



# **THE ROTARY FOUNDATION (TRF)**

## **District Grants Training 2024**



# District Qualification & Stewardship

- ▶ **To Participate in TRF Grants Program:**
  - ▶ Governor, Governor-Elect, Governor Nominee, & the District Foundation Chair
  - ▶ District leaders must complete an online qualification process
  - ▶ Districts agree to follow and implement the financial and stewardship guidelines in the District Memorandum of Understanding
  - ▶ Must conduct a grants management seminar as part of the qualification process for clubs within the district

# Club Qualification & Stewardship



- ▶ To participate in grants:
  - ▶ Clubs must complete annual qualification process to be eligible to apply for grants
  - ▶ At least one member must complete a district grants management seminar
  - ▶ Sign and follow the Club Memorandum of Understanding (MOU)
    - ▶ Club President & President-Elect

# The Rotary Foundation



- ▶ Charitable Arm of Rotary International
- ▶ 501(c)(3) non-profit corporation
- ▶ Founded in 1917
- ▶ Supported solely by voluntary contributions
- ▶ The Rotary Foundation Board of Trustees

# The Rotary Foundation



- ▶ The Rotary Foundation started with \$26.50. Grown to more than US\$1.3 billion.
- ▶ *“Doing Good in the World”*
- ▶ \$435 Million Donated in 2022-2023
- ▶ Funded 1092 Global Grants & 473 District Club Grants, & 324 Disaster Response Grants in 2022-2023

# The Rotary Foundation



- ▶ **Annual Fund-Share\***
- ▶ **Endowment\***
- ▶ **World Fund-Share\***
- ▶ **Foundation Disaster Response Fund**
- ▶ **PolioPlus**
- ▶ **Areas of Focus**
- ▶ **Approved Global Grant Projects**

# Unique Funding Model



- ▶ **Annual Fund-Share** is primary source for grant funding
- ▶ District leaders and Club members involved
  - ▶ District Governor and District Allocation Sub-Committee
  - ▶ District Grants Committee
  - ▶ Club Members

# The Rotary Foundation



- ▶ Contributions to the **Annual Fund-Share** are key to a vibrant grants program
- ▶ Every Rotarian, Every Year is the fundraising initiative designed to support Annual Fund
- ▶ Contribute at least \$100 per member annually



# **DISTRICT 7390**

## **ANNUAL FUND-SHARE**

▶ District Membership ~ 1758

**@ \$100 generates \$175,800**

**\*Not all members donate. \*Less members.**

**\*Must grow Annual Fund Share contributions.**



# Unique Funding Model

## Investment of Annual Fund-Share Dollars

- ▶ 5% is credited to Operating Expenses
  - ▶ 47.5 percent credited to World Fund
- ▶ 47.5 percent credited to District Designated Fund
  - ▶ **Invested for 3 Years**



## Annual Fund-Share

- ▶ **When Annual Fund-Share Dollars are returned to districts**
  - ▶ **District Designated Funds (DDF)**

# District Designated Funds



## Three Years Later District Designated Funds

- ▶ Up to 50% of DDF to District Club Block Grant
- ▶ 50% to Global Grants, Global Grant Scholarships, Vocational Training Teams, Transfers for PolioPlus, Transfers for Peace Centers, Transfers for Disaster Response

# Endowment Fund



- ▶ Annual payout from the Endowment Fund
- ▶ Added to District Designated Fund

# Adjustments



- ▶ **Additions to Global Grant DDF**
    - ▶ Payout from Endowment Fund = \$11,000+
    - ▶ Carryover from Previous Year = \$????
  - ▶ **Expenditures from Global Grant DDF**
    - ▶ Global Grant Scholarship = \$16,675
    - ▶ Transfer to PolioPlus = 20 percent of DDF\*
- \*(recommended by Trustees ~ district decides)

# World Fund



- ▶ TRF will provide 80 percent World Fund match for DDF allocated to a Global Grant

# District Designated Funds



- ▶ Unused DDF are rolled over to the next year
- ▶ Starting July 1, 2026, DDF that has not been used for 5 years will be directed to the World Fund or
- ▶ Districts may request unused funds go to PolioPlus, to support Rotary Peace Centers, an Area of Focus, or to Disaster Response Fund



# The Rotary Foundation



- ▶ Highest Rating from Charity Navigator for 15th Consecutive Year
  - ▶ Accountability & Finance
  - ▶ Culture & Community
  - ▶ Leadership & Adaptability



# **DISTRICT 7390**

**Grants Management**

**39 of 528 Districts**

**1 of 10 US Districts**

**Reporting Up-to-Date**

## For More Information

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