



The Rotary Foundation
of Rotary International

Quick Reference Guide

2000-01

Humanitarian
Programs

Foundation
Funding

Educational
Programs

Resource
Materials

This quick reference has been designed to provide Rotarians at the club level with basic information about how they can participate in Rotary Foundation programs and how they can support The Rotary Foundation financially. More information is available on the Rotary Web site: *www.rotary.org*.

All application forms are available on the Web site except where otherwise indicated. Forms with a catalog number and all resources and materials may be ordered from RI's Publications Order Services Section (telephone: 847-866-4600; fax: 847-866-3276) or RI service centers.

Notes and abbreviations:

Cost references are provided in U.S. dollars.

TRF (The Rotary Foundation)

DDF (District Designated Fund — also known as *SHARE* funds)

HUMANITARIAN PROGRAMS

POLIOPLUS AND POLIOPLUS PARTNERS GRANTS

- Purpose** Support global polio eradication efforts in polio-endemic countries including national immunization days and monitoring of polio virus transmission.
- Funding** PolioPlus grants are funded by the general PolioPlus Fund. PolioPlus Partners projects are funded by cash and *SHARE* contributions. Partners cash contributions are matched if funds are available.
- Application** Projects must be submitted by National PolioPlus chairpersons (listed in the *Official Directory*) or a major partner agency (such as the World Health Organization and UNICEF).
- Decision**
- Trustees approve PolioPlus grants at regularly scheduled meetings.
 - PolioPlus Partners grants are approved on a rolling basis.

Staff Contact Information

E-mail questions to polioplus@rotaryintl.org or telephone (847) 866-3345.

HEALTH, HUNGER AND HUMANITY (3-H) GRANTS

- Purpose** Fund long-term (2-5 years) international development projects to improve health, alleviate hunger, or enhance development through self-help activities.
- Funding**
- | | |
|-------------------------------|----------------------|
| Amount provided by TRF: | \$100,000-\$300,000 |
| Amount required from sponsor: | 10% (up to \$25,000) |
- Application**
- Step 1: Submit preliminary proposal letter to TRF.
 - Step 1-a: (Optional) Apply for a 3-H Planning Grant (6 months to 1 year in duration). Contact Foundation staff for further information.
 - Step 2: Submit a *3-H Grant Application* to TRF.
- Deadlines**
- | | |
|---------------------------------|--------------------------|
| • Step 1: Preliminary Proposal: | 1 January or 1 July |
| • Step 2: 3-H Application: | 15 March or 15 September |
- Criteria for Success** Project must benefit a large number of people; be of a self-help nature; involve a significant number of Rotarians in at least two countries; be clearly identified as Rotary-supported; be initiated, controlled, and implemented by Rotarians; and be self-sustaining after grant funding has ended.
- Decision** Trustees review applications: October/November and March/April
- Cannot be used for** Purchase of land or substantial buildings (existing or construction) and payment of operations or administrative expenses for another organization, seminars, conferences, or international exchanges.

3-H PLANNING GRANTS

Purpose	Fund advance planning for 3-H projects of significant size and impact.
Funding	Club/District — out of World Fund — up to \$20,000 — no time restriction
Application	Preliminary proposal by letter; <i>3-H Planning Grant Application</i>
Deadlines	<ul style="list-style-type: none">• Proposal: 15 February or 15 August• Application: 1 May or 1 November
Decision	30 June or 31 December

MATCHING GRANTS

Purpose	Assist international humanitarian service projects in cooperation with Rotarians in another district.
Funding	<ul style="list-style-type: none">• TRF provides a 1:1 match of sponsor donations up to \$50,000.• Sponsors must provide at least half of the project cost.• Contributions can be made by utilizing district <i>SHARE</i> funds.
Application	Submit a <i>Matching Grant Application</i> (141-EN) to TRF.
Deadlines	<ul style="list-style-type: none">• Applications seeking a match of less than \$25,000 can be submitted between 15 July and 31 March.• Competitive applications seeking more than \$25,000 must be submitted by 1 August or 1 January.
Criteria for Success	Projects must be new (not already in progress) and feature the active, personal participation of Rotarians in both the sponsor and project site countries.
Decision	<ul style="list-style-type: none">• Grants for <\$25,000 are approved on a rolling basis from 1 August through 15 May.• Grants for >\$25,000 are reviewed at the October/November or March/April meetings of the Trustees.
Cannot be used for	Purchase of land or substantial buildings (existing or construction) and payment of salaries, operations or administrative expenses for another organization, seminars, conferences, or international exchanges.

HELPING GRANTS

Purpose	Support humanitarian projects in non-Rotary countries or where significant participation of local Rotarians is limited.
Funding	<ul style="list-style-type: none">• TRF matches 50% of sponsor contributions up to \$15,000.• Sponsors must provide at least two-thirds of the project cost.• Contributions can be made by utilizing district <i>SHARE</i> funds.

Application	Submit a <i>Helping Grant Application</i> (150-EN) to TRF.
Deadlines	Applications can be submitted between 15 July and 31 March.
Criteria for Success	Projects must be initiated, sponsored, and monitored by the sponsor club/district outside the project site country.
Decision	Grants are approved on a rolling basis from 1 August through 15 May.
Cannot be used for	See “Cannot be used for” in Matching Grants (page 2).

NEW OPPORTUNITIES GRANTS

Purpose	Support international humanitarian service projects which advance Rotary ideals but do not meet the eligibility criteria of existing Rotary Foundation programs.
Funding	Through DDF up to \$10,000
Application	Submit a <i>New Opportunities Grant Application</i> (128-EN) to TRF.
Criteria for Success	The project must benefit a country other than the sponsor's and must include significant Rotarian involvement. The district must have allocated DDF to the Humanitarian Category of the <i>SHARE</i> system in an amount at least equal to the grant amount requested.
Decision	Grants are approved on a rolling basis.
Cannot be used for	Purchase of land or substantial buildings (existing or construction) and payment of administrative costs.

COMMUNITY ASSISTANCE PROGRAM GRANTS — *SHARE*-FUNDED

Purpose	Support projects that increase involvement or strengthen relationships in the sponsor's community or country.
Funding	Districts can use DDF from the Humanitarian Programs allocation. Allocations range between \$1,000 and \$10,000 based on the percentage of the district's Annual Giving.
Application	Submit a <i>Community Assistance Program Application</i> (116-EN) to TRF.
Criteria for success	Projects must be new (not already in progress); feature the active, personal participation of Rotarians; and be publicly identified as being Rotary-supported.
Decision	Grants are decided on a rolling basis from 15 September to 31 May.
Cannot be used for	Purchase of land or substantial buildings (existing or new construction) and payment of salaries, operations or administrative expenses for another organization, or travel expenses.

DISCOVERY GRANTS

Purpose	Provide travel and related expenses for Rotarians or teams including at least one Rotarian to carry out the planning for future international service projects.
Funding	<ul style="list-style-type: none">• Carl P. Miller endowment (competitive): up to \$3,000• DDF: up to \$5,000
Application	Submit a <i>Discovery Grant Application</i> (198-EN) to TRF.
Deadlines	<ul style="list-style-type: none">• Carl P. Miller Grants: 1 October and 1 April• DDF-funded grant applications are accepted on a rolling basis.
Criteria for Success	Must involve at least two countries and support the mission of TRF. Prior communication between clubs/districts in the two countries must have taken place.
Decision	<ul style="list-style-type: none">• Carl P. Miller Grants: 15 August and 15 February• DDF-funded grants are approved on a rolling basis.
Cannot be used for	Travel to conferences, establishing a sister club/district relationship, or fundraising.

GRANTS FOR ROTARY VOLUNTEERS

Purpose	Subsidize volunteer service when it might not be otherwise financially feasible.
Funding	TRF funds the travel (lowest economy-class round-trip airfare) and up to \$50 per day for 4-8 weeks of service on a Rotary-approved project.
Application	Submit a <i>Grants for Rotary Volunteers Application for Volunteer Service</i> form to TRF (available from Foundation staff).
Deadline	Applications must be submitted at least 6 weeks prior to the beginning of the volunteer service term.
Decision	Grants are decided on a rolling basis within 6 weeks of application.

DISASTER RELIEF GRANTS

Purpose	Provide relief assistance for disasters such as earthquakes, hurricanes, floods, volcanic eruptions, and wildfires.
Funding	Projects are funded through DDF up to \$10,000.
Application	<ul style="list-style-type: none">• The governor of the affected district must submit a request for assistance to Rotary International. RI issues a Notice of Disaster giving a description of the crisis and information on how to meet resulting needs.

- The DDF allocation must be authorized in writing by the district governor of the donating district and sent to the *SHARE* coordinator.

Decision Grant funds are released upon confirmation that the sponsor district has funds available in its DDF to fulfill its contribution.

HUMANITARIAN TRANSPORTATION GRANTS

Purpose	Provide funds to cover the costs of transporting donated humanitarian supplies and equipment.
Funding	<i>SHARE</i> funds donated by districts to a special pool of funds support applications for this program.
Application	Submit club and district <i>Humanitarian Transportation Grant Applications</i> (117-EN) to TRF.
Criteria for Success	To transport goods donated free of charge; estimated cost of the goods must be at least 10% greater than transportation costs.
Decision	Grants are approved on a rolling basis depending upon available funds in the special pool.

ROTARY PEACE PROGRAM GRANTS

Purpose	Support events of broad human concern, involving international cooperation, and oriented toward positive suggestions for personal (or club or district) action, including at least 50% discussion.
Funding	TRF grant provides up to \$25,000. Projects may be supported by <i>SHARE</i> funds.
Application	Clubs or districts must submit a <i>Rotary Peace Programs Grant Application</i> (available from TRF staff) through the RI Director or Foundation Trustee from their region.
Deadline	Applications must be submitted by 1 February or 1 August of the year preceding the Rotary year in which the event takes place.
Criteria for Success	Applications should include the purpose, theme, and nature of the event, together with its proposed budget, time, and place.
Decision	Grant applications are reviewed at the October/November and March/April Trustees' meetings.

Staff Contact Information

Humanitarian Grants

E-mail questions to grantsm@rotaryintl.org or telephone (847) 866-3334.

HUMANITARIAN PROGRAMS RESOURCE MATERIALS

PolioPlus: A Gift to the Children of the World (317-EN). A new 11-minute video that examines Rotary's involvement in eradicating polio worldwide, shows how all Rotarians can be involved, and provides an update on the changing battle against polio and the importance of continued Rotarian involvement.

PolioPlus Video Feature Report "Polio: The Final Chapter" (328-EN). This 10-minute feature report is a membership tool for presentations at Rotary and non-Rotary venues. The video spotlights Rotary's worldwide commitment to polio eradication as well as the effort's unique volunteer element.

Humanitarian Grants Programs (130-EN). Booklet containing comprehensive information on all of The Rotary Foundation's Humanitarian Grants Programs.

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

A Guide to Applying for Rotary Foundation Grants (125-EN). Information on the Matching Grants and 3-H Grants application processes.

A Guide to Developing and Managing International Service Projects (126-EN). Steps Rotary clubs can follow using tools of Rotary International and The Rotary Foundation.

EDUCATIONAL PROGRAMS

AMBASSADORIAL SCHOLARSHIPS

Purpose	Provide scholarships to students who serve as ambassadors of goodwill to improve international understanding.
Funding	<p><i>SHARE</i> system option cost for that program year, currently:</p> <p><i>Academic-Year Scholarships</i> for one academic year of studies abroad — maximum \$23,000 including transportation, fees, room and board, and contingency funds;</p> <p><i>Multi-Year Scholarships</i> for two years of degree-oriented studies abroad — \$11,000 a year flat grant;</p> <p><i>Cultural Scholarships</i> for three to six months of intensive language training and cultural immersion abroad while living with a homestay family — includes transportation — \$10,000 and \$17,000 respectively.</p> <p><i>Vocational Training Scholarships</i> for students from low-income countries, to conduct hands-on practical training abroad for three to six months — \$10,000 and \$15,000 respectively (funded through the World Fund).</p>
Application	Districts submit an <i>Ambassadorial Scholarships Application</i> (139-EN).
Deadlines	Applications from districts due at TRF 1 October. Check with district Scholarships chairperson for district deadline.
Criteria for Success	Applicants must have completed two years of college or university coursework. See Web site for complete criteria.
Decision	Trustee-approved applicants receive confirmation 15 December.
Cannot be used for	Rotarians; Honorary Rotarians; employees of a club, district, or other Rotary entity, including Rotary International; spouses, lineal descendants (child or grandchild by blood or legal adoption), ancestors (parent or grandparent by blood) of any living person in the foregoing categories; or spouses of lineal descendants.

Staff Contact Information

Ambassadorial Scholarships

E-mail questions to scholarshipinquiries@rotaryintl.org or telephone (847) 866-4459.

ROTARY GRANTS FOR UNIVERSITY TEACHERS

Purpose	Provide grants to Rotarians and non-Rotarians to strengthen higher education in low-income countries while building international understanding and friendship.
Funding	<i>SHARE</i> DDF: \$10,000 for 3-5 months OR \$20,000 for 6-10 months of service
Application	Districts submit a <i>Rotary Grants for University Teachers Application</i> (193-EN).
Deadlines	Applications from districts due at TRF 1 October. Check with district Scholarships chairperson for district deadline.
Criteria for Success	Applicant must hold (or have held, if retired) a college or university appointment for 3 or more years — no specific rank. Applicant's home and prospective host countries must have at least one Rotary club. Applicant must teach an academic field useful to the host country and demonstrate proficiency in the language of the host country. See Web site for complete criteria.
Decision	15 December for teaching assignments beginning the next Rotary year.

Staff Contact Information

Rotary Grants for University Teachers

E-mail questions to scholarshipinquiries@rotaryintl.org or telephone (847) 866-4459.

ROTARY CENTERS FOR INTERNATIONAL STUDIES

Purpose	Provide Rotary World Peace Scholarships to students pursuing a 2-year master's-level degree in international relations, peace, and conflict resolution at one of seven official Rotary Centers for International Studies (program begins in 2002-03 Rotary year).
Funding	Transportation, tuition, fees, room and board, and limited expenses for the 21-month program
Applications	Districts submit a <i>Rotary World Peace Scholarship Application</i> (083-EN).
Deadlines	Districts submit applications to TRF by 1 October. Check with district Scholarships chairperson for district deadline.
Criteria for Success	Candidates should have appropriate undergraduate degree to gain entrance to the Rotary Centers master's degree programs and have significant work experience in relevant fields with a demonstrated commitment to peace and international understanding.
Decision	Trustee-approved applicants receive confirmation by 15 December.

Staff Contact Information

Rotary Centers for International Studies

E-mail questions to rotarycenters@rotaryintl.org or telephone (847) 866-3318.

GROUP STUDY EXCHANGE AWARDS (GSE)

Purpose	Enable an exchange of teams of outstanding young non-Rotarian business and professional persons between districts in different countries — several variations available (single vocation, humanitarian, neighboring country).
Funding	From the World Fund. Covers the cost of least expensive round-trip transportation for four team members and one Rotarian team leader for 4-6 weeks.
Additional Funding	<ul style="list-style-type: none">• By DDF allocation, up to two additional non-Rotarian team members — \$2,000 each.• Language training (out of World Fund) — up to \$1,000 per team (additional DDF may be applied).• For one additional team of non-Rotarians per district per year (from <i>SHARE</i> DDF) — \$11,000 (less for a neighboring country).
Applications	Districts submit <i>GSE Application</i> (167-EN), <i>GSE Team Leader Application</i> (260-EN), and <i>GSE Team Member Applications</i> (161-EN).
Deadlines	Applications from districts due at TRF 1 November. Check with district GSE chairperson for district deadline.
Criteria for Success	Non-Rotarian team members (25-40 age range) must be currently employed in any recognized business or profession on a full-time basis. Rotarian team leader should be close in age to team members. See Web site for complete criteria.
Decision	Pairing confirmation to districts 31 January
Cannot be used for	PDGs (with the exception of immediate PDGs) may serve as team leaders only if there has been an open selection process within the district. Spouses may not travel with team members or leaders.

Staff Contact Information

Group Study Exchange

E-mail questions to gseinquiries@rotaryintl.org or telephone (847) 866-3330.

ROTARY FOUNDATION ALUMNI

Rotary Foundation alumni are the more than 75,600 people who have received program awards from the Foundation since 1947. Rotary Foundation alumni include Ambassadorial Scholars, Group Study Exchange team leaders and members, Rotary Volunteers, and recipients of Rotary Grants for University Teachers and Carl P. Miller Discovery Grants. Talented, committed individuals, they know Rotary well and share its vision of furthering world understanding and peace. They are available to speak at Rotary functions or to participate in Rotary programs. Rotary Foundation alumni are an excellent resource for presenting the message of the Foundation because they provide the “human face” of Rotary programs and a sense of commitment to the world community. They may also serve as additional volunteers for club/district projects and activities and are a potential source for Rotary club membership. Finally, they are an important potential resource for financial support of The Rotary Foundation and helping clubs and districts understand the human impact of Foundation programs.

Contact your district Alumni subcommittee chairperson to identify Rotary Foundation alumni who may be available to speak at your meeting or to invite alumni to participate in club activities.

EDUCATIONAL PROGRAMS RESOURCE MATERIALS

Program Guide for Rotarians: Ambassadorial Scholarships and Rotary Grants for University Teachers (012-EN). Publication with information clubs and districts need to successfully sponsor and host Ambassadorial Scholars and University Teachers.

Ambassadorial Scholarships Program: Investing in World Peace (432-EN). A 10-minute video commemorating the 50th anniversary of The Rotary Foundation's first educational program, which can be used to promote the Ambassadorial Scholarships program at Rotary and Rotaract club meetings and on informational visits to secondary and post-secondary institutions.

Rotary Centers for International Studies (089-EN). Video covering the new educational priority of The Rotary Foundation; includes information about the unique university partnerships and degree programs and interviews with several of the Rotary Center directors. Useful for promoting the Centers and financial contributions to support the program through TRF, and for identifying Rotary World Peace Scholar candidates.

Group Study Exchange Brochure (160-EN). Four-color leaflet, suitable for display for clubs or districts. Describes the GSE program and application procedures for potential team members and Rotarians.

FOUNDATION FUNDING

ANNUAL PROGRAMS FUND CONTRIBUTIONS

- Purpose** Provide the necessary funding for operation of Rotary Foundation programs. Go to www.rotary.org for additional information, including ways to give.
- How fund works** Contributions made by individuals, clubs, and districts are invested for three years.
- After three years:
- 60% of the original contribution is returned to the district through the DDF.
 - 40% of the original contribution is provided to the World Fund to support humanitarian programs and to provide one GSE per district.
 - Investment earnings support administrative costs and may be used to benefit Foundation humanitarian and educational programs.
- Recognition** Gifts to the Annual Programs Fund count towards Paul Harris Fellow Recognition, Multiple Paul Harris Fellow Recognition, and Rotary Foundation Sustaining Member Recognition.

PERMANENT FUND GIFTS

- Purpose** Ensure the long-term viability of TRF and its programs. Earnings from the Permanent Fund, an endowed fund, enable TRF to expand existing programs and/or underwrite new humanitarian, cultural, and educational programs. Go to www.rotary.org for additional information, including ways to give.
- How fund works** Contributions made by individuals are invested in perpetuity. A percentage of the total value of the fund is spent annually to benefit the programs of TRF.
- Types**
- Testamentary gifts through a will or estate plan
 - Life income gifts (i.e., Charitable Remainder Trusts, Charitable Gift Annuities, Pooled Income Fund)
 - Outright gifts of property, cash, or investments
- Recognition** Anyone who notifies TRF that he or she has made provision in his or her will or estate plan, or who makes an outright gift of at least \$1,000 is recognized by the Trustees as a Benefactor. Those who inform the Foundation that they have made a major gift commitment (\$10,000 or more) in their final estate plan will receive Rotary Foundation Bequest Society Recognition.

CONTRIBUTION RECOGNITION

Purpose Acknowledges the financial support generously provided by individuals. Go to www.rotary.org for additional information.

Forms of contribution recognition:

Paul Harris Fellow Acknowledges contributions of \$1,000 or equivalent.

Multiple Paul Harris Fellow Acknowledges contributions of \$1,000-\$9,999.

Benefactor Acknowledges contributions of \$1,000 or equivalent to the Permanent Fund or provision in estate plan.

Major gift Acknowledges contributions of at least \$10,000 or equivalent (outright or cumulative giving to the Foundation).

Staff Contact Information

Fund Development

E-mail questions to funddevelopment@rotaryintl.org or telephone (847) 866-3277.

FUND DEVELOPMENT RESOURCE MATERIALS

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

Paul Harris Fellows: Doing Good in the World (120-EN). An 11-minute video that provides an inspirational overview of Rotary Foundation programs and testimonials by Rotarians, designed to help increase the number of Paul Harris Fellows in Rotary clubs.

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

Two Needs, Two Ways of Giving (173-EN). A brochure outlining the need for contributions to the Annual Programs Fund and the Permanent Fund.

DISTRICT ROTARY FOUNDATION RESOURCES

(Fill in the contact information for the Rotary Foundation committee representatives in your district.)

Rotary Foundation Committee chairperson	
Annual Programs Giving subcommittee chairperson	
Permanent Fund subcommittee chairperson	
Scholarships subcommittee chairperson	
GSE subcommittee chairperson	
PolioPlus subcommittee chairperson	
Grants subcommittee chairperson	
Alumni subcommittee chairperson	

RESOURCE MATERIALS

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

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

The Rotary Foundation Handbook (300-EN). An up-to-date resource covering the Foundation, its programs and finances, as well as the procedures and relationships by which local clubs and districts may participate in Foundation programs.

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

The Rotary Foundation: The International Vision of Rotary (065-EN). A 15-minute video documentary with footage from around the world that provides an inspirational overview of the Foundation's humanitarian and educational programs.



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