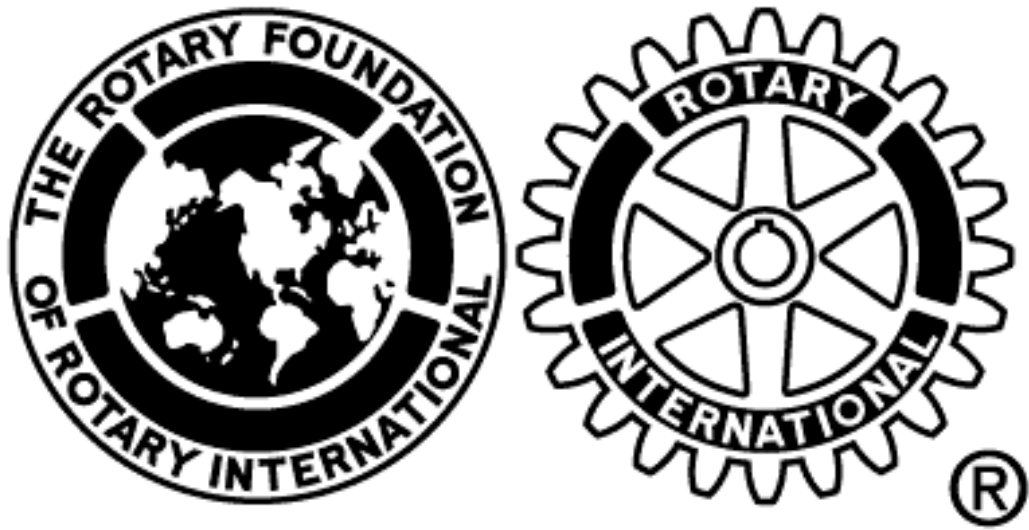


THE ROTARY FOUNDATION



What do you need to know?

A simple guide to the Rotary Foundation.

District Governor Val Leivers 2010 / 2011

District 1220

WHAT IS THE ROTARY FOUNDATION?

The Rotary Foundation is Rotary's own CHARITY

Rotarians and Rotary clubs work with many charities but our own charity in Rotary International is the Rotary Foundation.

The Foundation supports the efforts of Rotary International in the fulfilment of the Objects of Rotary, Rotary's mission and the achievement of world understanding and peace through local, national and international humanitarian, educational and cultural programmes.

HOW IS IT FUNDED?

Each year individuals and clubs donate funds to the Foundation's Annual Programmes Fund. It is up to individuals or clubs to choose how they raise the money. It can be given as a straight donation, included as part of the club's subscription or by holding a fund raising event.

It is important to have donations to the Rotary Foundation Gift Aided if at all possible as this provides an additional 25 pence in the pound to the donation and only needs one declaration from each member to declare that they are a United Kingdom tax payer.

In District 1220 for 2011/12 year the Annual Giving recommended amount per member is £43.00 which is the approximate equivalent of US\$68. With Gift Aid this becomes £53.75, approximately \$86 per member.

Rotary International asks that all members work towards the target of giving \$100 per member per year.

All donations are sent to RFUK, Rotary Foundation at RIBI headquarters in Alcester.

WHAT HAPPENS NEXT?

The donations are then sent to the Rotary Foundation in Evanston, Chicago. All donations received into the Annual Programmes Fund are invested and the Rotary Foundation retains the donated monies centrally for three years.

At that point the income generated on it is used to fund operating expenses and the donated total is released for projects. Since 1947 donations on charitable activities have totalled over \$1.2billion.

The District will receive 50% of the funds paid into the Annual Programmes Fund in 2010/2011 to spend in the Rotary year 2013/2014.

As I have said the Annual Programmes Fund is a rolling programme. At the end of each year, each District's contributions from three years ago are released and allocated as follows.

50 % to the World Fund and 50% to the District Designated Fund.

The World Fund pays for: Matching Grants, Group Study Exchange and 3-H Grants (Health, Humanity and Hunger).

The District Designated Fund pays for: Ambassadorial Scholars, Grants for Peace Scholars, District Simplified Grants and top up grants for Matching Grants.

In 2011/2012 we will spend 50% of the donations we paid into the Annual Programmes Fund in 2008 / 2009.

For example: If District 1220 donated US\$72,000 to the Foundation in 2008/2009 we would receive US\$36,000 back into the District Designated Fund to spend in 2011/2012.

Please note: All Rotary transactions are in the US dollar. Rotary International sets the monthly exchange rate which at the time of writing is \$1.5 to the £.

HOW DOES THE DISTRICT DECIDE HOW TO USE THE FUNDS?

Each November we hold a Foundation Seminar clubs when are asked to vote on the Foundation programmes that they wish to support for the following year.

In recent years members in D1220 have voted to either send a one year Ambassadorial Scholar to study abroad or to donate a scholarship to a nominated District abroad for someone to come to study here, support the Peace Studies Scholarship Programme, support the District Simplified Grant Programme and the Matching Grant Programme.

In 2011/12 we expect to send one scholar to study abroad at a cost of US\$26,000 from our District funds.

In addition we will donate to the Peace Studies and Polio Eradication programmes and we are supporting the Matching Grants programme and the District Simplified Grants programme.

WHAT ARE THE PROGRAMMES OF THE ROTARY FOUNDATION?

HUMANITARIAN: District Simplified Grants, Matching Grants, 3-H Grants and Polio Plus.

EDUCATIONAL and CULTURAL: Ambassadorial Scholars, Group Study Exchange and Peace Scholarships.

HOW TO PARTICIPATE IN HUMANITARIAN GRANTS.

DISTRICT SIMPLIFIED GRANTS:

Ask: "What is the project about and how much will it cost? Where are you getting the money from?"

Always plan properly before you start the application. Select a project and state how it will meet the needs of the community.

Select a primary contact who needs to be a Rotarian from your club and a committee of a further two people to oversee the expenditure of funds.

IF YOU ARE WORKING WITH ANOTHER ROTARY CLUB PLEASE CHECK THAT IT IS UP TO DATE WITH GRANT REPORTING BY CONTACTING THE ROTARY FOUNDATION.

Draw up a project budget and obtain price quotes from the suppliers. Include any other costs which must be attached to the application for each item.

Make it clear who will own the equipment, materials and supplies, who is responsible for maintenance, has Customs clearance been arranged if needed and list how the project is to be financed. Funds come from your club as the primary club, other Rotary clubs and Districts.

Use additional funding such as from public appeals, donations from companies or local authorities etc.

A District Simplified Grant can be used for a project locally or internationally. You do not need a recipient club to work with but you do need a reliable contact in the other country to ensure the funds are used correctly. Often when a local Rotarian visits a country or the international District has sent a Group Study Exchange team to us they will have made valuable contacts.

Example project: To provide a missing amenity for a local town, such as a garden for quiet remembrance and reflection.

The Council will maintain the garden and the Rotary club is working with the local District Council.

The total cost is £8,300. The money will be raised by the Rotary club, the County Council and a public appeal.

The amount requested from the District Simplified Grant Fund is £1,000.

The project will be advertised in the local newspaper with posters in the library, banks, building societies and Town precincts.

The Rotarians from the club will be actively involved with creating the garden.

.....

HOW IS A DISTRICT SIMPLIFIED GRANT FUNDED?

A District can request one District Simplified Grant per year from the Rotary Foundation of up to 20% of the District Designated Fund (DDF)

Example: Remember that the amount of the available DDF is dependent on the Annual Giving 3 years earlier.

If the total amount for the year in the DDF is \$ 50,000

The District can request up to 20% of the DDF.

20% of \$50,000 = \$10,000

This money is paid direct to the District Treasurer for distribution by the District Grants Chairman, John Moffatt, Rotary Club of Burton upon Trent for projects.

ADVANTAGES: The funds are in your local currency and it speeds up the whole process. Grants can be used for local as well as international projects. You do not need a recipient Rotary club in another country.

DO NOT SPEND YOUR DSG MONEY BEFORE YOU RECEIVE IT AND REMEMBER THAT THE PROJECT MUST BE COMPLETED IN THE SAME ROTARY YEAR AND FULL REPORTS COMPLETED.

Provide information indicating if the project is viable and how it will be maintained along with evidence of community involvement and ownership.

Last year District 1220 put a limit of up to £1,000 per project on the fund but this depends on how each District Foundation committee wish to use their funds. Some Districts choose not to use the DSG funding at all.

All Grant Application forms are available on the RI website at www.rotary.org

All completed application forms must be sent to the District Grants Chairman.

MATCHING GRANTS

Who can apply?

Rotary clubs and Districts.

Who funds it?

The Foundation's World Fund and DDF.

How does the match work?

Cash contributions, i.e. all monies collected by the Rotary club or group of clubs or other sources

CASH MATCH = 50% FROM RI

Any donation from the DDF, your own District or any other District, e.g. your Twinning District – the MATCH = 100% from RI.

At the present time the smallest match is \$5000.

An example: If a club collects cash	\$6000
DDF contribution	\$2000
The cash match will be @ 50%	\$3000 –half of the \$6,000
The DDF match will be @100%	\$2000 – matching the DDF element.
Total available for the project	\$13000

**This gives a match of \$5000, i.e. \$3,000 + \$2,000 as above.
The club would need to raise approximately £3,500.00 but remember that this will vary with the exchange rate.**

WHEN DOES A CLUB NEED TO APPLY FOR A GRANT?

Applications will be accepted between 1 July and 31 March each year.

Applications will be approved by Rotary International from 1 August to 15 May each year.

HOW DOES A CLUB START THE PROCESS?

Select a country to work with and a project that you would like to be involved with. You can contact any District Governor from the International Directory and request ask if there are clubs there who wish to do a project.

All recipient clubs are required to donate a minimum of \$100 to the project. Ask the international club if their District has any DDF available as this can make a difference to the value of the project.

Remember, that you can also work with and include any twinned clubs and their Districts. Some clubs in other countries are in a position to contribute large sums of money to a project and they may also be willing to use their District funds. You need to explore every avenue before embarking on a project.

When you have selected a project ensure it fulfils all the criteria set down by RI. Funds cannot be used for buildings for example but you can equip them.

Establish a committee of 3 Rotarians in both countries, i.e. our District and the Rotary Club in the country where the project will take place.

Maintain communication and dialogue for the life of the project. Jointly assess community needs and plan the project with the Rotarians on the ground who will have detailed information and contacts.

Stewardship of the project is vital. Ensure that all reports, both interim and final, are sent to RI on time. The host sponsors are limited to five open Matching Grants at any one time.

REPORTING

Both international and host sponsors must work together to prepare and submit interim and final reports. Sponsors are required to submit an interim report by May 31 each year until the final report is completed.

A final report is due 2 months after the completion of the project. Before starting a project in India or Nepal please check with your District Rotary Foundation Chairman to check if there is a ban on the international District. Failure to send reports on time will lead to clubs and Districts being disqualified for taking part in projects until the reporting is current.

Complete all Grant applications and send to your Grants Chairman, NOT directly to Rotary International.

3 H Grants- Health Humanity and Hunger. These are available to assist in much larger projects.

FOUNDATION WORKS VERY CLOSELY WITH INTERNATIONAL COMMITTEES.

International provides the projects, Foundation helps to fund them.

Foundation is not a disaster fund and does not go straight into disaster areas. Foundation comes into its own when all the other agencies have left and the rebuilding of lives begins. Through the many grant programmes Foundation helps thousands of people every year. We are all aware that the largest project Rotary has ever attempted is the Eradication of Polio.

Polio Partners still carries on and clubs are working towards the \$200 Million Dollar Challenge which ends at the end of June 2012. We are so close to ridding the world of this dreadful disease but must remain vigilant to see a final end to children being handicapped for life.

EDUCATIONAL PROGRAMMES

The next important role of the Rotary Foundation is the educational aspect of our charity.

Rotary Scholarships :

Academic -Year Ambassadorial Scholarships.

Two Year Peace and Conflict Resolution Studies scholarships.

Please note that Grants for University Teachers, Volunteer Service grants and Cultural and Multiyear Ambassadorial scholars have been discontinued.

Rotary Ambassadorial Scholarships.

A detailed brochure is available from the RI website - form 132-EN.

These programmes offer students from all over the world the opportunity to study in another country. They are ambassadors of goodwill and most of the scholars that we receive in this District are Academic Year scholars studying at one of our local Universities.

The role of the club with Ambassadorial scholars.

Rotarian Counsellors.

A unique benefit of Rotary Scholarships is the scholars association with Rotary clubs and Rotarians. Each scholar is assigned a sponsor and host Rotarian Counsellor who provide orientation and advice in preparing for and completing a successful study period in another country.

When applicants come for an interview a good candidate will have background knowledge of Rotary International in general and especially the Ambassadorial Scholarship programme. They will be expected to be able to give their opinions on national and international affairs. It is a great help if a small number of the club interviewing committee prepare the candidate by holding a mock interview.

If the candidate has not already found the RI and District websites please point them in the right direction. A well prepared candidate is far more relaxed and tends to do themselves justice. After the interview the candidates and the sponsor clubs will be contacted with the results.

Incoming Scholars.

Clubs may choose to become involved with incoming Ambassadorial Scholars by one of the members acting as a Counsellor. This is a rewarding, enjoyable job and full details are available from the Ambassadorial Scholar Co-ordinator Rtn Keith Pollard, the Rotary Club of Chesterfield Scarsdale. Requests for Counsellors will appear throughout the year and Rotarians who are interested in the position can get more details from the RI information sheet on the RI website.

Finding a suitable Ambassadorial Scholar candidate, who can apply?

General Eligibility: Applicants must have completed 2 years of University or college course work
OR

Have been employed in a recognised vocation for at least 2 years at the time when the scholarship begins. All applicants must be citizens of a country in which there is a Rotary club.

How do they apply?

Initial application must be made through a Rotary club based and the applicant must be a permanent resident in the District or work within the District. Persons with disabilities and members of Rotaract Clubs are eligible to apply but relatives of Rotarians are not eligible.

What does the club do next?

Once a candidate has been identified your club should form a small committee to meet the candidate to decide if you feel the candidate is suitable to put forward for consideration. Invite the candidate to a club meeting and allow the candidates a few minutes to speak to the members.

After the meeting the club decides if they will propose this person for a scholarship and if they do appoint a club member to be responsible for the applicant. This will usually be the member who will act as Counsellor if the candidate is successful.

Ask the candidate to complete the application form available from your Ambassadorial Scholar Co-ordinator or the person responsible for this part of the programme. In 2011/12 it will be Peter Halliday, Rotary Club of Bretby.

The counsellor must ensure the application is complete and check that a choice of Universities has been selected. Also check that the candidate has completed a language proficiency test if they wish to study in a different language.

All references need to be attached to the application together with the two required essays.

Before the completed application is sent to the person nominated by the Foundation Chairman ensure that the club endorsement has been signed by the President of the club. In form the candidate of the date of the District interviews.



Group Study Exchange (GSE)

How can club level Rotarians become involved in Group Study Exchange?

Rotarians can promote GSE in their communities by identifying qualified team member candidates or businesses that may have potential applicants. Team members must be between 25 and 40 at the time of travel and be working in their chosen profession for at least two years. A team consists of four non Rotarians and a Rotarian Team Leader who is selected by a District Committee from the Rotarian applicants to lead the team. Applications for a place on a GSE team must be through a Rotary Club.

Rotarians can offer to host visiting GSE team members in their homes and participate in the local hosting itinerary for the team. Rotarians should invite GSE Alumni to speak at Rotary club meetings so that the club can learn about the programme and meet local participants.

The Group Study Exchange Officer for 2011/2012 is Rob Gray, R.C Vale of Belvoir and the proposed incoming team will be from Pakistan. There will not an outgoing team in 2011 / 12. However, in 2012 / 13 there will be a two way exchange with a country yet to be decided.

PAUL HARRIS FELLOWSHIP.

The Paul Harris Fellowship was **NOT** introduced for recognition of outstanding service but to raise funds for the Rotary Foundation.

However, in RIBI we choose to give a Paul Harris Fellowship to a person whom the club feels they would like to recognise for their service to humanity and it does not have to be a member of a Rotary club.

In most countries individuals buy Paul Harris Fellowships by donating \$1,000 to the Rotary Foundation. This brings new money into the Rotary Foundation and multiple Paul Harris Fellowships are common in many countries.

A Paul Harris Fellowship costs \$1000 or 1000 credits from the club's Annual Giving recognition. For every dollar a Rotary club or individual contributes to the Annual Programmes Fund, the Rotary club or individual receive recognition points.

When a club or individual reach 1,000 credits they can either have an award themselves or award one to someone else.

If a club in RIBI wishes to award a Paul Harris Fellowship and need help please contact the District Foundation Chairman who is Terry Leivers, Rotary club of Sherwood Sunrisers, in District 1220.

If a club needs to know how many credits they have please contact your District Foundation Chairman who has access to this information. The PHF application form is available in the download section of the RI website at www.rotary.org

Fill in the recipient's name in section 3.

Tick the box in the contributions section "Annual Programmes Fund eligible for SHARE"

Section 2: Tick the box "New Paul Harris Fellow".

Section 4: Tick the last box with delivery details and also tick the box if you wish the award to be a surprise

Please allow for up to four weeks for the award to arrive..

Send the form to RIBI. The recipient will receive a presentation certificate and a lapel pin. If you wish to also give a ribbon and medallion which cost about \$12 you need to apply through the RI website.

SUMMARY

In this document I have tried to simplify the work of the Rotary Foundation. Most of the basic information you need is in this document and the information sheets on the RIBI, RI and District web-sites.

If you have any queries please make use of the vast knowledge of the members of the District Foundation Committee.

The Rotary Foundation changes lives. IF YOU NEED HELP, ASK!

District Governor Val Leivers
District 1220 Foundation Chairman 2003 - 2006
RIBI Foundation Committee – District Grants Specialist 2004/5

