining a complete, correct, and updated district list or database of present Foundation program participants and alumni. This roster should include names, addresses (including e-mail, when available), phone and fax numbers, program information, businesses or vocations, speaker topics and/or career accomplishments, and distinguished alumni. Additional information, such as sponsor and host district numbers, year of program, city and country of program study or service, and study institution (if applicable), would also be helpful. This resource is the basis for promoting alumni participation in district activities.

- Responsible for advising The Rotary Foundation of any additions or changes to this database or list. (Send updated information by regular mail, e-mail, or fax to the Alumni Relations section at World Headquarters in Evanston, Illinois, USA.)
- Encouraged to use the Foundation Alumni Resource Group (FARG), an international task force appointed by the RI President and Trustee chairman, to aid the committee in accomplishing its responsibilities. FARG can assist in developing procedures for establishing and maintaining an alumni database/list and directory, as well as help develop a district alumni association to foster alumni/district fellowship and alumni participation in district and club events.
- Encouraged to organize an alumni event, such as a special dinner or luncheon, to bring together all district alumni.
- Encouraged to work with the Scholarships Subcommittee to conduct an inbound or outbound scholar orientation seminar.
- Encouraged to help create a district alumni association, if one is not currently in place.

Suggested Procedures

The Alumni Subcommittee chairperson — independently or in conjunction with alumni association members — is urged to work with the district, the Foundation Alumni Resource Group, and the Foundation to develop alumni relations by:

- Preparing a district alumni directory or list to distribute to district committees and clubs for use in locating speakers and/or performing artists, or to provide additional resources for district and club projects and activities.
- Organizing regular reunions of district alumni.
- Selecting alumni counselors to serve on incoming and outgoing Ambassadorial Scholar or GSE orientation panels.
- Enlisting the aid of alumni to identify future program participants.
- Ensuring that returned scholars or GSE team members complete required presentations in the sponsoring districts. (Scholars, for example, must give at least five talks at Rotary functions and three talks to non-Rotary audiences during the first year after their return home.)
- Supporting selection of alumni for Rotary club membership.
- Inviting alumni to contribute to the Foundation.
- Promoting appropriate alumni involvement with Rotary clubs' Community Service and World Community Service projects.
- Reporting alumni news to local Rotary clubs' information chairpersons and bulletin editors, and area print and broadcast media to increase public awareness of Foundation programs. Send a copy to the Alumni Relations section at World Headquarters for possible inclusion in RI and Foundation publications.
- Providing the Alumni Relations section with information on professional or personal alumni accomplishments that would qualify alumni as distinguished and/or prominent in their fields.
- Encouraging alumni to register as Rotary Volunteers for International Service projects.

- Requesting alumni resource materials, such as *REConnections*, the alumni newsletter, that contains features on alumni, scheduled alumni events, and general Foundation information.
- The Foundation supplies a printout of the district's alumni at the start of the new Rotary year (1 July). The subcommittee chair may also request a computer disk containing district alumni information. Please allow at least four weeks for requests to be filled.

The subcommittee must also take responsibility for inviting alumni to attend:

- Special district or club functions, perhaps as speakers;
- The district conference; and
- Annual Foundation dinners or other functions.

Rotarians and alumni with Internet access can contact the Foundation Alumni Relations section through the Alumni page on the RI Web site at www.rotary.org. The Alumni page has links to an online address update form and contribution pledge form.

Rotarians and alumni can also e-mail the Alumni Relations section directly to request information at: millmang@rotaryintl.org; goldl@rotaryintl.org.

6

The *SHARE* System

The *SHARE* system is the mechanism through which Rotary Foundation program awards are distributed worldwide. Through *SHARE*, contributions to the Foundation are transformed into Ambassadorial Scholarships, Matching Grants for International Humanitarian Projects, Group Study Exchanges, and more.

The system is called *SHARE* because the name defines what the system does:

- Rotarians *SHARE* their resources with their fellow Rotarians around the world;
- The Trustees *SHARE* some of their decision-making responsibility with the districts; and
- Rotarians *SHARE* Rotary with the world through their Foundation.

The Foundation operates on a unique funding cycle, utilizing contributions for program activities three years after they are recorded. The three-year cycle gives districts time for program planning and participant selection, and allows the Foundation to invest the contributions to pay for all administration, program operations, and fund development costs. Thus, 100 percent of every general contribution is available to spend directly on program awards approximately three years later. About \$991 million has been spent on Foundation programs since 1947.

CONTRIBUTION YEAR	PROGRAM YEAR
1998-99	2001-02
1999-2000	2002-03
2000-01	2003-04

At the end of each contribution year, each Rotary district's contributions to the Annual Programs Fund are divided into two funds: 40 percent is credited to the World Fund (WF) and 60 percent is credited to the District Designated Fund (DDF).

The 40 percent credited to the WF is used by the Foundation to pay for the worldwide programs available to *all* Rotary districts, regardless of specific contributions.

The 60 percent credited to the DDF is used by the district, through the *SHARE* system, to fund the programs in which it chooses to participate. Through *SHARE*, each district is given an opportunity to allocate its DDF for a variety of Foundation programs, including Ambassadorial Scholarships, credit toward the sponsor portion of a Matching Grant, or an extra Group Study Exchange.

The Allocation Process

In November of each year, each district receives a *SHARE* packet initiating the new allocation cycle. This packet includes the *SHARE* Allocation Workbook and a *SHARE* System Allocation Report. The workbook guides district officers through the allocation cycle, culminating in the completion and signing of the *SHARE* Decision Worksheet (included as Appendix 4 in the workbook). The *SHARE* System Allocation Report informs the district of the total DDF available for allocation for the given program year. This adjusted DDF balance is made up of:

- 60 percent of its Annual Programs Fund contributions made the previous year;
- 60 percent of its specially designated Permanent Fund earnings;
- Unallocated DDF from the previous year's allocation cycle; and
- Any necessary adjustments, including lower-cost scholarship credits.

NOTE: 60 percent of Permanent Fund earnings are only credited to the DDF if so requested at the time the donation is made.

Who?

The decision regarding how the district will use its DDF is to be made by the district governor in consultation with the immediate past district governor, governor-elect, governor-nominee, and current Rotary Foundation Committee chairperson as well as with other Rotarians in the district. It is important to include the governor-nominee in the decision-making process as he/she will be responsible for spending the allocations during his/her year as governor.

When?

The deadline for returning completed *SHARE* Decision Worksheets to the Foundation is 1 March. Periodic reminders will be sent to districts which have not yet returned their worksheets. Updated *SHARE* System Allocation Reports will also be sent to districts whose DDF balances have changed.

NOTE: Districts choosing to donate program options or DDF to other districts must return their completed worksheets by 1 March. This gives the Foundation sufficient time to notify the recipient district of the generous donation and allows that district time to change its own allocations, if necessary, as a result of the donation.

How?

It is the responsibility of the district officers to determine which Foundation programs are of the most interest to Rotarians in the district. This may be accomplished by directly polling the clubs, inviting comment through the district newsletter, or any other means suitable to the district.

After receiving input from the clubs, the district officers determine the specific DDF amounts to be allocated to each of the broad allocation categories and complete the *SHARE* Decision Worksheet.

Under the *SHARE* system, available DDF is allocated to one or more of the four broad allocation categories:

- Humanitarian Programs
- Educational Programs
- Program Enhancement
- Donations

The *SHARE* Decision Worksheet provides space for estimates for each specific program; however, only the category allocation totals are recorded and tracked.

The DDF allocated to each broad allocation category may be used for any of the individual program options encompassed within that category.

Unlike the other program categories, all donation allocations must be made at the program option level. Districts must name a recipient district at the time of donation.

DDF must be allocated to be used. Any DDF which remains unallocated for a program year will automatically carry forward to be included in the total DDF available for allocation for the next program year. Once this DDF has been carried over to a future year, it is no longer available to be spent in the program year in which it was originally available for allocation.

Allocation Options

Allocation options are determined by The Rotary Foundation Trustees at their April meeting, two years prior to the actual program year. **District governors serving in 2001-02 will receive specific information regarding allocation options as part of the *SHARE* Allocation Workbook which will be distributed in November 2001 for program year 2003-04.** Broad categories of allocation options are outlined below.

Humanitarian Programs

Allocations to the Humanitarian Programs Category are used to support Humanitarian Grant Programs such as:

- Matching Grants — sponsor portion
- Helping Grants — sponsor portion
- Grants for Rotary Volunteers
- Long-Term Grants for Rotary Volunteers
- 3-H Grants — sponsor portion
- PolioPlus Partners
- Disaster Relief
- Discovery Grants
- New Opportunities Grants

DDF may only be used for Foundation-approved projects.

Any unused DDF remaining in the Humanitarian Programs Category at the end of a program year will automatically be rolled over to be included in the total DDF available for humanitarian projects the next program year.

The *SHARE* Identification Summary by Category report will be sent quarterly throughout the program year to update districts on the remaining DDF balance for the Humanitarian Programs Category. Please use the information in this report to track pending projects and commitments of DDF as only approved grants appear on the report.

Educational Programs

Allocations to the Educational Programs Category may be used for Educational programs including:

- Academic-Year Ambassadorial Scholarship
- Two-year Multi-Year Ambassadorial Scholarship
- Three-month Cultural Ambassadorial Scholarship
- Six-month Cultural Ambassadorial Scholarship
- Three- to five-month Rotary Grant for University Teacher
- Six- to ten-month Rotary Grant for University Teacher
- Extra Group Study Exchange
- Neighboring Country Group Study Exchange

Educational allocations are spent in the program year the scholar, university teacher, or GSE team travels.

Program Enhancement

Program Enhancements are options which “enhance” programs offered through other allocation categories, such as the GSE program. Program Enhancement allocations are made in increments of \$100.

GSE Language Training Subsidy. A district may use its DDF to offset language training costs for GSE team members. (This subsidy is in addition to the \$1,000 language training grant provided by the Foundation available to all qualifying districts upon request.)

Additional GSE Team Members. A district may use its DDF to add up to two additional non-Rotarian team members at the cost of \$2,000 each. A district may also add up to two additional non-Rotarian team members for a Neighboring Country GSE at the cost of \$1,000 each.

GSE Team Member Orientation. A district may use its DDF to offset team member orientation costs (maximum of \$500).

Donations

Through the Donation Category, districts can “share” their resources with fellow Rotarians around the world and ensure the continued growth of The Rotary Foundation. Donations through *SHARE* to other Rotary districts are an essential element of International Service and Foundation programs, and allow Rotarians to share in the internationality of Rotary. Two types of donation allocations may be made:

1. Donations whose ultimate use will be determined by the Trustees

Districts may donate DDF to the World Fund to increase the general pool of funds available for the Foundation portion of Matching Grants, 3-H Grants, Grants for Rotary Volunteers, Peace Programs, and any other programs which may be created in the future.

Donations may also be made to the Permanent Fund to increase The Rotary Foundation’s Endowment. The interest earned from the endowment is spent on Foundation programs.

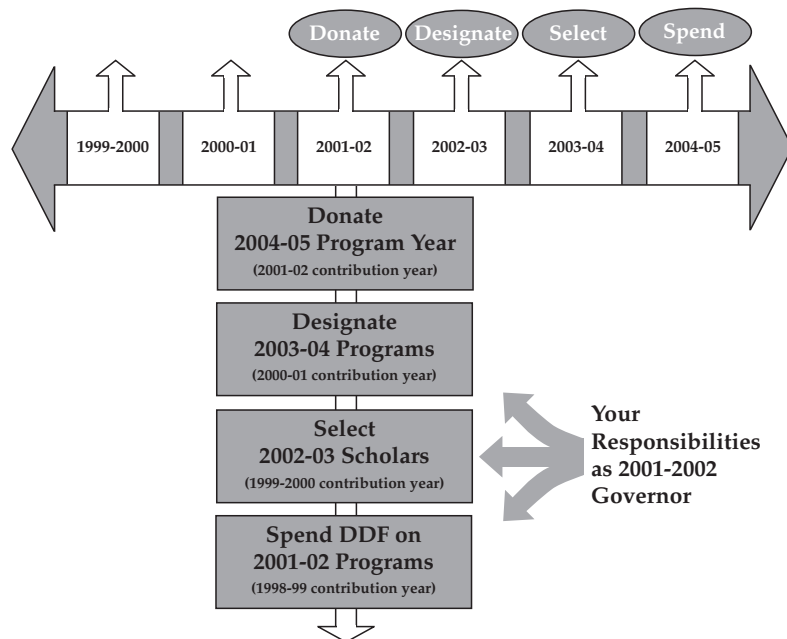
Finally, districts have the option of donating any amount of DDF to help increase scholarship opportunities in low-income areas or to support the new Rotary Centers for International Studies program. The pools of funds created by these donations will be used to fund Rotary Centers scholars or to provide scholarships to students from low-income countries. Awards for both the Rotary Centers for International Studies program and also for low-income scholarships are made on a world-competitive basis.

2. Donations to other districts

Districts may donate their DDF to benefit other districts. A district may donate DDF to be used at the discretion of the recipient district.

There are also several donation options supporting Educational Programs through which the donating district may benefit by specifying that the recipient district use the donated award in the donating district. For example, a district that donates an Academic-Year scholarship to another district may specify that the scholar study in the donating district. Of course, the donating district may allow the recipient district to use the award in any district of its choosing. Donations of scholarships, Rotary Grants for University Teachers, and extra GSEs can be made to other districts.

Below is a chart to help districts understand the *SHARE* process.



Resources

— *SHARE* brochure (181-EN)

This resource is available by contacting Publications Order Services at World Headquarters, telephone: (847) 866-4000; fax: (847) 866-3276, or by download from the RI Web site at www.rotary.org.

7

Service Awards

Service Awards for Rotarians

It is because of the combined efforts of Rotarians worldwide that The Rotary Foundation has achieved prominence and continues to excel as a leader in the movement to achieve world understanding and peace. To honor those Rotarians who help make the Foundation what it is, the Foundation Trustees have created several service awards. Rotarians who have served on a District Rotary Foundation Committee, organized Foundation events, participated in fundraising, served as Group Study Exchange team leaders or counselors to Ambassadorial Scholars, and others may be eligible to receive one of these awards.

The Rotary Foundation District Service Award

A district governor may award up to 20 certificates each year to Rotarians in the district who deserve recognition for service to the Foundation. Certificates are available free of charge from the Foundation at World Headquarters in Evanston or the RI service center for your district. The printing of the recipient's name is done by the district. After the presentation is made, the name and club of each recipient must be sent to the Foundation at World Headquarters so that accurate records can be maintained.

The Rotary Foundation Citation for Meritorious Service

The Foundation Trustees award the Citation for Meritorious Service annually to those who have rendered outstanding service to the Foundation. The handsomely gilded certificate is signed by the Trustee Chairman and mounted on a wooden base. The award is given for active service to the Foundation; a Rotarian who has only contributed financially is not considered for this award. One Rotarian per district is eligible to receive the Citation for Meritorious Service each year, and may receive the citation only once.

Nomination forms are mailed to district governors. Past district governors and current club presidents may also nominate an outstanding Rotarian, with the concurrence of the current governor. Nominations may be sent anytime to the office of the General Manager of the Foundation at World Headquarters. Current and incoming Foundation Trustees, RI Directors, and district governors are not eligible to receive this award.

The Rotary Foundation Distinguished Service Award

The Rotary Foundation Trustees award the Distinguished Service Award to those who have rendered exceptional service to the Foundation beyond the district level or for an extended period of time. The award is a cast bronze plaque mounted on a walnut base. No more than 50 Distinguished Service Awards are presented each year. Individuals nominated for the Distinguished Service Award must have received the Citation for Meritorious Service at least four years prior. The award is given only to those who have demonstrated active service; consideration is not given to those who have contributed only financially. A Rotarian may receive this award only once. Nominations must be endorsed by the nominator and at least one other Rotarian. Either the nomination or the endorsement must be from outside the nominee's district.

Nomination forms are mailed to district governors, along with the names of Rotarians in their district who hold the Citation for Meritorious Service. Nominations should be sent to the office of the General Manager of the Foundation at World Headquarters and must be received by 15 December. Current and incoming Foundation Trustees, RI Directors, and district governors are not eligible to receive this award.

Service Award for a Polio-Free World

The goal of polio eradication by the end of 2000, certified in 2005, is within our sights because of the dedication and commitment of Rotarians all over the world. To celebrate the active personal service of those who have participated in the PolioPlus program since 1 November 1992, The Rotary Foundation has a service award available for Rotarians in your district. Financial contributions, however noteworthy, are *not* a basis for the award.

Regional Service Award for a Polio-Free World

Regional awards, within areas coinciding with World Health Organization regions, are given for outstanding service in polio eradication solely or primarily within the region. A maximum of 10 awards per region are given annually.

International Service Award for a Polio-Free World

International awards for broad service to the cause of polio eradication are annually given, not to exceed 10 per year. Nomination forms and criteria are mailed to district governors and National PolioPlus Committee chairpersons.

8

The Rotary Foundation Calendar

Remember: Plan to conduct your District Rotary Foundation Seminar(s) as soon as possible during the Rotary year, but no later than 15 November 2000.

Plan to attend your area's Regional Rotary Foundation Seminar — contact your RRFC for specific date/location information.

JULY 2000

- 1 *Promote the worldwide Annual Programs Fund goal
Carl P. Miller Discovery Grant applications due
3-H Grant preliminary proposals due
Promote District Rotary Foundation Seminar (to be held by 15 November)*

AUGUST

- 1 *Matching Grant requests over \$25,000 due
Rotary Peace Programs Grant applications due*
- 15 *GSE applications sent to districts
Carl P. Miller Discovery Grant decisions announced
3-H Planning Grant proposals due
Interim Monthly Contribution Reports for 2000-01 mailed to all district governors, Annual Giving Subcommittee chairpersons, and District Rotary Foundation Committee chairpersons*
- 31 *Information on Rotary Foundation Service Awards (Citation for Meritorious Service, Distinguished Service Award, and District Rotary Foundation Awards) sent to all district governors*

SEPTEMBER

- 1 *Begin to plan activities and promotional events for Rotary Foundation Month*
- 15 2001-02 Rotary Foundation Committee Appointment forms sent to district governors-elect, as part of the *District Governor's Training Manual*
Final Monthly Contribution Reports for 2000-01 mailed to all district governors, Annual Giving Subcommittee chairpersons, and District Rotary Foundation chairpersons
Benefactor Reports sent to Permanent Fund Subcommittee chairpersons
Completed 3-H Grant applications due
October issue of *REConnections* mailed
- 30 End of 1st quarter

OCTOBER

- 1 *Contact club presidents to remind them to encourage every club to plan a Foundation program for next month*
2001-02 Ambassadorial Scholarships applications due
2001-02 Rotary Grants for University Teachers applications due
2001-02 Long-Term Rotary Volunteers Grant applications due
District GSE applications due
- 15 Top three contribution club banners (a total of six) for the 1999-2000 Rotary year sent to current district governors
District governors-elect receive Annual Programs Fund goal-setting mailing
Alumni Awards Selection Committee meets
- 21-27 Trustees' Meeting in Evanston, IL, USA

NOVEMBER

ROTARY FOUNDATION MONTH

- 1 *Strive for 100 percent club participation during Foundation Month*
3-H Planning Grant applications due
- 15 3-H Grant approvals announced
Rotary Peace Programs Grant approvals announced
District Scholarships Subcommittee chairs receive 2002-03 Ambassadorial Scholarships and Rotary Grants for University Teachers application materials and information packet
2002-03 *SHARE* mailing sent to district governors, district governors-elect, district governors-nominee, immediate past district governors, and District Rotary Foundation Committee chairs

DECEMBER

- 1 *Assist your governor-elect in setting next year's Annual Programs Fund goal*
Nominations for The Rotary Foundation Distinguished Service Award due
- 31 3-H Planning Grant decisions announced
End of calendar year — all contributions/gifts must be received by 31 December 2000 to receive 2000 tax receipts
End of 2nd quarter

JANUARY 2001

- 1 3-H Grant preliminary proposals due
Carl P. Miller Discovery Grant applications due
Matching Grant requests over \$25,000 due
- 15 2001-02 district GSE pairings confirmations mailed to districts
2001-02 Ambassadorial Scholarships award confirmations and sponsor district information packets mailed to districts
- 31 Update/brief clubs on contribution goal status

FEBRUARY

- 1 *Remind your district governor-elect to take the Goals Report Form (which asks for the district's Annual Programs Fund goal) to the International Assembly. DGEs should be prepared to set their final Annual Programs Fund goal at the International Assembly*
Rotary Peace Programs Grant applications due
- 15 Carl P. Miller Discovery Grant decisions announced
3-H Planning Grant preliminary proposals due
Benefactor Reports sent to Permanent Fund Subcommittee chairpersons
- 15-16 Trustees' Meeting in Anaheim, CA, USA
17-24 International Assembly

MARCH

- 1 Allocation deadline for donated 2001-02 *SHARE* options
Foundation Committee Appointment forms due
- 15 Completed 3-H Grant applications due
April issue of *REConnections* mailed
- 31 End of 3rd quarter

APRIL

- 15 Governors-elect requested to appoint host counselors
for 2001-02 Ambassadorial Scholars studying in their
districts
- 30-5 May Trustees' Meeting in Evanston, IL, USA

MAY

- 1 *Remind all clubs the 2000-01 contribution deadline is
30 June and to allow ample time for processing Paul Harris
Fellow Recognition*
3-H Grant decisions announced
Rotary Peace Programs Grant decisions announced
3-H Planning Grant applications due
- 15 Brief club presidents on year-end plans and progress
to date

JUNE

- 15 Alumni Certificates and information on how to
reconnect with returning scholars mailed to districts
Citation for Meritorious Service nominations due
- 24-27 RI Convention — San Antonio, TX, USA
Annual Alumni Reunion
- 28-29 Trustees' Meeting in San Antonio, TX, USA
- 30 Deadline for 2002-03 *SHARE* allocations
3-H Planning Grant approvals announced
End of fiscal year — all gifts must be received by 30 June
2001 to count toward the 2000-01 Rotary year

The 2000-01 Rotary Foundation Handbook Evaluation Form

Name _____ District _____
(Optional)

Please indicate whether you currently serve as a:

- | | |
|--|--|
| <input type="checkbox"/> District Governor
<input type="checkbox"/> District Rotary Foundation Chair
<input type="checkbox"/> Assistant Governor | <input type="checkbox"/> District Governor-elect
<input type="checkbox"/> District Rotary Foundation Subcommittee Chair
<input type="checkbox"/> Other _____
<small>(Please identify)</small> |
|--|--|

Please rate the information provided on the following topics contained in *The 2000-01 Rotary Foundation Handbook* using the scale below to best describe your experience with the handbook.

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

1. Rotary International and Its Foundation	1 2 3 4
2. Rotary Foundation Programs	1 2 3 4
3. Rotary Foundation Leadership and Resources	1 2 3 4
4. District Leadership	1 2 3 4
5. District Governors-elect	1 2 3 4
6. District Governors	1 2 3 4
7. The District Rotary Foundation Committee and the Club Rotary Foundation Committee	1 2 3 4
8. Annual Giving Subcommittee	1 2 3 4
9. Planned Giving/Major Gifts Subcommittee or Permanent Fund Subcommittee	1 2 3 4
10. Scholarships Subcommittee	1 2 3 4
11. Group Study Exchange Subcommittee	1 2 3 4
12. New GSE Variations	1 2 3 4
13. Grants Subcommittee	1 2 3 4
14. PolioPlus Subcommittee	1 2 3 4
15. Alumni Subcommittee	1 2 3 4

- | | | | | |
|------------------------------------|---|---|---|---|
| 16. The <i>SHARE</i> System | 1 | 2 | 3 | 4 |
| 17. Recognition Awards | 1 | 2 | 3 | 4 |
| 18. The Rotary Foundation Calendar | 1 | 2 | 3 | 4 |

If you rated any of the topics a 3 (“below expectations”) or 4 (“well below expectations”), please indicate what additional information related to the topics should have been provided.

Additional comments:

Thank you for your suggestions. Please return this form to:

**The Rotary Foundation of Rotary International
Planning and Administrative Division
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA**

Fax: (847) 866-1894

