



The Rotary Foundation is a **very important** part of the whole Rotary experience. If clubs take the time to learn the process, it is an excellent way to get involved internationally and do some good in the world, as well as, make Rotarian friends from other countries.

Do you as a normal Rotarian need to learn every “nook and cranny” of the Foundation? Absolutely not! Do you as a normal Rotarian need to have a basic working knowledge of the workings of the Foundation. Yes! Hopefully, this “Foundation for Dummies” will help you understand the foundation enough to at least be able to carry on a knowledgeable conversation about grants when you are at a Rotary function like a Rotary meeting/convention/seminar/bar. We’ll leave the complicated process to the club’s Grant Committee. And, by the way, hats off to the Grant Committee because it is a behind the scenes job that is hard, misunderstood and usually, unappreciated. OK - Here we go -



The Rotary Foundation offers Rotarians three grant types:
district grants, global grants and packaged grants.

District Grants -

District Grants fund short-term projects and activities, either local or international that support the Foundation’s Mission (***Areas of Focus*** (more on that later)). Clubs submit their requests to the district, which administers and distributes the funds. These are simple grants. The club, or partnership of clubs, come up with money to help fund a local or international need that they have identified, and the district will match that amount ***up to \$2000 per club.***

Global Grants -

Global Grants fund large-scale projects and activities that

- * Align with an ***Area of Focus*** (more on this later)
- * Respond to a ***need*** the benefiting community has identified
- * Include the active participation of the benefiting community
- * Are designed to enable the community to help itself after the Rotary club or district has concluded its work. ***Sustainability*** is the key word here.
- * Have measurable results
- * Projects must have a minimum total budget of \$30,000
- * Must be sponsored by at least two clubs: a host partner(s) in the country where the activity takes place and an international partner(s) outside that country.

Packaged Grants-

Packaged Grants support predesigned projects developed by the Foundation and its strategic partners, which are organizations that work in one or more of Rotary’s ***Area of Focus*** and can offer financial support, technical expertise, or advocacy. The Foundation and the strategic partner provide 100 percent of the funding; Rotarians implement the grant project. Basically, all the work is done by Rotary and you just need to sign on. Some examples of Strategic Partners are: Shelter Box, Global Food Banking Network, Dollywood Foundation, International Reading Association, Goodwill Industries and Youth Service America.

To participate in Rotary Foundation Global and Packaged grants, the club must agree to implement the financial and stewardship requirements. In other words, the club needs to **qualify**. To do this the club must read, agree to and sign what's called the **Memorandum of Understanding**. This is all you need to know. Easy uh! Only the club president and the foundation chairperson need to know how to qualify. So let's move on.



You can skip this if you wish -

Qualifying involves understanding the club officer responsibilities, financial management, bank account requirements, necessary reports, use of grant funds, document retention and the misuse of grant funds, as well as, other stuff. The three page **Memorandum of Understanding** can be found at www.rotary.org/en/document/620



Projects that receive Global Grant funds from the Rotary Foundation must fall under at least one of the following **Areas of Focus**.

(This really isn't a warning, but just I wanted to use that cute logo.)

I told you I was going to talk about the **Areas of Focus**, so here we go.



- * Peace and conflict prevention/ resolution
- * Disease prevention and treatment
- * Water and sanitation
- * Maternal and child health
- * Basic education and literacy
- * Economic and community development.



The Rotary Foundation is a different entity from Rotary International. Although the Foundation board is made up of Rotarians they are not the same Rotarians that sit on the Rotary International Board. If you want to see who is on the Foundation Board go to: www.rotary.org/en/trustees

If I want to be smarter and impress the club, where do I look?

As I said above, the Memorandum of Understanding is at - www.rotary.org/en/document/620

The Foundation Reference Guide is at - www.rotary.org/en/document/518

The Foundation Board can be found at - www.rotary.org/en/trustees

Packaged Grant can be found at - www.rotary.org/en/packaged-grants

The 32 pages of the Grant Management Manual is at - www.rotary.org/en/document/673

The meeting notes from the last Foundation is at - www.rotary.org/en/document/101076

A lot of valuable information about the application process, grant writing, reports, worksheets, plans and a neat chart of the District Grants in process can be found on the District Web under the heading RI Foundation - www.rotary5520.org

FOUNDATION FUNDING

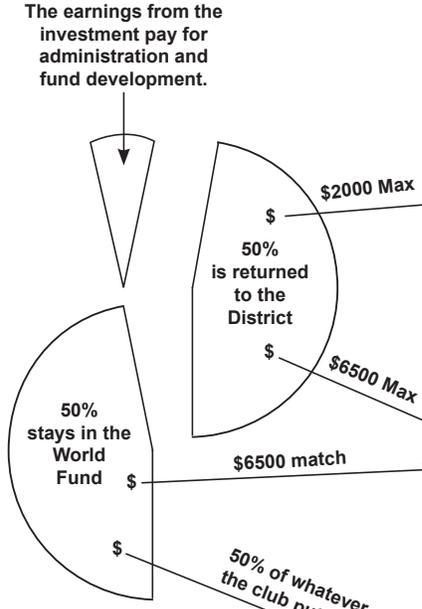
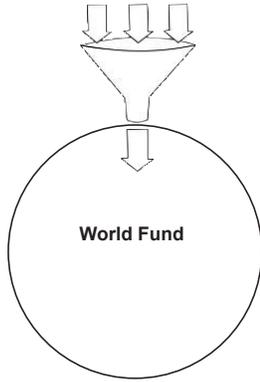
This is only the money that Rotarians in OUR district send in. The more we send in, the more we get back in 3 years to spend on District Grants.

 For a definition of the funding sources, see last page



Important Stuff

- Bequest Society member
- Sustaining Members
- Paul Harris Fellows
- Arch C. Klumph Society and Rotarians like you. Thank You!
- Benefactors
- Major Donors
- Paul Harris Society



COMMUNITY GRANTS
These are the simple grants. Sometimes there are referred to as "Simplified Grants"
The district matches club(s) commitments up to \$2000 per club involved. They can be local or international in scope.

GLOBAL GRANTS
These are a little trickier.
\$30,000 minimum grant required total (counting all clubs involved and all District matches and World Fund matches)

Pay attention -
The District will match a maximum of \$6500.
The World Fund will match the District's \$6500

The club(s) must put up a minimum of \$6500 to get the maximum benefit of the \$6500 from the District and the World Fund. If they put up less, the District and World Fund will only match that amount.

Now to step 2
The club(s) can put in all they want over \$6500. The District will not put anymore in, but the World Fund will match 50% of the total amount the club(s) put in.

I think that a couple examples is all we need to "Hit the Target". See next page for 3 examples.

GLOBAL GRANTS EXAMPLES - A Rotary club is Juarez wants to drill a well in the colonias to get pure water to the folks that live there. This will, not only, get them fresh water, but also will lessen diseases. They contact a club in El Paso to partner with. Let's assume all the paperwork is get done correctly and on time, and the grant is approved. Remember, the paperwork is the job of the president and the committee chair.

Example 1:

Juarez District Club

Club puts in	\$6500
District matches	\$6500
World Fund matches district	\$6500
World Fund also matches Club amount at 50%	\$3250
TOTAL GRANT MONEY FROM JUAREZ	\$22,750

El Paso District Club

Club puts in	\$10,000
District matches up to the maximum	\$6500
World Fund matches District	\$6500
World Fund matches 50% of club (no max)	\$5000
TOTAL GRANT MONEY FROM EL PASO	\$28,000

TOTAL GRANT MONEY THAT WILL GO TO PROJECT - \$50,750

Example 2: Let's see what the minimum a club will have to put in to participate in a \$30,000 minimum Global Grant.

Juarez District Club

Club puts in	\$4300
District matches	\$4300
World Fund matches district	\$4300
World Fund also matches Club amount at 50%	\$2150
TOTAL GRANT MONEY FROM JUAREZ	\$15,050

El Paso District Club

Club puts in	\$4300
District matches up to the maximum	\$4300
World Fund matches District	\$4300
World Fund matches 50% of club (no max)	\$2150
TOTAL GRANT MONEY FROM EL PASO	\$15,050

TOTAL GRANT MONEY THAT WILL GO TO PROJECT - \$30,100

***It looks like that if only two club were working together, they would each have to put up \$4300 to meet the \$30,000 minimum to sponsor a Global Grant.**

Example 3: Our last example will be wild. Suppose the two clubs don't have \$4300 each but, due the desire of wanting to do an International project, what can they do? They can partner with other clubs! Check out this wild example below -

Juarez District Club

Club puts in	\$4300
District matches	\$4300
World Fund matches district	\$4300
World Fund also matches Club amount at 50%	\$2150
TOTAL GRANT MONEY FROM JUAREZ	\$15,050

El Paso District Club

West Club puts in	\$1000	Four Clubs' total is: \$11,500
East Club puts in	\$4000	
Northeast Club puts in	\$6000	
Franklin Mountains Club puts in	\$500	
District matches up to the maximum	\$6500 (that's the max. they match)	
World Fund matches District	\$6500 (they will only match the dist.)	
World Fund matches 50% of club total (no max)	\$5750 (50% of clubs' total, remember?)	
TOTAL GRANT MONEY FROM EL PASO	\$30,250	

TOTAL GRANT MONEY THAT WILL GO TO PROJECT - \$45,300

See how that works? A small club like Franklin Mountains can participate in a large, international grant. If they play this up in the club, they can get the members excited about helping a community in another land. Good press for new and prospective members.

OK - I think I have said enough. Congratulations on graduating from the Rotary Foundation "School of Dummies"!

If you still don't understand the concept, I plan on publishing a Rotary Foundation Coloring book later.

WAYS THAT MONEY GETS INTO THE FOUNDATION FUND

- **Rotary Foundation Sustaining Member**, when you give \$100 or more per year to the Annual Fund.

- **Benefactor**, when you include the Endowment Fund as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.

- **Paul Harris Fellow**, when you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. You are recognized as a Multiple Paul Harris Fellow with each additional gift of \$1,000.

- **Paul Harris Society member**, when you give \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant.

- **Bequest Society member**, when you give \$10,000 or more via your estate plans. All society members receive recognition from the Trustees of The Rotary Foundation, and donors can choose to receive an engraved crystal recognition piece and a Bequest Society pin.

- **Major Donor**, when your cumulative donations reach \$10,000. You can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant. Recognition items commemorate giving at these levels:
 - 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 \$249,999

- **Arch C. Klumph Society**, when your cumulative giving reaches \$250,000. We will invite you to an induction ceremony at the Rotary International headquarters in Evanston, Illinois, USA and include your picture and biography in the Arch C. Klumph Society interactive gallery. You will also receive invitations to society events, along with membership pins and crystals that commemorate giving at these levels:
 - **Trustees Circle**: \$250,000 to \$499,999
 - **Chair's Circle**: \$500,000 to \$999,999
 - **Foundation Circle**: \$1 million and above
 - **Don Powell Circle**: \$10 and below. No checks

and from Rotarians like you. Thanks You!