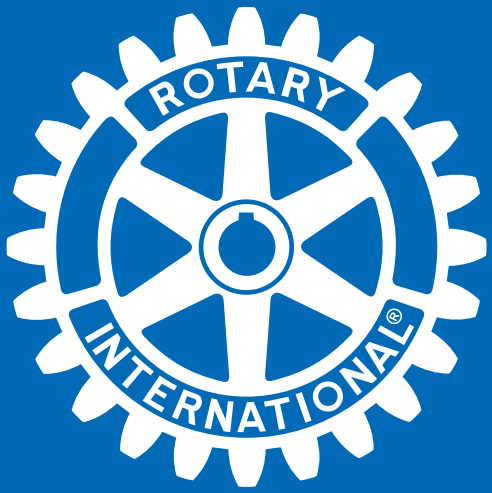


THE ROTARY FOUNDATION

REFERENCE GUIDE

The Rotary Foundation

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All figures are in U.S. dollars.

THE ROTARY FOUNDATION

The Rotary Foundation helps Rotary members advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty. The Foundation is a not-for-profit organization supported solely by voluntary contributions from Rotary members and friends of the Foundation who share its vision of a better world. This support is essential to making Foundation grants possible, which bring sustainable improvement to communities in need.

The Rotary Foundation

POLIOPLUS

Polio eradication is Rotary's top philanthropic priority. Rotary launched the PolioPlus program in 1985. In 1988, when Rotary began working with its partners in the Global Polio Eradication Initiative, there were more than 350,000 polio cases in over 125 countries. Since then, more than 3 billion children have been immunized against polio, and the incidence of polio has decreased 99.9%.

> By the time the world is certified polio-free, Rotary's contributions to the global eradication effort will exceed $3.1 billion, including $1.6 billion in matching funds from the Bill & Melinda Gates Foundation.

POLIOPLUS GRANTS

PolioPlus grants fund global polio eradication efforts in countries where polio is endemic and in countries at risk for the disease. Grants support immunization campaigns and monitoring of poliovirus transmission.

PolioPlus grants are funded from the general PolioPlus Fund and District Designated Fund contributions.

Grant proposals are submitted primarily by major implementing partner agencies, such as the World Health Organization and UNICEF. Foundation Trustees consider PolioPlus grant requests at regularly scheduled meetings.

POLIOPLUS PARTNERS GRANTS

PolioPlus Partners grants support urgent social mobilization and surveillance projects, which are submitted by the national PolioPlus committee chairs in high-priority countries. The grant applications are considered on an ongoing basis and are funded from the general PolioPlus Fund.

POLIOPLUS RESOURCES

- End Polio Now newsletter: Updates about polio eradication efforts, published every two months
- End Polio Now Resource Center: A variety of materials to help advocate, fundraise, and educate
- End Polio Now pins: Lapel pins with the End Polio Now logo
- 5 Reasons Why We Must Eradicate Polio flyer: The top reasons to work toward a polio-free world

For more information and resources, visit endpolio.org.

ROTARY PEACE FELLOWSHIPS

Rotary Peace Fellowships enable peace and development leaders from communities around the globe to pursue either a master's degree in related fields (such as international development, peace studies, or conflict resolution) or a professional development certificate in peace and conflict studies at one of our Rotary Peace Centers located at premier universities worldwide.

Fellowships cover tuition and fees, room and board, round-trip transportation, and all internship and field-study expenses. The fellowships are supported by District Designated Funds donated by Rotary districts, directed gifts from individual donors, earnings from The Rotary Foundation's Endowment, and when necessary, funds from the World Fund.

Each year, districts promote the fellowship program, recruit candidates, and mentor them to help them submit their online applications by 15 May. Clubs and districts can also provide recommendations on behalf of candidates. Up to 50 fellows are selected annually to pursue master's degrees and 80 to pursue professional development certificates. The candidates who are selected by the Trustees are notified in November.

ROTARY PEACE FELLOWSHIP RESOURCES

- Rotary Peace Centers Facebook page: Updates from the peace centers, fellows, and peace-related initiatives
- Referral form: Form to request that information be sent to an individual about applying for a fellowship
- Certificate postcard: Information about certificate programs and centers
- Master's postcard: Information about master's programs and centers
- Rotary Peace Fellowships presentation: Overview of Rotary Peace Centers programs

- Become a Peacebuilder District: Flyer about how districts can support peace fellowships

For more information and resources, visit rotary.org/peace-fellowships.

ROTARY HEALTHY COMMUNITIES CHALLENGE

The Rotary Healthy Communities Challenge provides Rotary members in specific countries with longer-term resources to implement large-scale, high-impact programs to reduce severe disease and death from malaria, pneumonia, and diarrhea — top killers of children under five years old. The challenge focuses on improving the accessibility and quality of sustainable community health systems, especially for vulnerable populations.

The Rotary Foundation, World Vision, and the Gates Foundation are collaborating to award $30 million total to member-led programs in four countries — the Democratic Republic of the Congo, Mozambique, Nigeria, and Zambia. The countries were selected based on their disease burden, the engagement and presence of Rotary members, the potential for partnerships, and the alignment with individual ministry of health strategies.

Rotary members in each participating country formed one committee to develop a program that is organized for success, can create lasting change, and will use strong monitoring and evaluation systems to measure the outcomes. The programs will be implemented from 2024 to 2027.

For more information and resources, visit my.rotary.org/rotary-healthy-communities-challenge.

GRANTS

The Rotary Foundation offers grants that support a variety of service activities, scholarships, and training sponsored by clubs and districts around the world.

TYPES OF GRANTS

District grants

District grants are block grants that enable clubs and districts to address needs in their communities and abroad. Districts may request up to 50% of their District Designated Fund (DDF) for one grant annually (refer to the Annual Fund-SHARE section on page 12) to support district- and club-sponsored activities, such as vocational training teams, scholarships, service projects, and youth programs that align with the Foundation's mission.

Global grants

Global grants offer clubs and districts opportunities to participate in strategically focused, high-impact activities. These grants fund large-scale and international service projects, vocational training teams, and graduate and postgraduate scholarships that have sustainable, measurable outcomes in one or more of Rotary's areas of focus (refer to page 8).

> Sustainability means different things to different organizations. For The Rotary Foundation, sustainability means the capacity for outcomes to be maintained locally and to serve the community's continuing needs.

Global grant-funded activities have a minimum budget of $30,000. Grant sponsors can use a combination of District Designated Funds, cash, and directed gifts and endowment earnings to fund a global grant. The Foundation will provide an 80% World Fund match for all DDF contributions. The maximum World Fund match is $400,000; there is no minimum.

All global grants need to be sponsored by two clubs or districts: a host sponsor in the country where the activity takes place and an international sponsor outside that country.

When planning a global grant to support a service project or a vocational training team, sponsors need to conduct a thorough community assessment to understand the local history, culture, strengths, assets, needs, and priorities. The assessment results should inform the project design and need to be included in the grant application. Local Rotary members and program alumni who are experts can offer valuable guidance early in the planning process.

Disaster response grants

Disaster response grants support relief and recovery efforts in areas affected by natural disasters within the past six months. Qualified districts in affected areas may apply for grants of up to $25,000, depending on the availability of funds. Districts can apply for additional grants after they report on any previous disaster response grants.

Grant funds can be used to provide basic items such as water, food, medicine, and clothing. Districts that request help are responsible for determining the needs in communities affected by a disaster. They should work closely with local officials and community groups to ensure that the funding meets those needs.

PROGRAMS OF SCALE GRANTS

Rotary's Programs of Scale grants build on the evidence, impact, and sustainability of successful Rotary service projects in our areas of focus by supporting larger and longer-term programs. These grants fund efforts by Rotary members, in partnership with other organizations, to expand proven program models to benefit more people in more places and to foster lasting change.

The Rotary Foundation can award one $2 million Programs of Scale grant each year to a program sponsored by a qualified Rotary or Rotaract club or a district, which is working in strong collaboration with partner organizations. The first phase of the competitive application process requires a concept note summarizing how the program has demonstrated success in achieving measurable results and how it is ready to scale. The clubs or districts that submit the strongest concept notes — as determined by members of the Foundation's Cadre of Technical Advisers and other experts — are invited to submit full proposals.

Proposals include a full implementation plan with a detailed budget, commitment letters from implementation and investment partners, and plans for monitoring, evaluation, and learning that are fully integrated into the program.

For more information and resources, visit rotary.org/programsofscale.

AREAS OF FOCUS

Rotary is dedicated to causes that build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever. While these causes are central to all Rotary service projects, activities funded by global grants and Programs of Scale grants work toward specific goals in one or more of the Foundation's areas of focus:

- Peacebuilding and conflict prevention
- Disease prevention and treatment
- Water, sanitation, and hygiene
- Maternal and child health
- Basic education and literacy
- Community economic development
- Environment

Learn more about the specific goals of each area of focus in the Areas of Focus Policy Statements.

QUALIFICATION AND STEWARDSHIP

What districts need to do

To participate in grants, districts need to complete an online qualification process in which they agree to adhere to and implement the financial and stewardship guidelines in the district memorandum of understanding. Each district also needs to conduct a grant management seminar as part of the qualification process for clubs. Districts can opt to replace or supplement in-person grant management seminars with online courses in the Learning Center.

What clubs need to do

Clubs need to complete an annual qualification process to be eligible for global grants. To qualify, clubs need to complete the district's grant

management training, sign and adhere to the club memorandum of understanding, and fulfill any additional qualification requirements set by the district.

GRANT APPLICATION PROCESS

After they are qualified, clubs and districts can submit grant applications through the Grant Center. Applications for global grant scholars who will begin their studies in August, September, or October need to be submitted to the Foundation by 30 June. Applications involving travel need to be submitted 90 days before the travel dates.

REPORTING

Completed reports for district and global grants need to be submitted to the Foundation every 12 months for the duration of the grant, with a final report due within two months of the completion of the grant-funded activity. Completed reports for disaster response grants are due six months after payment. Reports are submitted through the Grant Center.

GRANT RESOURCES

- Giving & Grants: Quarterly newsletter with information about fundraising and grants
- A Guide to Global Grants: Detailed information for clubs and districts on managing global grants
- Grant Management Seminar learning plan: Online courses in Rotary's Learning Center that prepare clubs and districts to apply for and manage global grants
- Conducting Community Assessments: Tips for clubs as they conduct their community assessments
- Project Planning Resources: Tools to help plan and implement projects
- The Rotary Foundation Cadre of Technical Advisers
- Terms and Conditions for Rotary Foundation District Grants
- Terms and Conditions for Rotary Foundation Global Grants
- Terms and Conditions for Rotary Foundation Disaster Response Grants

- Areas of Focus Policy Statements
- Programs of Scale Grant Competition Handbook

ROTARY ALUMNI

The Rotary Foundation has a proud history of providing funding for more than 125,000 participants in our various scholarships and vocational exchanges. Rotary considers people who have received scholarships from the Foundation to be alumni, along with former participants in Rotaract, Interact, Rotary Youth Exchange, Rotary Youth Leadership Awards (RYLA), and other local and regional scholarships and programs.

Alumni are talented, committed people who know Rotary well and share our vision of furthering world understanding and peace. They are powerful advocates for Rotary because they personalize the concept of Rotary activities and demonstrate a commitment to the world community. They serve as volunteers for local and international service projects and are potential Rotary members and Foundation donors. They are also available to speak at Rotary functions. Contact your district alumni chair to find alumni available to engage in club activities.

ALUMNI RESOURCES

- Rotary Alumni Association of the Year Nomination Form
- Rotary Alumni Global Service Award Nomination Form
- Alumni association frequently asked questions: Includes basic information about Rotary alumni associations
- Get Ready: District Alumni Committee course in Rotary's Learning Center: Provides information and the best practices for district leaders who work with alumni

For more information, to learn more about past award winners, and to download resources, visit rotary.org/alumni or write to alumni@rotary.org.

FOUNDATION FUNDING

The Rotary Foundation transforms gifts into projects that change lives both close to home and around the world. As the charitable arm of Rotary, the Foundation supports a global network of members who invest their time, money, and expertise in our priorities, such as eradicating polio and promoting peace.

ANNUAL FUND-SHARE

Annual Fund-SHARE is the primary source of funding for a broad range of local and international Rotary Foundation activities.

Every Rotarian, Every Year (EREY) is the fundraising initiative designed to encourage support for the Foundation's Annual Fund. EREY asks every Rotary member to:

- Contribute to the Annual Fund every year
- Participate in a Foundation grant or program every year

Through Annual Fund-SHARE, contributions are transformed into grants that change lives.

Contributions to Annual Fund-SHARE are divided as follows:

- 47.5% is credited to the World Fund.
- 47.5% is credited to the District Designated Fund.
- 5% is credited to operating expenses.

The Foundation uses the World Fund portion to pay for the worldwide grant and program opportunities available to all Rotary districts. Districts use the District Designated Fund (DDF) portion to pay for the Foundation grants and programs they choose.

The Rotary Foundation's funding cycle makes DDF available for use three years after contributions are received. The three-year timeline gives districts time to plan projects and activities and allows the Foundation to invest the contributions. For instance, 47.5% of the contributions received during 2022-23 are available for spending in 2025-26.

Each district's Rotary Foundation committee decides how to use the DDF in consultation with the clubs in the district. Districts may use up to 50% of the funds (which might also include a spendable amount from gifts to the Endowment Fund-SHARE) for a district grant. Districts may use any amount of DDF for global grants or donations. Donation options include PolioPlus, peacebuilding programs, the Endowment, the World Fund, the Disaster Response Fund, or another district.

At the end of each Rotary year, DDF that has been unused for more than five years will be applied at the district's discretion to the PolioPlus Fund, Rotary Peace Centers, Endowment Fund, Disaster Response Fund, or World Fund. This will occur the first time on 1 July 2026. If a district doesn't advise the Foundation about where to direct the funds by 30 June 2026, the unused DDF will be transferred to the World Fund.

DDF empowers districts to undertake the projects that are most important to Rotary members in their areas. Contributions to Annual Fund-SHARE provide DDF for the future. Therefore, clubs and districts should set and review fundraising goals in Rotary Club Central to track and increase the financial resources available for Rotary Foundation grants and activities.

In addition to SHARE, donors may direct their Annual Fund contributions to the World Fund or to any of the Foundation's areas of focus. Annual Fund contributions directed to the World Fund or an area of focus are credited toward a club's annual giving goal and per capita giving, but they do not generate DDF. All Annual Fund contributions generate Foundation recognition points and count toward these recognition levels or programs: Every Rotarian, Every Year; Rotary Foundation Sustaining Member; Paul Harris Fellow; Paul Harris Society; Major Donor; and Arch Klumph Society. They also count toward club recognition opportunities.

Annual Fund-SHARE contributions are the primary source of funding for Foundation grants and are strongly encouraged.

DISASTER RESPONSE FUND

The Rotary Disaster Response Fund accepts cash donations from individuals and clubs, as well as DDF contributions. It is a general disaster-related reserve, and contributions cannot be designated for specific events. Contributions to the Disaster Response Fund generate Foundation recognition points and count toward these recognition levels: Paul Harris Fellow, Paul Harris Society, Major Donor, and Arch Klumph Society. The Disaster Response Fund is separate from the

Annual Fund, and therefore contributions are not credited toward a club's Annual Fund goals, are not applied for SHARE calculations, and do not help donors attain annual status as a Rotary Foundation Sustaining Member or for Every Rotarian, Every Year.

ENDOWMENT

Rotary's Endowment ensures that future Rotary members will have the financial resources they need to design and implement sustainable projects year after year. Contributions to Rotary's Endowment are invested and professionally managed to provide funding to support Rotary members' local and global philanthropic work. Each year, the Trustees determine spending, which is directed to Foundation programs including SHARE, the World Fund, the Rotary Peace Centers, and the areas of focus. Gifts to the Endowment support the same programs that the Annual Fund supports, but in perpetuity.

Support for the Endowment may be through an outright gift, a planned gift as part of an estate, or a combination of both.

WAYS TO GIVE

Making a contribution

Contributions to The Rotary Foundation can be made by credit card at rotary.org/donate. They can also be made by check or wire transfer, or through a club, using The Rotary Foundation Contribution Form. Club officers who sign in to My Rotary can make online gifts for their club or its members. Refer to pages 32-33 for regional office contact information.

Information about gifts of stocks, bonds, and mutual funds is available at rotary.org/securities.

Please consult regional offices for more information on ways to give that may be specific to a country or region.

With all gifts, be sure to include the member ID to ensure that we award proper credit and recognition.

Recurring giving (Rotary Direct)

Support The Rotary Foundation year-round by automatically giving each month, quarter, or year with Rotary Direct. Donors can enroll online at my.rotary.org/rotary-direct, write to rotarysupportcenter@rotary.org, call the Rotary Support Center at +1-866-976-8279, or contact a regional office.

Donors can change or cancel their recurring giving anytime by signing in to My Rotary and selecting **My Account** and then **My Donations**. Then, they can review and edit any active recurring donations.

Submitting contributions for club members

The Every Rotarian, Every Year initiative encourages Rotary members to support the Foundation by making personal contributions to the Annual Fund. To simplify the process for members, many club leaders use The Rotary Foundation Multiple Donor Form to send the contributions of many people together while having each person credited separately. Submitting contributions this way also generates individual tax receipts where applicable. The person who completes the multiple donor form affirms that the donors did not receive anything in exchange for their contributions and that they are eligible to receive a charitable tax benefit where applicable.

Here are some other suggestions for submitting contributions:

- Double-check the donor names and amounts.
- Acknowledge the contribution, and include the specific amount donated. Make sure that donors know what they have contributed and that they will be receiving a tax receipt (where applicable).
- Provide Rotary identification numbers so people are properly credited for their gifts. For help obtaining this information, write to rotarysupportcenter@rotary.org.
- A charitable contribution is a personal decision with tax implications, and the decision cannot be made without a donor's knowledge or involvement. Please do not use the multiple donor form for a surprise gift, or to thank or honor someone. Instead, refer to the section below on memorial and tribute gifts.
- In some countries, such as the United States, tax codes do not permit charitable deductions for donors if they receive a benefit related to their contribution. U.S. donors should consult the Internal Revenue Service's latest Publication 526 for more information.
- Proceeds from raffles or games of chance are best submitted to The Rotary Foundation as club contributions, without assigning credit to individual members. Assigning credit to the club or district minimizes the chance that tax receipts will be issued to individuals in error.

Memorial and tribute gifts

To honor or memorialize someone with a contribution to The Rotary Foundation, go to rotary.org/donate. Select **Donate**, choose what program to support, and then select, "I would like to make this donation in honor or in memory of someone."

Donors will receive recognition credit and a tax receipt (where applicable). The person they honor or a family member (in the case of a memorial) will be notified of the gift by email if the person or family member's email address is entered accurately by the donor when the contribution is made. Honorees and family members can also be notified with a print-at-home document.

For tax reasons, do not send funds to the Foundation in the name of anyone who did not actually provide the funds. People identified as donors could receive tax receipts without having made a contribution, which may put them and The Rotary Foundation at legal risk.

Please review the sections about Paul Harris Fellows and Foundation recognition points to learn more about offering Foundation recognition to others.

For more information, write to memorials@rotary.org.

Employee matching gifts

Double the impact of a gift by asking employers to match contributions to The Rotary Foundation. More than 15,000 companies, including many international corporations, match gifts to the Foundation. Find employers at rotary.org/matchinggifts. Contact the human resources department to learn whether a company is eligible for the program.

Please send the company's matching gift form directly to the Foundation:

By email (preferred): annualfund@rotary.org

Or mail the form to:
The Rotary Foundation of Rotary International
Attn: Corporate Matching Gifts
1560 Sherman Avenue
Evanston, IL 60201-3698 USA

Employers receive gift credit and a tax receipt (where applicable) when they contribute. Learn more about Rotary's employee matching gift program.

Fundraising for The Rotary Foundation on Raise for Rotary

Raise for Rotary is a platform that allows individuals and teams to create online fundraisers that benefit The Rotary Foundation. These fundraisers are a great way to celebrate personal events and special occasions. Organizers can share their fundraisers through social media, email, and texts so that family members, friends, colleagues, and supporters can donate online. Raise for Rotary is available in English and accepts fundraising goals and donations in U.S. dollars (worldwide), Australian dollars, Brazilian reais, British pounds, Canadian dollars, Danish kroner, euros, Japanese yen, Norwegian kroner, South African rand, Swedish kronor, and Swiss francs. More currencies and language options will be added in the future.

Fundraising for The Rotary Foundation on Facebook

Raise funds for The Rotary Foundation using Facebook. Simply select End Polio Now as the nonprofit, and share it with friends. Funds received through the End Polio Now page will support polio eradication.

Donations made through Facebook, as with other non-Rotary platforms, are combined and do not provide credit to individual members. To have contributions recorded individually, donate to The Rotary Foundation directly.

FOUNDATION FUNDING RESOURCES

Club and district resources

- Rotary Club Central: Online tool to help clubs set goals and track their progress throughout the year; allows club officers to select the goals that are most relevant to their clubs, focusing on membership, giving, service projects, young leaders, public image, and the Club Excellence Award
- The Rotary Foundation Multiple Donor Form: A form that makes it easier for club officers to submit one large sum and list contributions from different members individually
- DDF Best Practices brochure: Overview of what a district should consider in planning how to maximize DDF use and implementing that plan

Raising awareness

- Rotary Foundation Basics: Online course with shareable presentations that explain how The Rotary Foundation works

- District Guide to Growing the Endowment: Materials to effectively promote the Endowment as an important funding source
- Giving & Grants: Quarterly newsletter with information about fundraising and grants

Individual giving

- Every Rotarian, Every Year brochure: For distribution to every club member; explains the need for members to participate in and contribute to Rotary Foundation grants and activities
- Rotary's Endowment: Website introducing the Endowment, structuring a legacy, and recognition opportunities, with a link to notify us of commitments
- Planned Giving: Website of information about planning a gift to Rotary through an estate or financial plan with U.S. tax benefits
- Your Legacy, Rotary's Promise brochure: Detailed information about the Endowment and building a legacy at the $25,000 level or higher, with inspiring donor profiles
- Your Rotary Legacy commitment notification card: An overview of the Endowment, legacy recognition, and naming opportunities; includes a response card that is required for recognition

FOUNDATION RECOGNITION

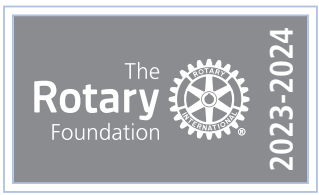
The Rotary Foundation offers numerous opportunities for people who support our grants and programs to receive recognition and appreciation.

Access a custom Donor History Report, which includes a personal contribution history and recognition summary, in My Rotary. Request this report by writing to rotarysupportcenter@rotary.org.

INDIVIDUAL RECOGNITION

Rotary leaders can use My Rotary or Rotary Club Central to review individual and club giving.

Rotary Foundation Sustaining Member



A Rotary Foundation Sustaining Member personally contributes $100 or more each Rotary year to the Annual Fund. These contributions count toward Paul Harris Fellow, multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition banners. Use Rotary Foundation Sustaining Member stickers to recognize these donors.

Use the Club Foundation Banner Report to identify a club's Rotary Foundation Sustaining Members.

Paul Harris Fellow


THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL

is hereby named a

PAUL HARRIS FELLOW

in appreciation of tangible and significant assistance given for the furtherance of better understanding and friendly relations among peoples of the world.

The Rotary Foundation

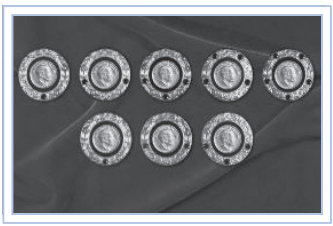
Paul Harris Fellow recognition is given to anyone who contributes $1,000 or more cumulatively to the Annual Fund, the PolioPlus Fund, the Disaster Response Fund, or an approved global grant (or who receives the equivalent in Foundation recognition points). Recognition consists of a certificate and pin. Use the Club Recognition Summary to find a club's Paul Harris Fellows.

Certificate of Appreciation



Certificate of Appreciation recognition is given to honor a business or organization. Because Paul Harris Fellow recognition is only for individuals, a donor may use Foundation recognition points to award a business or organization a certificate of appreciation.

Multiple Paul Harris Fellow



Multiple Paul Harris Fellow recognition is given at subsequent $1,000 levels. Recognition consists of a pin set with additional stones corresponding to the recipient's recognition amount.

Level	Range*	Pin
+1	$2,000 to $2,999	One sapphire
+2	$3,000 to $3,999	Two sapphires
+3	$4,000 to $4,999	Three sapphires
+4	$5,000 to $5,999	Four sapphires
+5	$6,000 to $6,999	Five sapphires
+6	$7,000 to $7,999	One ruby
+7	$8,000 to $8,999	Two rubies
+8	$9,000 to $9,999	Three rubies

*Range can include a combination of cash contributions and Foundation recognition points.

Paul Harris Society



The Paul Harris Society recognizes individuals who notify us of their intent to contribute $1,000 or more each Rotary year to any combination of Annual Fund-SHARE, Annual Fund-World Fund, Annual Fund-Areas of Focus, the PolioPlus Fund, the Disaster Response Fund, or approved global grants. Recognition consists of a chevron-style pin and certificate provided by a district Paul Harris Society coordinator.

Paul Harris Society members are listed in the Paul Harris Society Report.

Major Donor

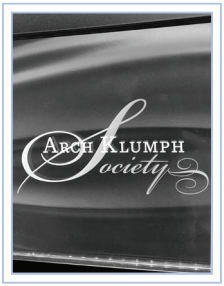




Major Donors are individuals or couples whose combined giving has reached $10,000, regardless of the gift designation. This recognition level can be achieved only through personal contributions and not through recognition points. Major Donors may choose to receive a crystal recognition piece and pin(s) or pendant(s) commemorating the gift at each new recognition level. Major Donors are listed in the Major Donor, Arch Klumph Society, and Bequest Society Report.

Level	Range
1	$10,000 to $24,999
2	$25,000 to $49,999
3	$50,000 to $99,999
4	$100,000 to $249,999

Arch Klumph Society



The Arch Klumph Society recognizes individuals or couples whose giving has reached $250,000, regardless of gift designation. This recognition level can be achieved only through personal contributions and not through recognition points. Biographies, portraits, and ceremony videos of Arch Klumph Society members are featured in the Arch Klumph Gallery on the 17th floor of Rotary International World Headquarters and in Arch Klumph Society kiosks at several regional offices. Members also receive lapel pins and pendants, as well as invitations to the society's exclusive events, held worldwide. Special induction and elevation ceremonies are offered to members. Arch Klumph Society members are listed in the Major Donor, Arch Klumph Society, and Bequest Society Report.

Trustees Circle — $250,000 to $499,999
Chair's Circle — $500,000 to $999,999
Foundation Circle — $1 million to $2,499,999
Platinum Trustees Circle — $2.5 million to $4,999,999
Platinum Chair's Circle — $5 million to $9,999,999
Platinum Foundation Circle — $10 million and above

Benefactor


THE ENDOWMENT FUND OF
The Rotary Foundation of Rotary International
First Last Name
is hereby named
Benefactor
The Trustees of The Rotary Foundation and all the people who benefit from the Foundation's educational and charitable programs appreciate your unselfish commitment and generous support.
The Rotary Foundation

A Benefactor is an individual who notifies The Rotary Foundation of a commitment for future gifts to the Endowment of $1,000 or more or who makes an outright gift of $1,000 or more to the Endowment. Benefactors receive a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin. They are listed in the Benefactor Report and are identified in the Club Recognition Summary.

Bequest Society



Individuals or couples who notify The Rotary Foundation of their commitment to include future gifts of $10,000 or more to the Foundation in their estate plans are invited to join the Bequest Society. Each level of giving includes the benefits of the preceding levels:

$10,000
A Bequest Society pin and an exclusive art piece suitable for framing

$25,000
A Rotary's Promise crystal and a named endowed fund



$50,000
Separate named endowed funds

$100,000
A customized Rotary's Promise crystal

$250,000
Posthumous Arch Klumph Society recognition

$500,000
Special seating and registration benefits at the Rotary International Convention

Legacy Society

Individuals or couples who document future gifts to the Endowment of $1 million or more are invited to join the Legacy Society. These donors are listed in Rotary's annual report and are invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special tokens of appreciation and all the benefits provided to Bequest Society members.



CLUB RECOGNITION

The Rotary Foundation offers clubs several opportunities to earn recognition for their support of its grants and programs.

The Club Foundation Banner Report displays a club's progress in the current Rotary year toward becoming a 100% Foundation Giving Club and an Every Rotarian, Every Year Club, as well as toward qualifying for the district's Top Three Per Capita in Annual Fund Giving banner recognition.

New club members (those who joined or transferred from another club during the current Rotary year) aren't included in participation requirements for club banners (except for the 100% Paul Harris Fellow Club banner). However, new members' contributions will be used for per capita calculations.

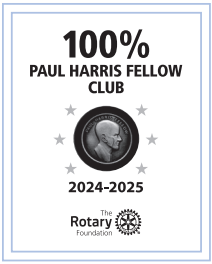
Banner recipients listed in the Club Foundation Banner Report (available to club and district Foundation leaders in My Rotary or Rotary Club Central) may fluctuate throughout the Rotary year because of changes in membership and additional or redistributed contributions. Leaders can use the report to determine whether a club will qualify for the annual recognition banners listed below. Final banner certification is processed by The Rotary Foundation after the Rotary year ends on 30 June. Club banners earned for the previous year are shipped to the current district governor in October or November. Request the District Foundation Banner Report by writing to rotarysupportcenter@rotary.org.

100% Foundation Giving Club



This banner is awarded to clubs that achieve an average of $100 in per capita giving and 100% participation, with every dues-paying member contributing at least $25 to any or all of the following during the Rotary year: the Annual Fund, the PolioPlus Fund, approved global grants, or the Endowment Fund.

100% Paul Harris Fellow Club



For a club to be eligible, every dues-paying member needs to be a Paul Harris Fellow at the time the district governor requests banner recognition. This recognition is a one-time award, but the intent is that the club will maintain its membership at the 100% Paul Harris Fellow level.

To obtain this recognition:

1. A club representative contacts the district governor after determining that all current dues-paying club members are Paul Harris Fellows.
2. The district governor confirms that all members are Paul Harris Fellows by using the Club Recognition Summary report and then notifies The Rotary Foundation by writing to rotarysupportcenter@rotary.org.

The top of the Club Recognition Summary indicates whether the club received the 100% Paul Harris Fellow Club banner, along with the date this was achieved.

Every Rotarian, Every Year Club



For this recognition, Rotary clubs need to achieve a minimum Annual Fund contribution of $100 per capita during the Rotary year, and every dues-paying member needs to personally contribute at least $25 to the Annual Fund during the year.

Rotary's Promise Club

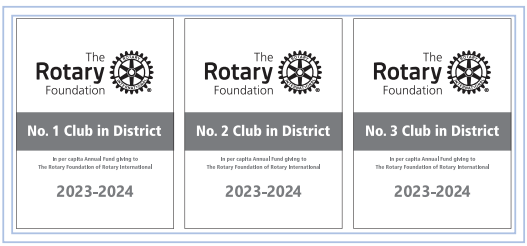
Rotary clubs with 100% of members supporting the Endowment are eligible to request a Rotary's Promise Club electronic certificate and digital insignia. Outright gifts or commitments for future estate gifts designated to the Endowment Fund of $1,000 or more qualify. To obtain this recognition:

1. A club representative contacts the district governor after determining that all current dues-paying club members are Benefactors or have a higher recognition level.
2. The district governor confirms that all members are at minimum Benefactors by using the Club Recognition Summary report and then notifies The Rotary Foundation by writing to planned.giving@rotary.org for confirmation of the club's qualification.

The top of the Club Recognition Summary indicates whether the club received the Rotary's Promise Club recognition, along with the date this was achieved.

Top Three Per Capita in Annual Fund Giving

Banners are given to the three clubs in each district that give the most per capita to the Annual Fund. To be eligible, clubs need to achieve a minimum of $50 in per capita annual giving.



100% Paul Harris Society Club

This recognition is awarded to clubs in which every dues-paying member has contributed a minimum of $1,000 to the Annual Fund, the PolioPlus Fund, or an approved global grant during the Rotary year.



End Polio Now: Countdown to History Campaign Certificate of Appreciation

This certificate is awarded to clubs that annually contribute $1,500 or more to Rotary's PolioPlus Fund.

Rotaract Giving Certificate

This certificate is awarded annually to Rotaract clubs that contribute a total of at least $100 during the Rotary year. Each donor needs to be registered as a member of the Rotaract club. Gifts from the club or its members can be to any fund and in any amounts totaling $100.

FOUNDATION RECOGNITION POINTS

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, the PolioPlus Fund, the Disaster Response Fund, or an approved global grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Contributions to the Endowment are not eligible.

Donors can extend Foundation recognition points to other individuals to help them become, or to name them as, Paul Harris Fellows or multiple Paul Harris Fellows. Foundation recognition points belong to the original donor until the donor uses the points or until the donor's death, at which time they expire (unless the donor is a Major Donor, in which case the points may be used by a surviving spouse or partner).

Note that Foundation recognition points do not count toward Paul Harris Society or Major Donor recognition.

Transfer rules

Members who want to transfer their Foundation recognition points need to do so in increments of at least 100 points. They also need to provide an authorizing signature on the Paul Harris Fellow Recognition Transfer Request Form.

Note that Foundation recognition points cannot be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow to receive recognition points.

FOUNDATION RECOGNITION RESOURCES

- Every Rotarian, Every Year brochure: Information about EREY and the Annual Fund-SHARE
- Rotary Foundation Sustaining Member stickers: Badge stickers to celebrate Rotary members who have contributed $100 or more to the Annual Fund; available for order by club or district officers
- Paul Harris Society brochure: Information about Paul Harris Society recognition
- Rotary Giving Works brochure: Information about major gifts
- Your Rotary Legacy commitment notification card: Information about the Endowment, legacy recognition, and naming opportunities; includes a response card that is required for recognition
- Arch Klumph Society brochure: Information about the Arch Klumph Society
- Rotary's Promise Club Program Guide: Information about how to qualify as a Rotary's Promise Club
- Understanding Foundation Recognition Points: Fact sheet that answers common questions about the system
- Useful recognition reports in My Rotary and Rotary Club Central:
  Major Donor, Arch Klumph Society, and Bequest Society Report
  Paul Harris Fellow and Benefactor Report
  Club Foundation Banner Report
  District Foundation Banner Report
  Club Recognition Summary

GENERAL RESOURCES

MY ROTARY

The member website, My Rotary, includes tools and applications to conduct Rotary business. They're now found under Club & District Administration. Sign in to:

- Monitor club membership initiatives, service activities, and Foundation giving goals through Rotary Club Central
- Donate to The Rotary Foundation
- Learn more about Rotary Foundation activities
- Apply for grants in the Grant Center
- Take Foundation courses in the Learning Center
- Review Donor History Reports, which include a contribution history and recognition summary
- Share your project impact and inspire others on Rotary Showcase

Reports

Rotary leaders can access the following reports through My Rotary, Rotary Club Central, or Rotary's Support Center.

Remember that Foundation giving reports should be used for authorized Rotary purposes only. Users agree to abide by Rotary's Personal Data Use Policy, which prioritizes protecting individual privacy and personal information. We strongly encourage leaders who have access to reports to read the policy and take the Protecting Personal Data course in the Learning Center.

Giving reports

The following reports are available to Rotary leaders.

Report	Content	Type
Donor History Report	Provides a comprehensive list of transactions (contributions, transfers of Foundation recognition points, commitments, and recognition); use to reconcile any contribution/recognition issues	Individual
Club Foundation Banner Report	Provides eligibility dates achieved for EREY Club and 100% Foundation Giving Club banners for the current Rotary year	Club, district
Club Fundraising Analysis	Provides a five-year dashboard of Annual Fund goals, giving, and recognition totals; use to set goals	Club, district
Club Recognition Summary	Provides members' Paul Harris Fellow levels, contribution amounts, Foundation recognition points available, Rotary Direct participation, Rotary's Promise Club progress, Benefactor status, and last contribution date with gift designation; indicates 100% Paul Harris Fellow Club achievement and date, along with the clubs' all-time Foundation giving; use to identify noncontributing clubs	Club, district
Major Donor, Arch Klumph Society, and Bequest Society Report	Lists Bequest Society and Legacy Society members, Major Donors, and Arch Klumph Society members, all with their recognition dates; includes mailing addresses	Club, district
Monthly Contribution Report	Provides contribution information by club to the Annual Fund, the Endowment, and other funds for a selected Rotary year and month, including year-to-date contribution information	Club, district
Paul Harris Fellow and Benefactor Report	Provides lists of Benefactors, Paul Harris Fellows, multiple Paul Harris Fellows, and Certificate of Appreciation recipients; includes recognition dates and mailing addresses	Club, district
Paul Harris Society Report	Provides Paul Harris Society membership and a four-year history of eligibility; includes tab with donor contact information	Club, district

Report	Content	Type
PolioPlus Report	Provides contribution information by club to PolioPlus for a selected Rotary year and month, including year-to-date and prior-year contribution information	Club, district
SHARE Contribution Detail	Shows each club's Annual Fund-SHARE contributions, which determine the amount of DDF for a specific Rotary year	Club, district
Available DDF by District Report	Shows all DDF activity (transfers, grant funding, returned funds, pending allocations) and the estimated available balance as of the previous business day	District
Current Club Officer Giving Report	Provides a districtwide list of current club officers, indicating whether they contributed to The Rotary Foundation in the current or prior Rotary year	District
District Foundation Banner Report	Shows progress toward club banner recognition (Top Three Per Capita in Annual Giving, 100% Foundation Giving Club, EREY Club) for a Rotary year; lists the percentage of participation by club members for Foundation giving and EREY recognition	District
District Fundraising Analysis	Provides a five-year listing of district giving to The Rotary Foundation; lists cumulative number of Paul Harris Society members and those eligible, Major Donors, major gifts, Benefactors, and Bequest Society members; lists number of Foundation recognition points and total endowed funds with their market value	District
Endowed Fund Update	Shows available DDF from the spendable amount of Endowment Fund-SHARE contributions	District
Incoming Club Officer Giving Report	Provides a districtwide list of next year's club officers, indicating whether they contributed to The Rotary Foundation in the current or prior Rotary year	District
Program Participants and Alumni by District	Provides a list of current and past program participants associated with a particular district	District

Report	Content	Type
Tracked Gifts Report	Shows the amount available to a district to use on global grants from directed gifts and endowments	District

Grant reports

The following reports are available to all Rotary members.

Report	Content
Grant Detail Report	Comprehensive details about one grant
Grant Location Report	All approved global grants taking place in a selected country
Grant Participation Report	Club, district, and zone participation in global grants and district grants
Grant Productivity Report	Global grants and district grants in all statuses for a selected club, district, or zone
Grants by Sponsor Report	Grants by a specified club or district and their current status (not including closed and canceled grants)
Cadre Member Information Report	Information about members of The Rotary Foundation's Cadre of Technical Advisers

WHERE TO DIRECT QUESTIONS

Call +1-866-976-8279 or write to rotarysupportcenter@rotary.org for details about contributions and recognition points, to find information about grants, and to ask questions.

DISTRICT AND ZONE RESOURCES

District Rotary Foundation chairs (DRFCs) promote Foundation activities and fundraising in their districts, serve as the primary contacts for district grants, and provide support to club Foundation committees. DRFCs review and authorize all applications for global grants sponsored by their districts and member clubs. DRFCs also assist their district governors with authorizing the use of District Designated Funds, nominating qualified recipients for district Rotary Foundation awards, and obtaining input from members before establishing district Foundation goals.

Regional Rotary Foundation coordinators (RRFCs) promote Foundation activities and fundraising in their zone or area. RRFCs train their team of assistant regional Rotary Foundation coordinators and district leaders in setting and achieving fundraising and program goals.

Endowment/major gifts advisers (E/MGAs) work closely with regional and district leaders to develop personalized plans for identifying and cultivating potential donors and soliciting major gifts. They also help facilitate events that engage current Foundation supporters and develop prospective donors.

My Rotary provides a list of current regional leaders, consisting of RRFCs, End Polio Now coordinators (EPNCs), endowment/major gifts advisers, and others.

CONTRIBUTIONS BY REGION

Associate foundations exist in several countries to provide a tax benefit for contributions to The Rotary Foundation. Please contact the Rotary International office in your region for more information.

Brazil

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