

SHARE



Allocation Workbook

Program Year 2002-03

Contribution Year 1999-2000

The Rotary Foundation
of Rotary International



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CHAPTER 1

INTRODUCTION

Using This Workbook

This workbook is designed to aid Rotary districts in the *SHARE* allocation process. It includes information on how to make *SHARE* allocations, what program options are available, and how the selected allocations may be used during the appropriate program year.

It is intended that this workbook be used by district governors, district governors-elect, district governors-nominee, past district governors, district Rotary Foundation chairs and other Rotarians in the district involved in the *SHARE* decision-making process.

WHAT IS *SHARE*?

Through *SHARE*, Rotary districts share in the decision-making process by choosing in which programs they wish to participate and choosing which programs to support.

The *SHARE* system is the mechanism by which Rotary Foundation program awards are distributed worldwide. Through the *SHARE* system, Annual Program Fund contributions to The Rotary 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:

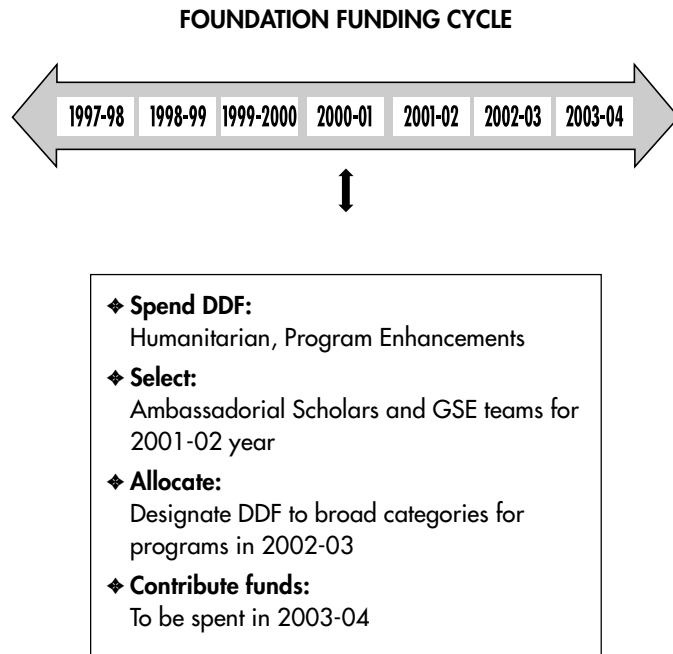
- Rotarians *SHARE* their resources with their fellow Rotarians around the world.
- The Trustees *SHARE* some of their decision-making responsibility with the districts.
- Rotarians *SHARE* Rotary with the world through their Foundation.

At the end of every 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 World Fund 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 to fund the Foundation programs in which it chooses to participate, such as Ambassadorial Scholarships, credit toward the sponsor portion of a Matching Grant, or an extra Group Study Exchange.

The *SHARE* 3-Year Cycle

Because of the Foundation's unique funding cycle, Annual Program Fund 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. The earnings from those investments pay for all administration, program operations, and fund development costs.



GLOSSARY OF *SHARE* TERMINOLOGY

<i>SHARE</i> System	The mechanism through which Annual Programs Fund contributions to the Foundation are apportioned, including the 60 percent allotted to District Designated Fund and 40 percent allotted to the World Fund
DDF	District Designated Fund — the 60 percent of a district's contributions, plus any adjustments, available for its use for programs during any given year
World Fund	The 40 percent of a district's contributions used by the Trustees for all districts regardless of contribution level

Category	DDF may be allocated to four broad categories
Program Option	The individual grant choices included within each category
Program Year	The Rotary year during which funds are spent
Allocation Year	The year for which allocations are processed
Allocation Cycle	The period from November to March during which allocations are processed for a future program year
Adjustment	A debit or credit to the DDF balance
Allocate	To distribute available DDF to, or between, categories
Allocation	The DDF amount “designated” to a category
Auto-deferral	An automatic transaction that defers unidentified DDF to the open allocation cycle — credits the amount to the available DDF balance
Carry-forward	Any DDF balance left unallocated at the end of the allocation cycle — any such amount is automatically credited to the next allocation cycle
Defer	To postpone the use of DDF — to move unidentified DDF from a category in the current program year to a future year or future category — appears as “transferred out” in the “from” year
Identification	The specific program option or program grant recipient within a category
Identify	To debit DDF from a broad category allocation and designate it to a specific program option and/or program grant recipient
Reallocate	To debit unallocated DDF from a future allocation year and credit the previous or current program year — must be moved to a category — appears as “transferred in” in the “to” year
Relinquish	To give up/release a previously identified program option and/or program grant recipient. The DDF associated with the award is returned to the district’s available DDF balance
Roll-over	Any DDF allocated to the Humanitarian category and left unused at the end of a program year is automatically applied to the Humanitarian DDF balance of the next program year.
Unallocated	The DDF amount not “designated” to a category
Unidentified	The allocated amount not designated to a specific program option and/or program grant recipient within a category

CHAPTER 2

THE ALLOCATION PROCESS

In November, each district receives notification of the amount of available DDF.

Every November, each district receives notification of the amount available in its District Designated Fund (DDF) for use towards program option allocations under the *SHARE* system. The DDF is made up of:

- 60 percent of its Annual Programs Fund contributions made the previous Rotary year;
- 60 percent of its specially designated Permanent Fund earnings (see note below);
- previously unallocated DDF, if any; and
- any necessary adjustments.

Note: Sixty percent of Permanent Fund earnings are credited to the District Designated Fund only if so requested at the time the contribution is made.

Who?

The district officers and all Rotarians in the district share responsibility for determining how the DDF will be allocated.

The decision regarding how the district will use its DDF is to be made by the district governor, the immediate past district governor, the governor-elect, the governor-nominee, and the current Rotary Foundation committee chair in consultation with other Rotarians in the district. Each district may decide for itself how to involve its Rotarians in the *SHARE* decision-making process — some districts poll their Rotarian membership, others vote on general allocation amounts at their Foundation seminar or invite comment through the district newsletter. Involvement of the Rotarians within the district is important, as it is their contributions that make up the DDF.

How?

DDF is allocated to one or more of four broad program categories.

It is the responsibility of the district officers to determine which of the Foundation's programs are of the most interest to the Rotarians within 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 — **Humanitarian, Educational, Program Enhancement, and Donation** — and complete the *SHARE* Decision Worksheet (Appendix 3).

When?

Completed allocation worksheets must be returned to the Foundation by 1 March.

The deadline for returning the completed *SHARE* Decision Worksheet to the Foundation is **1 March**.

ALLOCATION OPTIONS

Broad allocation categories provide flexibility for utilizing allocated DDF.

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

- Humanitarian
- Educational
- Program Enhancement
- Donation

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

Common Allocation Questions

Question: *If the district originally allocates its DDF to one category, can it later change the allocation to another category?*

Yes, DDF may be switched from one category to another until 1 March, the end of the allocation cycle.

Note: The exception to this rule is DDF allocated to the Donation category. Once a scholarship, extra GSE, or DDF donation to another district has been processed, it cannot be changed.

Question: *What happens to DDF allocated to a category but not used?*

Unless the district requests otherwise, unused DDF allocated to the Humanitarian category is automatically carried forward and credited to the Humanitarian category for the immediate following program year. Unused DDF allocated to the Educational, Program Enhancement, or Donation category is automatically returned to the district's DDF account for allocation during the next available allocation cycle. For example, District 1234 allocates US\$10,000 to the Humanitarian category for program year 2002-03, but only utilizes US\$8,000. The remaining US\$2,000 will automatically be credited to District 1234's Humanitarian category allocation for program year 2003-04.

Question: *What happens to DDF not allocated to a category?*

Any DDF not allocated will automatically be carried forward to the following year's allocation cycle.

HUMANITARIAN CATEGORY

Allocations to the Humanitarian category may be used for any of the following programs during the 2002-03 program year:

- Matching Grants — sponsor portion
- Helping Grants — sponsor portion
- Grants for Long-Term Rotary Volunteers
- Health, Hunger and Humanity (3-H) Grants — sponsor portion
- PolioPlus Partners
- Disaster Relief
- Discovery Grants
- New Opportunities Grants
- **NEW:** Community Assistance Grants
- **NEW:** Blane Community Immunization Grants — sponsor portion (available to US districts only)

EXAMPLE HUMANITARIAN CATEGORY

District 1234 allocates US\$10,000 to the Humanitarian category. During program year 2002-03, the district submits applications to use that allocation for the following programs:

- ◆ US\$3,000 for a Discovery Grant to send a team of Rotarians to another country to plan an international service project;
- ◆ US\$4,000 for its portion of a Matching Grant project in another country;
- ◆ US\$1,500 for a New Opportunities Grant project in a non-Rotary country;
- ◆ US\$1,000 to aid Disaster Relief efforts in another country; and
- ◆ US\$500 for a PolioPlus Partners project in another country.

To make a Humanitarian allocation:

1. determine the district's approximate DDF needs for each program,
2. total the amounts, and
3. allocate the total amount to the Humanitarian category.

Note: Step 1 is for the district's planning use only. During the program year (2002-03), the total amount allocated to the Humanitarian category may be used for any of the Humanitarian program options in any amount, up to the total amount allocated. There is an exception to this rule in the case of the New Opportunities Grants (3 grants total, maximum of US\$10,000 per grant). There is also a limit set on the amount of DDF that districts can use for Community Assistance Grants. Furthermore, Disaster Relief and Discovery Grants have dollar limits per grant.

Important Usage Information

- Applications for Humanitarian programs funded by the district's *SHARE* allocations must meet the same eligibility criteria as regular, non-*SHARE*-funded applications.
- Humanitarian grant applications using *SHARE* allocations must be approved during the year the allocation is available (2002-03).
- *SHARE*-funded Discovery Grant applications are considered on a noncompetitive basis (i.e., if the application meets the eligibility criteria, the application will be approved and the DDF will be released).
- Humanitarian allocations for PolioPlus Partners, Disaster Relief, and New Opportunities Grants must be used in another country.
- The district governor must sign all grant applications, thereby authorizing the use of allocated DDF, or, alternatively, submit a letter authorizing that a specific amount of DDF be identified for the project in question.

The deadline for submitting applications for Long-Term Rotary Volunteer Grants is 1 October 2001.

Note: Unused Humanitarian allocations from one year are automatically credited to the next program year's Humanitarian program allocation unless the district requests otherwise.

HUMANITARIAN PROGRAM OPTIONS

Matching Grants for International Humanitarian Projects — sponsor portion. Matching Grants are awarded to clubs and/or districts to help fund international service projects. Grants are awarded on a one-to-one basis, matching dollar to dollar. DDF allocated to this option is available as your district's portion of one or more Matching Grants submitted to the Trustees for approval during 2002-03.

Helping Grants — sponsor portion. Similar to a Matching Grant, a Helping Grant is designed to provide support for those very worthy international service projects that do not meet Matching Grant eligibility criteria because of the lack of significant participation of local Rotarians. Helping Grants are based on a 50 percent match of Rotary club/district contributions. DDF allocated to this option is available as your district's portion of one or more Helping Grants submitted to the Trustees for approval during 2002-03.

Discovery Grants. Discovery Grants provide clubs and districts with "seed money" to help plan international service projects. DDF allocated to this option is available to the district for one or more Discovery Grants submitted to the Trustees for approval during 2002-03. Discovery Grants funded through the DDF are noncompetitive.

New Opportunities Grants. Funded completely through the District Designated Fund, New Opportunities Grants provide districts with the freedom to design unique international service projects that do not meet all the eligibility criteria of existing Rotary Foundation programs. These grants may also be used to help fund grants for short-term volunteers (less than four weeks). Three New Opportunities Grants are allowed per district per year, up to a maximum of US\$10,000 per grant.

Grants for Long-Term Rotary Volunteers. These grants subsidize the expenses of a Rotary Volunteer from your district to serve one year in a Rotary country other than his or her own during 2002-03.

Health, Hunger and Humanity (3-H) Grants — sponsor portion. 3-H Grants are awarded for long-term sustainable projects that improve health, alleviate hunger, and enhance human and social development. DDF allocated to this option is available to your district to meet the required 10 percent sponsor contribution for 3-H Grants approved during 2002-03.

PolioPlus Partners. These projects help meet unfunded needs in the effort to eradicate polio. DDF allocated to this option is available to fund one or more approved PolioPlus Partners projects during 2002-03, which can be viewed on the Open Projects List.

Disaster Relief. Through this option, your district can choose to utilize a portion of its DDF to fund disaster relief efforts in another country, as specified by your district, during 2002-03. Districts may donate up to US\$10,000 per disaster provided each has been acknowledged by Rotary International as a disaster through the issue of an official Notice of Disaster.

NEW: Community Assistance Grants. Through these grants your district will be able use some of its DDF to fund projects in your own community (with no international project partner required). Your district can use DDF up to an amount equal to 10 percent of your district's annual giving in the previous Rotary year (2001-02), or not more than US\$10,000. The minimum grant amount is US\$1,000, unless your district has less than US\$1,000 available for Community Assistance Grants: in that case, your district will be allowed one grant totalling the amount available to be used by your district for the Community Assistance Program.

NEW: Blane Community Immunization Grants — sponsor portion. The result of a major gift by Jack Blane, past governor of District 6440, and his wife Joan, these grants provide funding to improve immunization levels of underserved people of all ages throughout the United States. DDF allocated to this option may be used as the sponsor portion of a club's grant application submitted to the Trustees for approval during 2002-03. Available to US districts only.

EDUCATIONAL CATEGORY

Allocations to the Educational category may be used for any of the following programs during 2002-03, provided sufficient DDF is allocated to the category:

- Academic-Year Ambassadorial Scholarship
US\$25,000 each
- Two-Year Multi-Year Ambassadorial Scholarship
US\$24,000 each
- Three-Month Cultural Ambassadorial Scholarship
US\$12,000 each
- Six-Month Cultural Ambassadorial Scholarship
US\$19,000 each
- Three- to five-month Rotary Grant for University Teachers
US\$12,500 each
- Six- to ten-month Rotary Grant for University Teachers
US\$22,500 each
- Extra Group Study Exchange
US\$11,000
- Neighboring Country Group Study Exchange
US\$6,000

To make an Educational allocation:

1. determine the district's approximate DDF needs for each option,
2. total the amounts, and
3. allocate the total amount to the Educational category.

Note: Step 1 is for the district's planning use only. Applications for any of the program options within the Educational category may be submitted (by the appropriate due date — see below) provided sufficient DDF is allocated to the category.

Important Usage Information

- Ambassadorial Scholarship, Rotary Grant for University Teacher, and GSE applications for 2002-03 must be submitted to the Foundation by 1 October 2001.
- Scholarships may be awarded to students within the allocating district *or* from non-Rotary countries. (Appendix 1 is a list of non-Rotary countries as of 1 July 2000.)
- A maximum of two GSE's are permitted per district regardless of the funding source.
- One-way Group Study Exchanges are *not* allowed. A GSE *SHARE* allocation is only one half of an exchange. The corresponding district must also apply to complete the exchange.
- **If you are interested in making an allocation towards the Rotary Centers for International Studies in Peace and Conflict Resolution (Rotary World Peace Scholarships) please see the section on the Donation category.**
- To donate a scholarship to another Rotary district or to the Scholarships Fund Pool for Low-Income Countries please refer to the section on the Donation category.

Note: District DDF contributions for second GSE's are pooled to support all second exchanges, not specifically the cost of the contributing district's exchange. Required allocations for extra GSE's are based on average costs of team travel. In the event that DDF contributions for extra GSE's exceed their costs, unused DDF will be contributed to the World Fund.

EDUCATIONAL PROGRAMS OPTIONS

Academic-Year Scholarship. An Ambassadorial Scholar from your district or from a non-Rotary country studies for one academic year in another Rotary country during 2002-03. Funds are provided to cover tuition, round-trip transportation, room and board, and books and supplies, not to exceed US\$25,000.

Two-Year Multi-Year Scholarship. An Ambassadorial Scholar from your district or from a non-Rotary country receives a flat grant of US\$12,000 or its equivalent per year for two years of study in another Rotary country, beginning during 2002-03.

EXAMPLE EDUCATIONAL CATEGORY

District 1234 allocates US\$57,000 to the Educational category. To utilize this allocation, the district submits applications during September and October 2001 for the following programs in which they plan to participate during program year 2002-03:

- ◆ one Academic-Year Ambassadorial Scholarship (US\$25,000),
- ◆ one six-month Cultural Ambassadorial Scholarship (US\$19,000),
- ◆ one extra Group Study Exchange (US\$11,000).

The unused DDF (US\$2,000) is returned to the district's account for allocation during the next *SHARE* cycle.

Three-Month Cultural Scholarship. An Ambassadorial Scholar from your district or from a non-Rotary country engages in intensive language training and cultural immersion for three months in another Rotary country during 2002-03.

Six-Month Cultural Scholarship. An Ambassadorial Scholar from your district or from a non-Rotary country engages in intensive language training and cultural immersion for six months in another Rotary country during 2002-03.

Group Study Exchange. Paired Rotary districts both send and receive a team of four non-Rotarians plus a Rotarian team leader for a four- to six-week study tour to learn how their vocations are practiced in another country. DDF allocated to this option provides your district with a second Group Study Exchange during 2002-03, provided your district can be paired with another district.

Neighboring Country GSE. Similar to a regular GSE, a Neighboring Country GSE is an exchange between any two districts located in countries that have a common border or exist in close proximity. In multi-country districts, a Neighboring Country GSE must be based on travel between localities that have a common country border or exist in close proximity.

Three- to five-month Rotary Grant for University Teacher. A University Teacher from your district receives a flat grant of US\$12,500 for three to five months of teaching service at a university or college in a low-income country during 2002-03.

Six- to ten-month Rotary Grant for University Teacher. A University Teacher from your district receives a flat grant of US\$22,500 for six to ten months of teaching service at a university or college in a low-income country during 2002-03.

For a description of the Rotary World Peace Scholarships for study at the Rotary Centers for International Studies in Peace and Conflict Resolution, please see the Donation category.

Additional information on each of the Humanitarian and Educational program options may be found in *The Rotary Foundation Handbook* (300-EN).

PROGRAM ENHANCEMENT CATEGORY

Program Enhancements are options that customize programs offered through other allocation categories, such as the GSE program. Currently, the following Program Enhancement options are offered (more detail is provided on each option below):

- GSE language training subsidy,
- GSE orientation subsidy (US\$500 maximum),
- GSE additional team members (US\$2,000 each, a maximum of two),
- Neighboring Country GSE additional team members (US\$1,000 each, a maximum of two).

EXAMPLE
PROGRAM ENHANCEMENT
CATEGORY

District 1234 allocates US\$500 to the Program Enhancement category. For program year 2002-03, the district's GSE pairing is with a district that speaks a language different from its own.

The district determines that the best suitable language training program for its outbound team members has a total cost of US\$1,500. The district requests that it be granted a US\$1,000 GSE Language Training Grant from the Foundation and be allowed to use its US\$500 DDF language training allocation.

If the grant request is approved, the district receives payment in the amount of US\$1,500 (US\$1,000 Foundation grant plus US\$500 DDF allocation) to be used for GSE team member language training.

Important Usage Information

- GSE Language Training Grant requests must be submitted no later than two months prior to the team's departure.
- GSE Orientation Subsidy requests must be submitted no later than two months prior to the team's departure.
- The governor of the receiving district must agree upon additional team members. Applications/notification for additional team members must be submitted to The Rotary Foundation.
- Unused Program Enhancement allocations will be returned to the district's DDF for reallocation during the next available allocation cycle.

PROGRAM ENHANCEMENT OPTIONS

GSE language training subsidy. DDF allocated to this option is available to your district to supplement the Language Training Grant offered by the Foundation.

GSE orientation subsidy. Districts may utilize *SHARE* funds to offset costs associated with planning and conducting orientation programs for outbound GSE teams.

GSE additional team member. Districts may add up to two additional non-Rotarian team members through an allocation of its DDF, contingent upon the written approval of district governors from both districts. Additional team members must meet all eligibility requirements. Program subsidies will remain the same regardless of the number of team members.

Neighboring Country GSE additional team member. Districts pursuing a Neighboring Country GSE also may add up to two additional non-Rotarian team members through *SHARE*, contingent upon the written approval of district governors from both districts. All other requirements remain the same.

DONATION CATEGORY AND DONATION OPTIONS

Through the Donation category, districts can share their resources with fellow Rotarians around the world and ensure the continued growth of The Rotary Foundation.

Allocations in the Donation category may be made in any amount to the following options:

EXAMPLE

DONATION CATEGORY

District 1234 has a strong interest in education and in working for peace. They have US\$32,000 that they can allocate towards programs with these emphases. District 1234 decides to allocate US\$25,000 to Educational Programs for an Academic-Year Scholar, and they decide to allocate US\$7,000 to the Rotary World Peace Scholarships Fund. District 1234 then seeks out and selects a candidate to receive their Academic-Year Scholarship, as well as a candidate to represent their district in the world, competitive selection for one of the 70 Rotary World Peace Scholarships.

- **NEW: Donation to the Fund for the Rotary Centers for International Studies in Peace and Conflict Resolution (Rotary World Peace Scholarships Fund)**

For the first time, districts have the option of donating any amount of DDF to support the Rotary Foundation's major educational priority, the Rotary Centers for International Studies. The pool of funds created by these donations will support the 70 Rotary World Peace Scholarships awarded on an annual basis for study at the Rotary Centers. The Rotary World Peace Scholars will study in two-year master's degree programs focused exclusively on international relations, peace studies, conflict resolution, and issues that contribute to conflict in our global community. There is no minimum donation amount required. All districts will have the opportunity annually to submit one candidate to represent their district in the worldwide selection competition for the Rotary World Peace Scholarships.

- **NEW: Donation to the Fund for Humanitarian Transportation Grants**

The Trustees have created a new pilot program that will award grants for the shipping of donated humanitarian goods such as clothing, books, and medical supplies. These grants will be funded exclusively through DDF donated to a general pool. All clubs and districts will be eligible to apply for a grant to ship donated goods to countries in need. Districts are encouraged to donate a portion of their DDF to the Humanitarian Transportation Grants pool of funds so that the initial target amount of US\$150,000 can be rapidly attained. Only once the initial target of US\$150,000 has been reached, will grants begin to be awarded.

- **Donation to the Scholarships Fund Pool for Low-Income Countries**

To help increase scholarship opportunities in low-income areas, this donation option allows districts to donate any DDF amount to this fund from which scholarships will be awarded to students from low-income countries on a world-competitive basis. Each low-income district will be invited to submit one candidate for any type of scholarship, including vocational training scholarships. All districts are encouraged to donate some amount of DDF to the fund so that a pool of US\$500,000 can be annually achieved. This will permit the funding of at least 20 scholarships to candidates from low-income countries. For more details, refer to the *Program Guide for Rotarians* (012-EN) for Program Year 2002-03. Please refer to Appendix 2 for an updated list of Rotary low-income countries.

- **Donation to the Permanent Fund**

The Permanent Fund ensures The Rotary Foundation's ability to meet the urgent needs of the future through an endowment. Permanent Fund spending of investment earnings from DDF contributions to the Permanent Fund will be used for the World Fund.

- **Donation to the World Fund** (specific project types may be indicated)

The World Fund is vital to the continuation of the Foundation's Humanitarian Programs. The Trustees use the World Fund to offer programs such as 3-H Grants, the Foundation's "matching portion" of Matching Grants, Grants for Rotary Volunteers, Disaster Relief, Rotary Peace Program Grants, Group Study Exchange awards, and pilot programs. Donations may also be used to:

- increase the funding available for new 3-H Grants
- increase the funding available for Peace Programs

- **Scholarship donation to another Rotary district** (see Appendix 4 — the Donated Ambassadorial Scholarship Questionnaire)
- **Rotary Grant for University Teacher donation to another Rotary district**
- **Extra GSE donation to another Rotary district**
- **DDF donation to another Rotary district**

Important Usage Information

- Allocations to the Rotary Centers for International Studies — Rotary World Peace Scholarships — will not be connected specifically to a scholar from the district that allocates the funds. The Rotary World Peace Scholarships are funded on a global basis and the 70 scholars will be selected on a global-competitive basis. For that reason, if the candidate endorsed by the district is not selected, the money will not revert back to the district. This funding and selection structure will ensure a balanced and truly competitive selection process for the 70 scholars worldwide, regardless of whether their districts have the means to fund them for the two-year program. Each district may submit one candidate for consideration on an annual basis. Rotary World Peace Scholarship applications for 2002-04 must be submitted to the Foundation by 1 October 2001.
- Donating Ambassadorial Scholarships, Rotary Grants for University Teachers, or an extra GSE requires extensive cooperation and communication between the donating and receiving districts.
- Allocations to the Donation category are used either by the Trustees to increase the World Fund, which benefits the Rotary world as a whole, or by single districts receiving a donation from another district.
- Although districts that allocate DDF to the World Fund may specify for which type of project the funds may be used, the district may not specify a particular part of the world, nor may the district place any other restrictions on the use of the funds.

DONATIONS TO OTHER DISTRICTS

The deadline for making donations to other districts is **1 March 2001**.

EXAMPLE
DONATIONS TO OTHER
DISTRICTS

Donations to other districts through *SHARE* can provide a way to tie several international programs together.

District 1234 is involved in a World Community Service project with District 5678 in another country. To expand their international partnership activities, District 1234 donates an Ambassadorial Scholarship to District 5678, requesting that the recipient scholar study at an institution within District 1234. District 1234 also donates an extra GSE to District 5678 to enable the two districts to participate in an exchange together. These actions strengthen the ties between the two districts.

The Donated Scholarship Questionnaire must be returned to the Foundation by **1 March 2001**.

SHARE donations to other Rotary districts are an essential element of International Service and Foundation programs and allow Rotarians to share in the internationality of Rotary.

DDF donations to other districts can be given outright or designated specifically for an Ambassadorial Scholarship, Rotary Grant for University Teacher, or an extra GSE.

Common Donation Questions

Question: *If a district allocates DDF to the Donation category, can the allocation later be changed to a different category?*

If the district donates DDF to the Permanent Fund or World Fund, yes, it may be changed to another category until 1 March, the end of the allocation cycle.

If the district donates a Scholarship, University Teacher Grant, extra GSE, or DDF to another district, the allocation cannot be changed.

Question: *Can donations be made to any Rotary district or only to low-income country districts?*

Donations may be made to any Rotary district; however, the Trustees encourage donations to low-income country districts. See Appendix 2 for a list of Rotary low-income districts.

Question: *Why must donations be made and recipients identified before 1 March?*

Donations must be identified well in advance in order to allow sufficient time for both districts to plan and organize various program options. Additionally, the 1 March deadline is conducive to making contact with other districts between November and March and at the International Assembly in February.

AMBASSADORIAL SCHOLARSHIP DONATIONS TO OTHER DISTRICTS

Everybody recognizes the importance of encouraging Rotarians worldwide to increase educational opportunities for scholars from low-income countries. One way districts can help achieve this objective is through donating scholarships (the other is through a donation in any amount to the Scholarships Fund Pool for Low-Income Countries). Scholarship donations also help develop partnerships between districts, as both the donating district and recipient district are involved in the selection process.

To donate a scholarship to another district:

1. Determine which type of scholarship will be donated and allocate the appropriate DDF amount:
 - Academic-Year Ambassadorial Scholarship (US\$25,000)
 - Two-Year Multi-Year Ambassadorial Scholarship (US\$24,000)

- Three-Month Cultural Ambassadorial Scholarship (US\$12,000)
 - Six-Month Cultural Ambassadorial Scholarship (US\$19,000)
2. Indicate the recipient district(s) on the *SHARE* Decision Worksheet.
 3. Complete the Donated Ambassadorial Scholarship Questionnaire (Appendix 4).
 4. Return the completed *SHARE* Decision Worksheet and the Donated Scholarship Questionnaire to the Foundation by 1 March 2000.
 5. Contact the recipient district to clarify any restrictions placed on the donated scholarship and provide information on universities in your district (if the scholarship is restricted for study within your district) to assist in recruiting and selecting appropriate candidates.

Common Donated Scholarship Questions

Question: *How do we identify a district to partner with on a donated scholarship?*

Many districts decide to donate a scholarship to a district with which they have previously worked on a World Community Service project, or a district with which they have recently exchanged or will exchange with through the Group Study Exchange program. Rotarians may also take advantage of networking opportunities at the International Assembly or Convention to find a district in need of a scholarship donation. Alternatively, districts may contact Scholarships staff, which keeps a list of districts and Special Extension Areas that have expressed an interest in donated scholarships.

Question: *What restrictions may be placed on donated scholarships?*

The donating district may request that the recipient be assigned to a study institution within its territory (see the Donated Scholarship Questionnaire — Appendix 4). If no such request is made, the candidate may be assigned to any study institution in a Rotary country outside the sponsor district country. If the recipient district includes more than one country, the district may also specify that the selected candidate must be from a particular country within that district.

Question: *Who makes the final decision in selecting the recipient of the donated scholarship?*

The recipient district interviews candidates and forwards at least two endorsed applications to the donating district. The donating district selects and endorses the final scholarship candidate. Early communication between the donating and recipient districts will help ensure that applications for appropriate candidates are forwarded to the donating district by the deadline.

Question: *Is the application deadline the same for a donated scholarship?*

The final deadline for submission of the endorsed application to Rotary World Headquarters is the same: 1 October. The recipient district, however, should forward at least two endorsed applications to the donating district by 1 September, to allow the donating district time to submit

the final endorsed application to The Rotary Foundation by the 1 October deadline. Additional information on selection of a donated scholarship candidate is found in the *Program Guide for Rotarians* (012-EN).

Question: *What happens to the allocated DDF if the recipient of a donated scholarship relinquishes the award?*

The allocation cost of the donated scholarship is returned to the donating district's DDF for allocation during the next available allocation cycle. The donation is not automatically deferred to the following Program Year.

ROTARY GRANTS FOR UNIVERSITY TEACHERS DONATIONS TO OTHER DISTRICTS

This option has been made available to provide **low-income districts** with a tool to address specific local teaching needs. Through the *SHARE* system, a district may donate a University Teacher Grant to another district. The district receiving this type of donation is not necessarily a low-income district; however, **the grant recipient must teach in a low-income country**. For example, a district in South Africa has identified the need to strengthen environmental education locally. The district has located a professor of environmental studies at a university in the United States. Using their DDF, the district in South Africa pays for the teacher to come to their district by donating the University Teacher Grant to the United States district in which the professor resides.

Recipients of donated Rotary Grants for University Teachers must serve in a low-income country.

This donated option may also be used by any district that desires to sponsor a University Teacher, but does not have a suitable university within its boundaries from which to recruit eligible candidates. For example, a district in Australia has worked with a district in India on World Community Service projects in the past and has identified a need for deaf/blind education in India. Since there is no pool of suitable candidates within the Indian district, the donating district may recruit an appropriate teacher from a neighboring district. Using DDF, the district then donates this grant option to the neighboring district and they work jointly to select a candidate to go to India.

To donate a University Teacher Grant to another district:

1. Determine which type of grant will be donated and allocate the appropriate DDF amount:
 - Three- to five-month University Teacher Grant (US\$12,500),
 - Six- to ten-month University Teacher Grant (US\$22,500).
2. Indicate the recipient district(s) on the *SHARE* Decision Worksheet.
3. Return the completed *SHARE* Decision Worksheet to the Foundation by 1 March 2001.
4. Assist the recipient district in locating appropriate candidates by communicating any knowledge your district may have of appropriate university or departmental contacts and names of any qualified teachers of whom you may be aware.

EXTRA GSE DONATIONS TO OTHER DISTRICTS

Donating a GSE to a low-income Rotary district is an excellent way to provide that district with a second opportunity to advance the careers of its young people. The donation also secures the GSE partnership between your two districts for the coming Rotary year. (When donating an extra GSE to another district, the donating district must plan to exchange with the recipient district.)

A donated GSE is only one-half of a full exchange. To complete the exchange the donating district must also use a regular or extra GSE.

To donate an extra Group Study Exchange award to another district:

1. Communicate with the proposed recipient district to ensure that district 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 category of allocation options.
5. Return the completed *SHARE* Decision Worksheet to the Foundation by 1 March 2001.
6. Both districts must submit GSE applications, indicating each other as the preferred partner district, to the Foundation by 1 October 2001.

DDF DONATIONS TO OTHER DISTRICTS

DDF donations to other districts are not donations of cash — the DDF must be allocated by the recipient district to a program option available through the *SHARE* system.

Donating DDF to another district is an important part of *SHARE*. Through this option, a district enables another district to allocate funds for additional program options of its choice.

To donate DDF to another district:

1. Allocate the appropriate DDF amount to the donated DDF option within the Donation category. The donation may be made in any amount.
2. Indicate the recipient district(s) on the *SHARE* Decision Worksheet.
3. Return the completed *SHARE* Decision Worksheet to the Foundation by 1 March 2001.

Note: The recipient district may allocate the donated DDF to any *SHARE* allocation category or program option within a category. The donating district **cannot** specify how donated DDF should be used by the recipient district. To use donated DDF the recipient district must allocate the donation and submit program applications independent of the donating district.

Donations to other districts — options

Academic-Year Scholarship. An Ambassadorial Scholar from a district of your choice studies for one academic year in any Rotary district during 2002-03. The scholar may study in your district if you so request.

Two-Year Multi-Year Scholarship. An Ambassadorial Scholar from a district of your choice receives a flat grant of US\$12,000 or its equivalent per year for two years of degree-oriented study in any Rotary district beginning in 2002-03. The scholar may study in your district if you so request.

Three-Month Cultural Scholarship. An Ambassadorial Scholar from a district of your choice engages in intensive language training and cultural immersion for three months in any Rotary district during 2002-03, provided an approved language school is identified. Please visit the Rotary International Web site to view a list of language schools approved for donated Cultural Ambassadorial Scholarships.

Six-Month Cultural Scholarship. An Ambassadorial Scholar from a district of your choice engages in intensive language training and cultural immersion for six months in an appropriate Rotary district during 2002-03, provided an approved language school is identified. Please visit the Rotary International Web site to view a list of language schools approved for donated Cultural Ambassadorial Scholarships.

Three- to five-month Rotary Grant for University Teacher.

A University Teacher from a district of your choice receives a flat grant of US\$12,500 for three to five months of teaching service at a university or college in a low-income country during 2002-03.

Six- to ten-month Rotary Grant for University Teacher.

A University Teacher from a district of your choice receives a flat grant of US\$22,500 for six to ten months of teaching service at a university or college in a low-income country during 2002-03.

Group Study Exchange donation. A second Group Study Exchange is donated to a Rotary district that has agreed to exchange with your district during 2002-03 and needs your donation to do so.

DDF donation. A contribution of DDF is made to a Rotary district of your choice. The receiving district may use the donated DDF for any available *SHARE* option it chooses for 2002-03.

CHAPTER 3

COMPLETING THE DECISION WORKSHEET

Ten Easy Steps

The district officers complete the *SHARE* Decision Worksheet by following 10 easy steps:

1. Enter the district number on both pages.
2. Enter the Total Available DDF amount, as reported on the *SHARE* System Allocation Report. (A copy specific to your district is included.)
3. Determine and enter the total amount desired for the Humanitarian programs.
4. Determine and enter the total amount desired for the Educational programs.
5. Determine and enter the total amount desired for any Program Enhancements.
6. Subtotal the allocation amounts and note this amount on the reverse of the worksheet.
7. Determine if the district will donate DDF to the Permanent Fund, 3-H program, Peace program or Scholarships program budgets, or to the World Fund, indicate the specific World Fund project type to which your contribution may be used, and note the total.
8. If the district will donate program options to another district, find the appropriate donation(s) and enter the recipient district(s) and contribution total.
9. Total and enter the DDF allocated in steps 6-8. This amount cannot exceed the total available DDF reported on the *SHARE* System Allocation Report.
10. All five district officers sign the completed decision worksheet and return it to The Rotary Foundation in Evanston.

The next two pages show a sample decision worksheet. It outlines the 10 steps that need to be taken to complete the decision worksheet and uses District 1234's examples from previous pages in this workbook.



SHARE

Decision Worksheet Program Year 2002-03

(Contribution year 1999-2000)

District 1234 **1**

Total Available DDF US\$ 104,170 **2**
(as reported on the *SHARE* System Allocation Report)

HUMANITARIAN — Allocations made in any amount to be available for any of the following programs:

Program Option	Per Allocation	Quantity	DDF Needed
Matching Grants — sponsor portion			US\$ 4,000
Helping Grants — sponsor portion			US\$
Discovery Grants (maximum US\$5,000 per grant)			US\$ 3,000
Health, Hunger and Humanity (3+H) Grants — sponsor portion			US\$
PolioPlus Partners			US\$ 500
Disaster Relief (maximum US\$10,000 per disaster)			US\$ 1,000
Grants for Long-Term Rotary Volunteers	US\$20,000		US\$
New Opportunities Grants (up to US\$10,000 per grant, maximum 3 grants)			US\$ 1,500
NEW: Community Assistance Grants (up to 10% of previous year's annual giving, maximum US\$10,000 for all grants)			US\$
NEW: Blane Community Immunization Grants — sponsor portion (US districts only)			US\$
HUMANITARIAN TOTAL			US\$ 10,000 3

EDUCATIONAL — Allocations to be available for any of the following programs:

Program Option	Per Allocation	Quantity	DDF Needed
Academic-Year Scholarship	US\$25,000	1	US\$ 25,000
Two-Year Multi-Year Scholarship	US\$24,000		US\$
Three-Month Cultural Scholarship	US\$12,000		US\$
Six-Month Cultural Scholarship	US\$19,000	1	US\$ 19,000
Three- to five-month Rotary Grant for University Teachers	US\$12,500		US\$
Six- to ten-month Rotary Grant for University Teachers	US\$22,500		US\$
Extra GSE	US\$11,000	1	US\$ 11,000
Neighboring Country GSE	US\$ 6,000		US\$
EDUCATIONAL TOTAL			US\$ 55,000 4

PROGRAM ENHANCEMENT — Allocations made in increments of US\$100:

Program Option	Per Allocation	Quantity	DDF Needed
GSE language training subsidy			US\$ 500
GSE orientation subsidy (maximum US\$500)			US\$
GSE additional team member	US\$ 2,000		US\$
Neighboring Country GSE additional team member	US\$ 1,000		US\$
PROGRAM ENHANCEMENT TOTAL			US\$ 500 5

SUBTOTAL **US\$ 65,500** **6**

- 1 Enter the district number on both pages.
- 2 Enter the Total Available DDF amount, as reported on the *SHARE* System Allocation Report.
- 3 Determine the estimated amount needed for each Humanitarian option. (District 1234 plans to participate in Matching Grants, Discovery Grants, PolioPlus Partners, Disaster Relief efforts, and New Opportunities Grants.) Enter the total Humanitarian amount.
- 4 Determine the estimated quantity needed for each Educational option. (District 1234 plans to sponsor an Academic-Year scholar and a Six-Month Cultural scholar, and participate in an extra GSE in 2002-03.) Enter the total Educational amount.
- 5 The district believes it will require additional funding for GSE language training, and allocates US\$500 using this option.

District 1234

①

(from reverse) Subtotal US\$ 65,500

⑥

DONATION — Allocations made in any amount:

Program Option	DDF Needed
NEW: Donation to the Fund for Rotary Centers for International Studies — Rotary World Peace Scholarships	US\$
NEW: Donation to the Fund for Humanitarian Transportation Grants	US\$
Donation to Scholarships Fund Pool for Low-Income Countries	US\$ 2,670
Donation to the Permanent Fund	US\$
Donation to the World Fund Indicate specific project type(s) (optional): <input type="checkbox"/> general <input type="checkbox"/> water <input type="checkbox"/> literacy <input type="checkbox"/> health care <input type="checkbox"/> food production <input type="checkbox"/> environment	US\$
Donation to increase 3-H program budget	US\$
Donation to increase Peace Programs budget	US\$
DONATION TOTAL	US\$ 2,670

⑦

DONATIONS TO OTHER DISTRICTS — Recipient districts must be identified at the time of allocation. Districts donating scholarships should complete and return the questionnaire in Appendix 4. Allocations made in specific amounts as indicated:

Program Option	Recipient District(s)	Per Allocation	Quantity	DDF Needed
Academic-Year Scholarship	5678	US\$25,000	1	US\$ 25,000
Two-Year Multi-Year Scholarship		US\$24,000		US\$
Three-Month Cultural Scholarship		US\$12,000		US\$
Six-Month Cultural Scholarship		US\$19,000		US\$
Three- to five-month Rotary Grant for University Teachers		US\$12,500		US\$
Six- to ten-month Rotary Grant for University Teachers		US\$22,500		US\$
Extra GSE Donation	5678	US\$11,000	1	US\$ 11,000
Neighboring Country GSE		US\$ 6,000		US\$
DDF Donation		any amount		US\$
DONATIONS TO OTHER DISTRICTS TOTAL				US\$ 36,000

⑧

Worksheet Due Date: 1 March 2001

TOTAL ALLOCATED US\$ **104,170**

⑨

(TO BE CARRIED FORWARD FOR ALLOCATION IN 2002-03) TOTAL UNALLOCATED US\$

⑩

Current Governor	Date	Immediate Past Governor	Date
Governor-elect	Date	Governor-nominee	Date
Foundation Committee Chair	Date		

Return by fax or mail to: **The Rotary Foundation — PL100**
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Telephone: (847) 866-3362
Fax: (847) 866-1894

- ⑥ Subtotal the amount allocated thus far.
- ⑦ These donation options benefit Rotary districts around the world. Enter the total Donation amount.
- ⑧ Donated scholarship type(s), recipient district(s), and the DDF amount donated must be specified. A Donated Scholarship Questionnaire must be completed for each donation. Total the donation amount and enter it here.
- ⑨ Total the amounts allocated in steps 6-8 and enter it here — it cannot exceed the amount indicated in step 2.
- ⑩ All five district officers must sign the completed worksheet. The worksheet must be returned by **1 March 2001**.



SHARE System Allocation Report
 District: 5678 Program Year: 2002-03

1

2

SHARE Account Transactions (US\$)				
Date	Transaction	Description	Amount	Balance
11/01/00	60% of Contributions	From 1999-2000	\$11,500.00	\$11,500.00
11/01/00	Carry-forward	From 2001-02	\$ 500.00	\$12,000.00
11/05/00	Relinquishment	AY Scholarship 2000-01	\$10,000.00	\$22,000.00

3

Adjusted DDF Balance: \$ 22,000.00
 Less Current Allocations: \$ 000.00
 Unallocated DDF Balance: \$ 22,000.00

4

Allocation Category Balances (US\$)				
Category	Allocation	Transferred in	Identified	Transferred Out
Humanitarian	\$0.00	\$0.00	\$0.00	\$0.00
Educational	\$0.00	\$0.00	\$0.00	\$0.00
Program Enhancement	\$0.00	\$0.00	\$0.00	\$0.00
Donation	\$0.00	\$0.00	\$0.00	\$0.00

5

Program Options not requiring SHARE Funds (Significant Restrictions Apply)			
Program Option	Description	Amount	Donating District
Academic Yr. Scholar	Donation	\$25,000.00	1234

Printed MM-DD-YYYY Time

6

(Ignore Page Number)

- 1 The heading indicates the name of the report, district number, and program year when funds are available.
- 2 This section details the Adjusted DDF Balance, the total amount of DDF available for allocation for 2002-03, which includes: 60 percent of your district's 1999-2000 Annual Programs Fund giving, any unallocated funds carried forward from the last allocation cycle (Program Year 2001-02), and any adjustments such as deferred or relinquished scholarships.
- 3 These figures summarize the total Adjusted DDF Balance, less total Allocations already made, and the remaining, Unallocated DDF Balance.
- 4 This section details the allocation amount, the identified amount, and the DDF transferred in and out for each broad Allocation Category.
- 5 This section, not applicable to all districts, details any program options not requiring DDF, such as named or endowed program options or any donated program options received from another district.
- 6 The footer indicates the date the report was printed. Please ignore the page number.

APPENDIX 1

LIST OF NON-ROTARY COUNTRIES

(as of 1 July 2000)

Afghanistan	Nauru
Bhutan	Korea, Democratic Republic of
China, People's Republic of	Oman
Cuba	Qatar
Equatorial Guinea	Saudi Arabia
Iran, Islamic Republic of	Somalia
Iraq	Syria
Kiribati	Tajikistan
Kuwait	Turkmenistan
Laos	Tuvalu
Liberia	United Arab Emirates
Libya	Uzbekistan
Maldives	Vietnam
Marshall Islands	Yemen
Myanmar (Burma)	

APPENDIX 2

LIST OF ROTARY LOW-INCOME⁺ COUNTRIES AND GEOGRAPHICAL AREAS

LATIN AMERICA AND THE CARIBBEAN

Barbados*	7030	Haiti	7020
Belize	4250	Honduras	4250
Bolivia	4690	Jamaica	7020
Brazil	4310, 4390, 4410-4440, 4470-4680, 4700-4780	Mexico	4100-4200
Chile	4320-4360	Nicaragua	4240
Colombia	4270-4290	Panama	4240
Costa Rica	4240	Paraguay	4470, 4840
Dominica	7030	Peru	4300, 4450, 4460
Dominican Republic	4060	St. Kitts & Nevis	7030
Ecuador	4400	St. Lucia	7030
El Salvador	4240	St. Vincent/Grenadines	7030
Grenada	7030	Suriname	7030
Guadeloupe*	7030	Trinidad & Tobago	7030
Guatemala	4250	Uruguay	4960-4980
Guyana	7030	Venezuela	4370, 4380

EUROPE AND CENTRAL ASIA

Albania	2090	Latvia	2410
Armenia	non-districted	Lithuania	1460
Azerbaijan	non-districted	Macedonia, FYR	2480
Belarus	2230	Moldova	2241
Bosnia/Herzegovina	1910	Poland	2230
Bulgaria	2480	Romania	2241
Croatia	1910	Russia-Central West	2350
Czech Republic	2240	Russia-East of Urals	5010
Estonia	1420	Russia-Northwest	1430
Georgia, Rep. of	non-districted	Russia-Southwest	2370
Gibraltar*	non-districted	Slovakia	1920
Hungary	1910	Turkey	2420-2440
Isle of Man*	1280	Ukraine	2230
Kazakhstan	2430	Yugoslavia	
Kyrgyzstan	2430	(Serbia & Montenegro)	2480

MIDDLE EAST AND NORTH AFRICA

Algeria	9010	Lebanon	2450
Egypt	2450	Morocco	9010
Jordan	2450	Tunisia	9010

SUB-SAHARAN AFRICA

Angola	non-districted	Madagascar	9220
Benin	9100	Malawi	9210
Botswana	9250	Mali	9100
Burkina Faso	9100	Mauritania	9010
Burundi	9150	Mauritius	9220
Cameroon	9150	Mayotte*	9220
Cape Verde	9100	Mozambique	9210, 9250
Central African Republic	9150	Namibia	9350
Chad	9150	Niger	9100
Comoros	9210	Nigeria	9110-9140
Congo Republic	9150	Rwanda	9150
Congo, Democratic Republic (Zaire)	9150	São Tomé & Príncipe	9150
Côte d'Ivoire	9100	Senegal	9100
Djibouti	9220	Sierra Leone	9100
Eritrea	9200	South Africa	9250, 9270, 9300, 9320, 9350
Ethiopia	9200	Sudan	2450
Gabon	9150	Swaziland	9250
Gambia	9100	Tanzania	9200
Ghana	9100	Togo	9100
Guinea	9100	Uganda	9200
Guinea-Bissau	9100	Zambia	9210
Kenya	9200	Zimbabwe	9210
Lesotho	9320		

SOUTH ASIA

Bangladesh	3280	Nepal	3290
India	2980, 3000-3210, 3230-3260, 3290	Pakistan	3270
		Sri Lanka	3220

EAST ASIA AND THE PACIFIC

American Samoa*	9920	Papua New Guinea	9600
Cambodia	non-districted	Philippines	3770-3870
Fiji	9920	Samoa	9920
Indonesia	3400	Solomon Islands	9600
Malaysia	3300, 3310	Thailand	3330-3360
Micronesia, Federal States	2750	Tonga	9920
Mongolia	non-districted	Vanuatu	9910
Palau*	2750		

+ Low-income is defined as the median value of the World Bank's Upper-Middle Income GNP per capita (US\$6,195.50)

* GNP per capita is estimated between US\$3,031 - US\$9,360 per 2000 World Bank Atlas

APPENDIX 3

THE *SHARE* DECISION WORKSHEET PROGRAM YEAR 2002-03

(Contribution year 1999-2000)



SHARE

Decision Worksheet Program Year 2002-03

(Contribution year 1999-2000)

District _____

Total Available DDF US\$ _____
(as reported on the *SHARE* System Allocation Report)

HUMANITARIAN — Allocations made in any amount to be available for any of the following programs:

Program Option	Per Allocation	Quantity	DDF Needed
Matching Grants — sponsor portion			US\$
Helping Grants — sponsor portion			US\$
Discovery Grants (maximum US\$5,000 per grant)			US\$
Health, Hunger and Humanity (3-H) Grants — sponsor portion			US\$
PolioPlus Partners			US\$
Disaster Relief (maximum US\$10,000 per disaster)			US\$
Grants for Long-Term Rotary Volunteers	US\$20,000		US\$
New Opportunities Grants (up to US\$10,000 per grant, maximum 3 grants)			US\$
NEW: Community Assistance Grants (up to 10% of previous year's annual giving, maximum US\$10,000 for all grants)			US\$
NEW: Blane Community Immunization Grants — sponsor portion (US districts only)			US\$
HUMANITARIAN TOTAL			US\$

EDUCATIONAL — Allocations to be available for any of the following programs:

Program Option	Per Allocation	Quantity	DDF Needed
Academic-Year Scholarship	US\$25,000		US\$
Two-Year Multi-Year Scholarship	US\$24,000		US\$
Three-Month Cultural Scholarship	US\$12,000		US\$
Six-Month Cultural Scholarship	US\$19,000		US\$
Three- to five-month Rotary Grant for University Teachers	US\$12,500		US\$
Six- to ten-month Rotary Grant for University Teachers	US\$22,500		US\$
Extra GSE	US\$11,000		US\$
Neighboring Country GSE	US\$ 6,000		US\$
EDUCATIONAL TOTAL			US\$

PROGRAM ENHANCEMENT — Allocations made in increments of US\$100:

Program Option	Per Allocation	Quantity	DDF Needed
GSE language training subsidy			US\$
GSE orientation subsidy (maximum US\$500)			US\$
GSE additional team member	US\$ 2,000		US\$
Neighboring Country GSE additional team member	US\$ 1,000		US\$
PROGRAM ENHANCEMENT TOTAL			US\$

SUBTOTAL US\$ _____

District _____

(from reverse) Subtotal US\$ _____

DONATION — Allocations made in any amount:

Program Option	DDF Needed
NEW: Donation to the Fund for Rotary Centers for International Studies — Rotary World Peace Scholarships	US\$
NEW: Donation to the Fund for Humanitarian Transportation Grants	US\$
Donation to Scholarships Fund Pool for Low-Income Countries	US\$
Donation to the Permanent Fund	US\$
Donation to the World Fund Indicate specific project type(s) (optional): <input type="checkbox"/> general <input type="checkbox"/> water <input type="checkbox"/> literacy <input type="checkbox"/> health care <input type="checkbox"/> food production <input type="checkbox"/> environment	US\$
Donation to increase 3-H program budget	US\$
Donation to increase Peace Programs budget	US\$
DONATION TOTAL	US\$

DONATIONS TO OTHER DISTRICTS — Recipient districts must be identified at the time of allocation. Districts donating scholarships should complete and return the questionnaire in Appendix 4. Allocations made in specific amounts as indicated:

Program Option	Recipient District(s)	Per Allocation	Quantity	DDF Needed
Academic-Year Scholarship		US\$25,000		US\$
Two-Year Multi-Year Scholarship		US\$24,000		US\$
Three-Month Cultural Scholarship		US\$12,000		US\$
Six-Month Cultural Scholarship		US\$19,000		US\$
Three- to five-month Rotary Grant for University Teachers		US\$12,500		US\$
Six- to ten-month Rotary Grant for University Teachers		US\$22,500		US\$
Extra GSE Donation		US\$11,000		US\$
Neighboring Country GSE		US\$ 6,000		US\$
DDF Donation		any amount		US\$
DONATIONS TO OTHER DISTRICTS TOTAL				US\$

Worksheet Due Date: 1 March 2001

TOTAL ALLOCATED US\$ _____

(TO BE CARRIED FORWARD FOR ALLOCATION IN 2002-03) TOTAL UNALLOCATED US\$ _____

Current Governor Date

Immediate Past Governor Date

Governor-elect Date

Governor-nominee Date

Foundation Committee Chair Date

Return by fax or mail to: **The Rotary Foundation — PL100**
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Telephone: (847) 866-3362
Fax: (847) 866-1894

APPENDIX 4

2002-03 DONATED
AMBASSADORIAL SCHOLARSHIP
QUESTIONNAIRE

2002-03 DONATED AMBASSADORIAL SCHOLARSHIP QUESTIONNAIRE

This questionnaire must be completed if your district is donating an Ambassadorial Scholarship to another Rotary district. (If your district is donating more than one award, please photocopy this questionnaire and return one copy for each donation.) It includes important information that will help the recipient district select the best candidate.

If donating a Scholarship, return this form with the completed *SHARE* Decision Worksheet by **1 March 2001**.

If received by 1 March 2001, The Rotary Foundation will forward a copy of this questionnaire to the recipient district along with official notification of the donation. Your district should also contact the recipient district directly to ensure that restrictions on the awards have been clearly communicated and applications will be submitted in a timely manner.

If your district is donating a Cultural Ambassadorial Scholarship, please refer to the Rotary International Web site for a list of language training institutions which have been approved by the Trustees for 2002-03 Cultural Ambassadorial Scholar assignments. If that list does not include an institution within your district and your district wishes to host the scholarship recipient, or if you wish the candidate to study a language other than those listed on the Rotary International Web site, you may suggest an alternate institution, provided it meets the following requirements:

1. Minimum of three hours of group classes per day, five days per week
2. Availability of different class levels
3. Availability of suitable host family arrangements
4. Reasonable costs

Please check the type of scholarship your district is donating:

- Academic-Year Ambassadorial Scholarship
- Two-Year Multi-Year Ambassadorial Scholarship
- Three-Month Cultural Ambassadorial Scholarship
- Six-Month Cultural Ambassadorial Scholarship

Donated from District _____

to District _____

for a candidate from _____
(country, if applicable)

Indicate any assignment restrictions placed on the scholarship by checking the appropriate statement:

- The candidate must be assigned to a study institution located in our district or district(s).
- The candidate may be assigned to any study institution in any Rotary country listed on his/her application.

Note: Assignment restrictions placed on donated awards may hinder the selection of a successful candidate by the receiving district's selection committee.

If restricting assignment to your district, please suggest at least two study institutions within your territory and forward institution information or catalogs to the recipient district governor. (Note: This is not necessary if your district is donating a Cultural Ambassadorial Scholarship and there is already an approved language school located in your district, as listed on the Rotary International Web site.)

Institution _____

Contact _____

Address _____

Fax _____

E-mail _____

This form was completed by:

Name (please print)

District office

Address

Telephone

Fax

E-mail

District

Date

Institution _____

Contact _____

Address _____

Fax _____

E-mail _____

Return by fax or mail to:

**The Rotary Foundation — PL100
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Telephone: (847) 866-3362
Fax: (847) 328-8554**

**Return this form with your
SHARE Decision Worksheet by
1 March 2001**



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

