

Pre-PETS Training

Exercise 3: January 21, 2020

Foundation FAQs

**The Rotary Foundation**

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

The Rotary Foundation helps fund our humanitarian activities, from local service projects to global initiatives. Your club can apply for grants from the Foundation to invest in projects and provide scholarships. The Foundation also leads the charge on worldwide Rotary campaigns such as eradicating polio and promoting peace. Rotarians and friends of Rotary support the Foundation’s work through voluntary contributions.

The Foundation is governed by a Board of Trustees and has three funds: the Annual Fund, the PolioPlus Fund, and the Endowment Fund.

**Annual Fund**

The Annual Fund helps Rotary clubs take action today to create positive change in communities at home and around the world. Annual Fund contributions help us strengthen peace efforts, provide clean water and sanitation, support education, grow local economies, save mothers and children, and fight disease.

The Every Rotarian Every Year (EREY) initiative asks every Rotarian to support The Rotary Foundation every year. In addition to contributing to the Annual Fund on a regular basis, members are encouraged to get involved in a Foundation project or program. EREY aims to engage every Rotary club member by:

* Encouraging every Rotarian to contribute to the Annual Fund every year
* Encouraging every Rotarian to participate in a Foundation grant or program every year

Share System

Through the SHARE system, contributions to The Rotary Foundation are transformed into grants that change lives. At the end of every Rotary year, contributions to the Annual Fund-SHARE from all Rotary clubs in a district are directed into two funds:

* Fifty percent is credited to the World Fund.
* Fifty percent is credited to the District Designated Fund.

The Foundation uses the World Fund portion to pay for the worldwide grant and program opportunities available to all Rotary districts. The Rotary Foundation’s funding cycle makes district contributions available for use three years after they are received. The three-year cycle gives districts time to plan projects

#### Endowment Fund

The purpose of the Endowment Fund is to ensure the long-term viability of The Rotary Foundation and its programs. Contributions made to the Endowment Fund are invested in perpetuity with no erosion of the contribution itself.  Many might view the Endowment Fund as the foundation's “savings account” whose interest supports the Annual Fund, our foundations “checking account.”  Unlike the Annual Fund whose money is held for three years after contribution and then distributed, the Endowment Fund's principal is never spent and is structured to maintain value against inflation.

Contributions are invested in perpetuity. A percentage of the total value of the fund is directed annually to Foundation grants and programs. Types of contributions:

* Outright gifts of cash, investments, or other property
* Life income gifts (e.g., charitable remainder trusts, charitable gift annuities, pooled-income funds)
* Testamentary gifts through wills or estate plans
* Beneficiary of life insurance, retirement plan accounts, or other financial accounts

#### PolioPlus Fund

Polio eradication is Rotary’s top philanthropic priority. When Rotary launched the PolioPlus program in 1985, there were more than 350,000 polio cases in over 125 countries. Since 1988, when Rotary began working with its partners in the Global Polio Eradication Initiative to immunize more than 2.5 billion children, the incidence of polio has decreased 99.9 percent.

#### Exercises

1. Go to the Rotary International web site ([Rotary.org](http://rotary.org/)) and find the learning center. Take the Rotary Foundation course in the Learning Center.
2. Find the answers to the FAQs in the attached document
3. Go to the district web site ([Rotaryd5500.org](http://rotaryd5500.org/)) and find the minimum requirements for a club to qualify to apply for a District Grant
4. Go to the Zone website ([zone2627.org](https://zone2627.org/))and find the link to Rotary Foundation videos



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**Exercise 3: FOUNDATION FAQs**

1. Where can I find out how much I have donated to The Rotary Foundation?
2. What are Foundation Recognition Points?
3. What is the difference between the Recognition Amount and Available Recognition Points?
4. How does the club accumulate Foundation Recognition Points?
5. What is the difference between EREY and Sustaining Member?
6. Can the club require Foundation donations as part of the dues?
7. How can my club find a good program on The Rotary Foundation?
8. What is Rotary’s next project, after PolioPlus?
9. Why does The Rotary Foundation put so much emphasis on international projects, when we have needs here at home?
10. What is the difference between my club foundation and The Rotary Foundation?
11. If I have a Foundation question, where should I go for help?