

# **The Club Rotary Foundation Chair's TRF Survival Guide**

**The Rotary Foundation**



*working as an integral part of*

**Rotary International**



*to meet needs, to change lives  
and to leave a legacy  
of service to humanity*

# The Club Rotary Foundation Chair’s Survival Guide

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8. Attached (in the zipped file) quick reference documents:

- **The Rotary Foundation Resources** - *created by Steven Solomon*
- **Foundation Recognition Points Fact Sheet** \*
- **Future Vision Plan Resource List**

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\* The Foundation Recognition Points Fact Sheet will be undergoing revisions this year, so it is recommended that you periodically check to see if an updated version is available.

# The Club Rotary Foundation Chair's Survival Guide

## Preface

**The Club Rotary Foundation Chair** is, unquestionably, one of the most important positions in Rotary. Why? Because the real work of Rotary happens primarily at the club level, and The Rotary Foundation is “the enabling arm of Rotary.” That means the Rotary Foundation Chair is the key enabler in each club — helping the members to understand why their “*Every Rotarian Every Year*” support is so critical, and helping the club and its leaders to understand how to harness the immense power of The Rotary Foundation to help accomplish more than they ever thought was possible.

But in spite of the importance of this key position in each club, it has been recognized that Club Rotary Foundation Chairs have generally been given the least amount of training and access to resources for their roles of any of the club officers.

After I was asked to develop, during the summer of 2010, *The DGN's Survival Guide* for Zones 25 & 26 as a basic Rotary Foundation primer for District Governor Nominees, one of our District Rotary Foundation Committee Chairs asked, “Why can't we have something like this for our Rotary Foundation Chairs at the club level? They would really appreciate having this kind of information and these quick-reference tools at their fingertips.”

So “*The Club Rotary Foundation Chair's TRF Survival Guide*” was created, and it was rolled out in November of 2010 at the Arizona Tri-District Foundation Day in Mesa, AZ. With the overwhelming positive response of the Club Rotary Foundation Chairs attending that event, we began distributing copies of it to the District Foundation Chairs of the 11 other districts in Zone 26 for their clubs.

In a pre-GETS survey of the District Governor Elects of Zones 25 and 26, during the summer of 2011, the need for training and resources for Club Rotary Foundation Chairs was ranked as one of the greatest needs of the clubs in both of these zones. Consequently, we have updated the *Guide*, and there will be a concerted effort made during the 2011-2012 Rotary year to get a copy of the *Guide* into the hands of every Club Rotary Foundation Chair in these two Rotary zones before the end of the year.

Our Rotary Foundation is in transition. One hundred pilot districts, including two in each of our zones, are already testing the new Future Vision Plan. So this *Guide* presents both the status of programs as they currently exist for non-pilot districts, as well as explaining how the Foundation will be operating under the Future Vision Plan, which will be fully implemented for all of our districts during the 2013-14 Rotary year.

The *Guide* was created as a zipped file that could easily be emailed, or downloaded from the Zones 25 & 26 website. While there may be value in printing out copies of the *Guide* and its corollary quick reference documents, the greatest value in these documents comes from having them on your computer. If connected to the internet, you are just a mouse click away from being able to quickly access the reports and resources you may need. I am indebted to Steven Solomon, our creative and resourceful Annual Giving Officer at TRF, for developing these quick-click resources that all of us have come to appreciate. This year he has combined and reduced these quick-click resources down into one document, *The Rotary Foundation Resources*.

We plan to update the *Guide* each year. It is essentially “a work in progress” that we hope will prove to be a handy and invaluable tool for all Club Rotary Foundation Chairs, helping them to better understand the power and potential of our incredible Rotary Foundation.

*Arthur R. Harrington, Ph.D.*  
*Zone 26 Regional Rotary Foundation Coordinator*

# The Programs of the Rotary Foundation



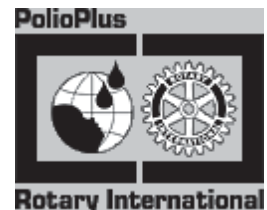
## Humanitarian Grants Program

- Disaster Recovery
- District Simplified Grants
- Matching Grants
- Health, Hunger and Humanity (3-H) Grants

## Educational Programs

- Ambassadorial Scholarships
- Group Study Exchange (GSE)
- Rotary Peace Fellowships, master's level degrees offered at one of the seven Rotary Centers for International Studies in peace and conflict resolution (2 year)
- Short-Term Peace & Conflict Resolution Studies (2 1/2 months)

## PolioPlus



PolioPlus is the corporate program of Rotary International, but activities related to it, such as fund-raising, are carried out through The Rotary Foundation. The goal of PolioPlus is the global certification of polio eradication.

Currently Rotarians and Rotary Clubs are raising US\$200 million to match \$355 million in challenge grants from the Bill and Melinda Gates Foundation in support of Rotary's polio eradication program.

**NOTE: 100 Pilot Districts have been selected to test over the next three years proposed changes that have been outlined in a Future Vision Plan adopted for Our Foundation.**

# More about the Programs of The Rotary Foundation

Through Foundation grants and programs, Rotarians and other contributors can help change the world. They can finance a well for a village that lacks clean water, improve the environment, or provide scholarships to educate the next generation. The grants and programs available to Rotarians allow them to realize Rotary's humanitarian mission throughout the world, including its number-one goal of eradicating polio.

## Humanitarian Grants Program

**Disaster Recovery** – Allows Rotarians to donate money in response to specific disasters. Funds are distributed to local committees to support recovery efforts. The program was created in 2005-06, and the Foundation currently administers a growing number of relief funds. Recent disaster recovery efforts include the Rotary Horn of Africa Famine & Refugee Relief Fund, the Rotary Japan Disaster Recovery Fund, the Rotary Haiti Earthquake Relief Fund and the Rotary Western Africa Flooding Recovery Fund.

**District Simplified Grants** – Support the service activities of districts locally and abroad.

**Health, Hunger and Humanity (3-H) Grants** – Fund large-scale, two- to four-year projects that improve health, alleviate hunger, or promote human development.

**Matching Grants** – Provide matching funds for the international service projects of Rotary clubs and districts.

- For the most recent statistics on what Rotary is doing worldwide through the use of Matching Grants, go to [www.rotary.org](http://www.rotary.org) and download the latest version of “Rotary Foundation Facts”.
- Also, to find projects and project partners, go to [www.MatchingGrants.org](http://www.MatchingGrants.org). This is a private initiative to publish a list of projects on the Internet - now available for use also with Future Vision Global Grants.

## Educational Programs

**Ambassadorial Scholarships** – The Foundation sponsors one of the largest international scholarship programs in the world. Scholars study in a different country, where they serve as unofficial ambassadors of goodwill. Since 1947, more than 47,000 scholars from 110 countries have received scholarships of more than \$476 million through The Rotary Foundation.

**Group Study Exchange (GSE)** – Annual awards are made to paired Rotary districts to cover travel expenses for a team of non-Rotarians from a variety of professions. Rotarian hosts organize a four- to six-week itinerary of vocational, educational, and cultural points of interest. Since 1965, more than 57,000 individuals (almost 12,000 teams) from 100 countries have participated at a cost of more than \$92 million.

**Rotary Peace Fellowships** – Each year, up to 110 scholars are sponsored to study at one of the seven Rotary Centers for International Studies in peace and conflict resolution for a master's-level degree. [Sign up](#) for the *Peace Net* newsletter, which provides a forum for the Rotary Centers community.



# Funding Our Foundation

www.rotary.org



## Annual Programs Fund Contributions

Whether given by a club or an individual, any un-designated contributions (those not earmarked for an immediate project) go into The Rotary Foundation's 3-year investment cycle. During that period of time, the funds generate enough income to cover *all* of The Rotary Foundation's operating expenses, with money left over. So, for every \$1 contributed now, at least \$1.00 is available at the end of the 3 years to be directly applied to meeting a specific educational or humanitarian need — without *any* deduction for operational overhead.

**At the end of the 3-year cycle, 50% of this year's un-designated contributions by individuals and clubs becomes District Designated Funds (DDF).** In other words, our district gets to decide how those funds will be spent — to fund Rotary Ambassadorial Scholarships, to be used to match club funds for Matching Grants, to fund additional Group Study Exchange Teams, or a variety of other educational or humanitarian programs.

**What happens to the other 50% of the total SHARE amount at the end of the 3 years?** It becomes a part of the World Fund, administered by the Rotary Foundation Trustees. That money is used to fund a Group Study Exchange Team for each Rotary district, to further match club and district funds for Matching Grants Projects, to fund the 3-H (Health, Hunger & Humanity) Grants and to fund numerous other kinds of humanitarian & educational grants.

**Contributors to the Annual Giving Fund of The Rotary Foundation can become Paul Harris Fellows**, with appropriate pin & plaque recognition, at the \$1,000 level, or **Multiple PHFs** with additional \$1,000 contributions, with appropriate pin recognition at each new level. A sapphire is added to the PHF pin for each additional \$1,000, up to 5 sapphires (for \$6,000 contributed), and then converts to a 1-ruby pin for \$7,000, 2-ruby for \$8,000 and 3-ruby for \$9,000. A **Major Donor** 1-diamond pin and a crystal are awarded at Level 1 - \$10,000; a 2-diamond pin & crystal at Level 2 - \$25,000; a 3-diamond pin & crystal at Level 3 - \$50,000; a 4-diamond pin & crystal at Level 4 - \$100,000; a 5-diamond pin & crystal at Level 5 - \$250,000; a 6-diamond pin & crystal at Level 6 - \$500,000, and a 7-diamond pin & crystal at Level 7 - \$1,000,000. **Sustaining Members** (aka "Centurions") are those who commit at least \$100 per year toward support of the Annual Giving Fund of The Rotary Foundation. The names of Major Donors at Levels 2 - 6 are displayed in the Rotary Hall of Honor at Rotary International's World Headquarters in Evanston, Illinois. The photographs of those giving \$250,000 or more to the Foundation are permanently displayed in that Hall of Honor as Arch C. Klumph Society Members. Also note in the attached "*Rotary Foundation Resources*" new levels of ACKS recognition.



## Permanent Fund Contributions

Contributions to Rotary Foundation's Permanent Fund permit a person to give in a way which will continue to fund humanitarian & educational projects through Rotary for as long as time exists. The reason this is possible is that the principle amount of any gift made to the Permanent Fund is never spent. That money is invested, and it continues to earn monies which can be used each year to accomplish good around the world.

Cash contributions, along with contributions of personal property, real estate and insurance, can be made directly to the Permanent Fund. Or these can be left to the Permanent Fund in one's will, as a part of the estate to be distributed upon death. There are also many creative ways in which cash or property can be given in trust to The Rotary Foundation's Permanent Fund, providing for a substantial tax benefit now, along with a dependable monthly income stream which continues until one dies.

Any individual or couple designating \$1,000 or more in their will for TRF's Permanent Fund becomes recognized as a **Benefactor** and awarded appropriate recognition (wings attached to the back of the PHF or Rotary pin).

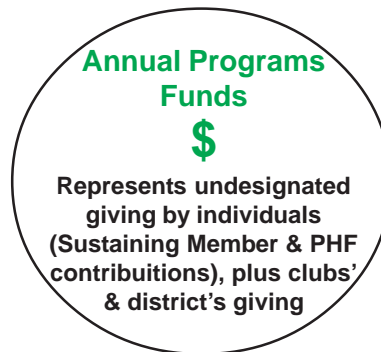
Any individual or couple designating \$10,000 or more in their will for TRF's Permanent Fund is eligible for membership in The Rotary Foundation's **Bequest Society**, and for appropriate recognition with a Crystal and a 1 Diamond Pin. Additional crystal and diamond pin recognition are awarded at the same \$25,000, \$50,000, \$100,000, \$250,000, \$500,000 and \$1,000,000 levels described for Major Donors in the Annual Fund section above.

**Major Donors**, who give cash or property, either directly or via trusts, to TRF's Permanent Fund are eligible for similar Crystal and Diamond Pin recognition at the same levels.

All contributors to TRF's Permanent Fund are given the option of designating the proceeds from their gift to either augment their Rotary District's DDF (Share) funds each year, or augment the World Fund, administered by the Foundation's Trustees. Contributors who make significant gifts can, at certain levels, designate the proceeds for funding a specific Foundation or District program. At certain levels, a named fund can also be created.

# Understanding the SHARE System

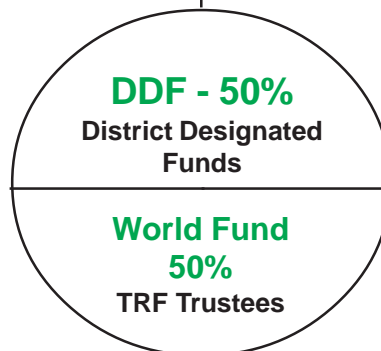
## What Happens To Your District's Total Undesignated Contributions to The Rotary Foundation's Annual Programs Fund?



The money is invested for 3 years.

All of the Rotary Foundation's overhead and administrative expenses are covered out of the investment income earned.

After 3 years of investment, and deducting TRF expenses, at least \$1.00 from every original \$1.00 contributed yet remains to be applied to educational & humanitarian programs and projects.



## SHARE

(The name describes the entire amount remaining — with control over it to be *shared* by the District and by the TRF Trustees on a 50% - 50% split)

**Out of its DDF** (50% of the total given by the district 3 years prior), the District can decide how it wants to split up the available funds in any Rotary Year to provide Ambassadorial Scholarships, matching for Matching Grants the clubs submit and additional GSE Teams. A district can apply for and utilize up to 20% of its DDF for District Simplified Grants.

**Out of its World Fund 50%**, TRF Trustees provide funds for an annual Group Study Exchange for every district that wishes to participate, matching funds for the Matching Grants submitted by clubs and districts, the 2-year Rotary World Peace Scholarships, along with Individual Grants and Health, Hunger & Humanity Grants.

# Using Member Access and Reports

Knowing how to use the **Member Access Portal** on the Rotary International website, [www.rotary.org](http://www.rotary.org), is absolutely essential for every Club Rotary Foundation Chair. Every Rotarian has the ability, via Member Access to:

- Make TRF Contributions
- View their TRF contributions and recognition history
- Register for Rotary International Meetings
- Search the online Official RI Directory
- Manage their Rotary e-mail subscriptions
- View secure sites

Beyond this, club and district officers have access to many additional records and reports. Club Foundation Chairs are authorized to access the Club Recognition Summary (CRS) for their own clubs, along with the MCR, SHARE, EREY Eligibility and Polio Reports. While you really don't need to know everything, you do need to know where to look, and who to ask. Member Access will be a huge help to you in locating what you need, when you need it — *if* you have learned how to use it. So let's run through the basics:

## How do I register for Member Access?

As you log on to the RI website, at [www.rotary.org](http://www.rotary.org), you will see at the top right side of the page in small letters (under the blank search box) the words, "Member Access." Click on those words. The next screen that will come up will have a prominent blue box containing the words, "Register Now." If you do not already have a login e-mail address and password that you have registered, click on the blue box. You will need to provide a valid e-mail address and create a password that you will be using each time in the future when you log in via Member Access. You will also be asked to provide additional information, so the website can determine your relationship to Rotary and match you with your record in their database. (Note: If your Club President has not turned your name and contact info into Rotary, identifying you as your club's Rotary Foundation Chair, they will not have your position in the system.)

Once you have provided this information, you will receive a verification e-mail with a hyperlink within 24 hours. You must click on that verification hyperlink to complete the registration process. If you do not see the e-mail in your inbox, check your Spam/Bulk/Junk folder. Until you get that verification email with its hyperlink, you cannot complete the process. Please note that all of this is essential to keep Member Access secure, and to protect your privacy, restricting access to authorized users only. If you still don't receive the verification e-mail, contact your internet provider for technical assistance, since either some software or your service provider has a setting that is blocking delivery of this e-mail.

## Logging in via Member Access

After you have completed your registration, each time you go to the RI website, click on the same "Member Access" words at the top of the screen, and then enter your registered e-mail address and password. (If you need to re-set your password, there is a utility for doing this.) Once you have logged in, you should see, based upon the information you have provided, and the reporting of your position in Rotary, the menu options that are appropriate for your position. Clicking on each of those available options will take you to the report, list, information or forum associated with that access button.

Please understand that Rotary does *not* have a magical crystal ball. **Access is available only when positions are reported.** Example: A Club President may call and complain that his Club Foundation Chair can't view the Monthly Contribution Report (MCR) for their club via Member Access. Did the President ever enter the information, via Member Access, to let Rotary know who the club's Foundation

Chair is? Obviously, without that vital information in the system, the option to access that report will be not listed when the Club Foundation Chair logs in via Member Access. **If you don't have access as Club Rotary Foundation Chair, ask your Club President to report your name and position to TRF via his Member Access.**

### **So what will I be able to access as the Club's Rotary Foundation Chair?**

Club Rotary Foundation Chairs can use Member Access to (1) Contribute to TRF, (2) View personal contribution history, (3) Search the online Official Directory, (4) Manage your E-mail Preferences, (5) Register for meetings; (6) View your own clubs's Club Recognition Report, (7) View your club's Monthly Contribution (MCRs), SHARE, EREY Eligibility and Polio Reports.

### **How can I remember what all of these acronyms for reports and positions mean?**

Admittedly, both Rotary and our Foundation have a mystifying alphabet soup that is hard to remember. So, to aid you in understanding and remembering what all of these acronyms mean, you will find on pages 12 and 13 of this Guide a helpful list of Rotary and Foundation Acronyms.

### **Other attached fingertip resources to make your life easier as a Club Rotary Foundation Chair:**

It really does help to have some reference guides and quick-access tools that you can rely on to find what you need quickly and efficiently. Here are some of the other helpful tools we have gathered for you and included in the zipped file with your *Club Rotary Foundation Chair's TRF Survival Guide*:

- **The Rotary Foundation Resources** - a wonderful quick reference resource tool created by Steven Solomon, on the TRF staff at Evanston, who serves as our Annual Giving Officers for Zone 25 & 26. It provides helpful contact information about the TRF Leadership Teams for both zones, as well as TRF support staff, publications, foundation programs available, TRF reports available, TRF Recognition Awards, and fund-raising tools — with amazing links you can simply click on that will take you directly to those resources.
- **Foundation Recognition Points Fact Sheet** is the current and most reliable reference to help you answer any and all questions about how Foundation Recognition Points can, and cannot, be used. This is a frequent subject of questions, and the rules did change at the beginning of the 2009-10 Rotary year. It is being revised again this year, and we will update this in the zipped file of the *DGN's TRF Survival Guide* posted on the zones website when it becomes available.
- **Future Vision Plan Resource List** gives you all of the Future Vision documents that are available, and shows you how to quickly access each of them.

# So What is Changing with the Future Vision Plan?

## First of all, why have we developed a Future Vision Plan?

- We are preparing for The Rotary Foundation Centennial and our second century of service.
- The immense growth of TRF programs and services has required restructuring.
- Our increasing relevance in the philanthropic world necessitates defining our focus areas.
- Our greatest strength in Rotary has been our ability to evolve and change to meet needs.
- Rotarian feedback has provided ideas and encouragement to guide us in developing a plan.
- Sustainability, significance and simplification continue to be driving concerns.

## What are our objectives in developing this plan?

- To sharpen our focus and increase the impact of all of our grant activity
- To simplify the Foundation's programs and operations
- To transfer more decision-making to the local level
- To increase visibility, image and resources

## What are some of the major changes?

What we have had in the past	What we will have under the Future Vision Plan
District Simplified Grants	District Grants
Matching Grants	Global Grants
Group Study Exchange	Vocational Training Teams
Ambassadorial Scholars	Will now come under District or Global Grants
PolioPlus	PolioPlus (no change)
Peace Centers	Peace Centers (no change)
No defined areas of focus	Six defined Areas of Focus
No Qualification required	Qualification required for districts and clubs to receive Foundation funds

## What are the 6 Areas of Focus?

- Basic Education and Literacy
- Disease Prevention and Treatment
- Economic and Community Development
- Maternal and Child Health
- Peace and Conflict Prevention/Resolution
- Water and Sanitation

## How is the Future Vision Plan being tested?

Beginning with Rotary year 2010-11, one hundred representative Pilot Districts selected from all over the Rotary world are involved in a 3-year test of the Future Vision Plan before it is implemented with the remainder of the Rotary districts.

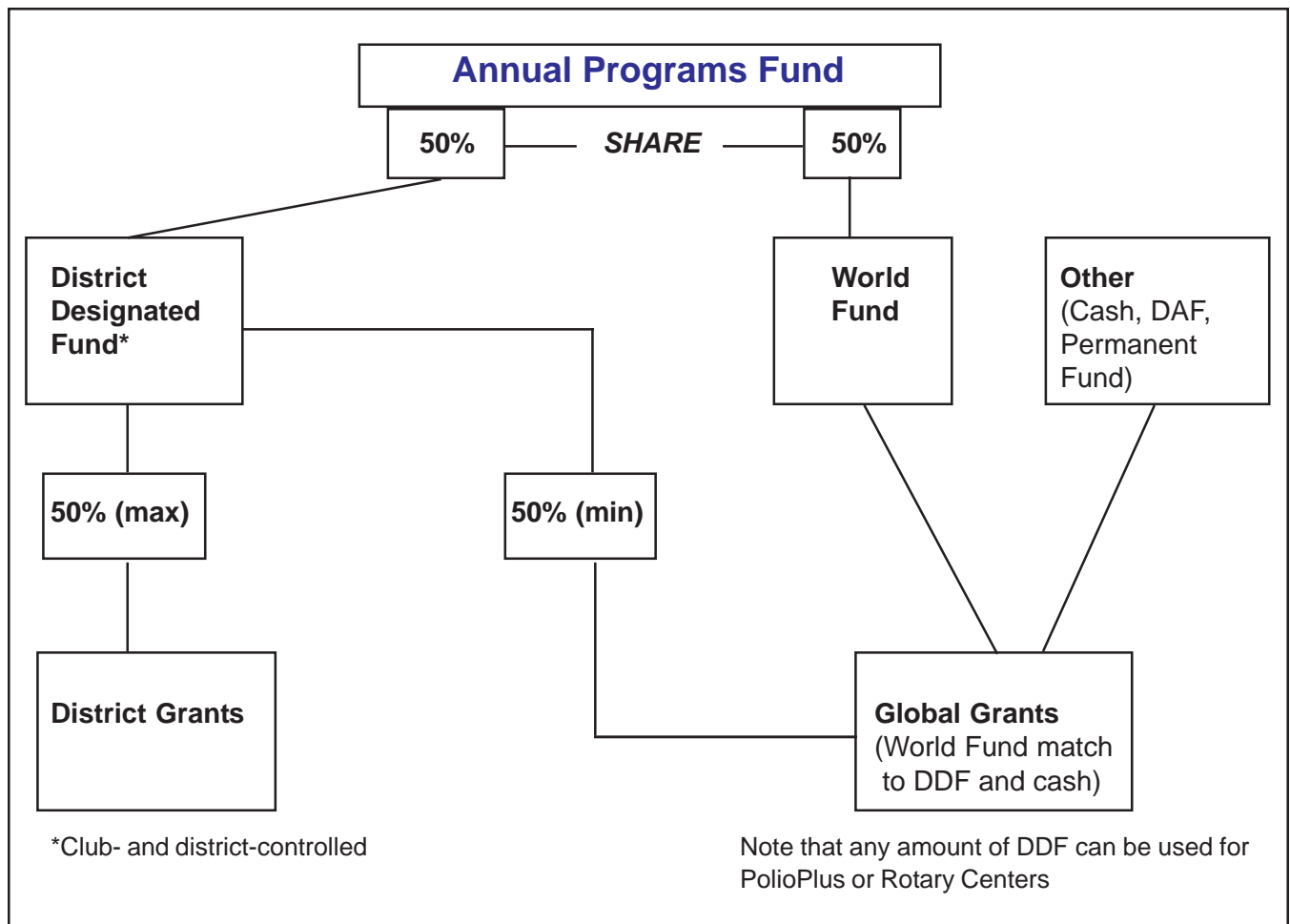
**What will characterize Rotary Foundation District Grants?**

- Simple, flexible, innovative
- Educational and humanitarian activities consistent with the mission
- Single “block” grant awarded annually
- Utilized for smaller activities and projects
- Fund both local or international activities
- Local decision making with broader guidelines
- No World Fund match involved

**What will characterize Rotary Foundation Global Grants?**

- Long-term projects
- Rotarian participation
- Larger grant awards
- Sustainable outcomes
- Support the 6 Areas of Focus
- Provide World Fund match

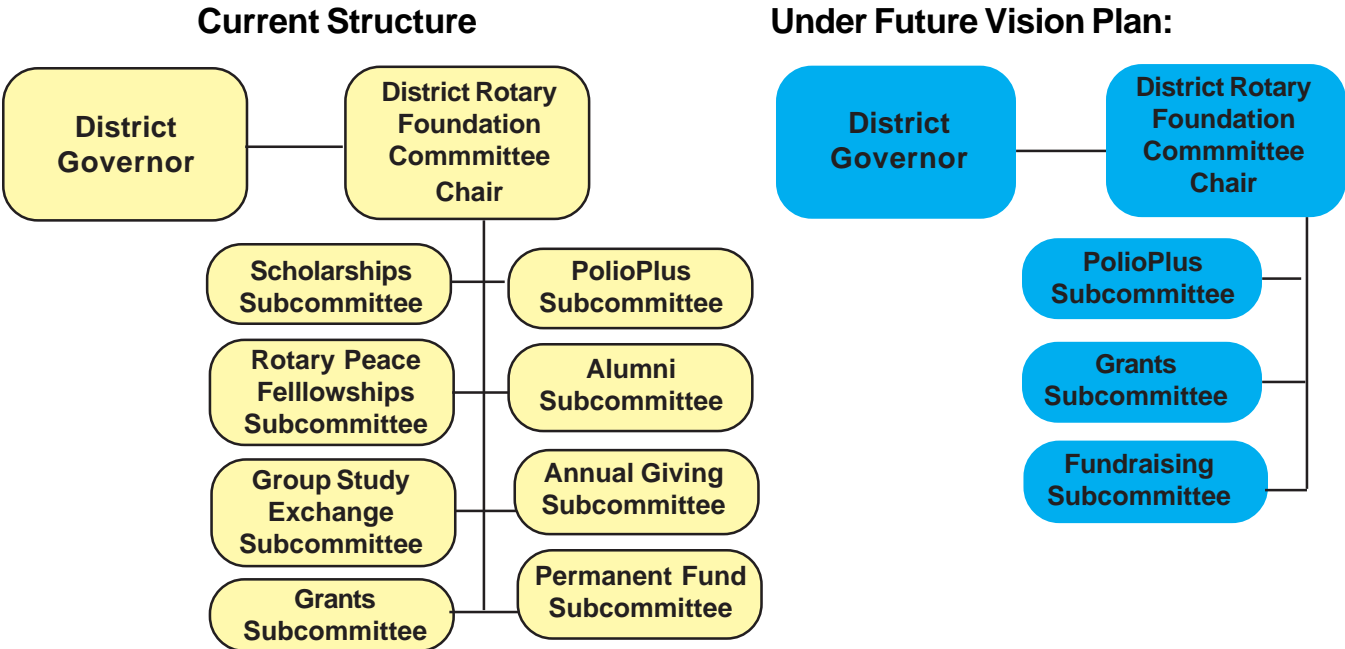
**What does the Funding Model look like under the Future Vision Plan?**



# District Leadership Structure Under Future Vision Plan

The Rotary Foundation district leadership structure has been simplified to allow more flexibility for the District Rotary Foundation committee. The new structure is in line with the Future Vision Plan to simplify Foundation programs and processes consistent with the mission and to increase the sense of ownership at the district and club levels by transferring more decisions to the districts. Your district will need to determine how to organize under the leadership structure outlined below. In addition, your district might consider retaining some of the current subcommittees until all current open projects are complete.

## Recommended District Leadership Structure



### District Rotary Foundation Committee Chair

- Report all Foundation activities to the district governor
- Provide one of two authorizing signatures for use of District Designated Fund
- Confirm that club sponsors of global grant applications are qualified
- Oversee the district’s qualification application
- Serve as liaison to RI district committees
- Provide support to club Rotary Foundation committees

### Grants Subcommittee

- Oversee the qualification of clubs
- Serve as a resource on Rotary Foundation grants
- Ensure stewardship practices are implemented
- Enforce the district’s policy for distributing grant funds
- Report misuse or irregularities in grant-related activities to The Rotary Foundation, and conduct local investigations
- Promote and encourage participation in the Rotary Centers for International Studies program

## **Fundraising Subcommittee**

- Assist clubs in setting and achieving fundraising goals
- Organize club and district fundraising activities
- Motivate, promote, and advise clubs on Foundation fundraising initiatives
- Coordinate donor appreciation events within the district

## **PolioPlus Subcommittee**

- Encourage donations
- Organize district PolioPlus activities
- Ensure recognition of exemplary polio eradication activities
- Present on PolioPlus
- Coordinate with PolioPlus committees and governmental agencies

In addition to the duties and responsibilities outlined in the Rotary Code of Policies 17.030.3., the following Foundation duties and responsibilities will be added to the district committees listed below for districts participating in the Future Vision Plan pilot.

## **Membership Development Committee**

Coordinate district-wide Rotary International and Rotary Foundation alumni activities in order to help recruit and involve these potential Rotarians.

## **District Finance Committee**

Work with the district Rotary Foundation committee chair to disburse grant funds and to ensure that proper records of grant activity are maintained for reporting purposes.

## **District Public Relations Committee**

Promote all aspects of The Rotary Foundation such as PolioPlus, grant successes, Rotary Foundation alumni activities, and Rotary Foundation awards, to Rotarians and the community.

## **District Conference Committee**

Include time in the agenda to report on Rotary Foundation grant activities if no report was or will be provided at another district meeting to which all clubs are invited or eligible to attend.

## **District Convention Promotion Committee**

Promote all Rotary Foundation pre-convention and convention activities.

## **District Training Committee**

Work with the district governor and the district Rotary Foundation committee chair to plan, organize, and promote the district Rotary Foundation seminar.

# Future Vision Resources

E-Mail: [fvqualification@rotary.org](mailto:fvqualification@rotary.org) and [futurevision@rotary.org](mailto:futurevision@rotary.org)

RI Website: [www.rotary.org/futurevision](http://www.rotary.org/futurevision)

Sign up for the Future Vision Newsletter: <http://www.rotary.org/en/Members/RunningADistrict/FutureVisionPilotProgram/Pages/FutureVisionnewsletter.aspx>

## Future Vision Glossary

**agreement form** Legal document stating the responsibilities of grant sponsors and The Rotary Foundation.

**areas of focus** The six priority world needs to which The Rotary Foundation is directing its financial and volunteer resources to have a sustainable and measurable impact. The areas of focus are peace and conflict prevention/resolution, disease prevention and treatment, water and sanitation, maternal and child health, basic education and literacy, and economic and community development.

**beneficiary** Group or individual directly benefiting from Foundation grants. These include scholars, vocational training teams, and communities.

**capacity building** The process of developing and strengthening the knowledge, skills, and abilities necessary for individuals and communities to achieve sustainable development.

**club memorandum of understanding** Agreement between a club and its district, explaining the measures that the club will undertake to ensure proper implementation of grant activities and management of Foundation grant funds. By authorizing this document, the club agrees that it will comply with all Foundation requirements.

**contributors** Clubs or districts that provide funding but are not the primary sponsors of a grant.

**cooperating organization** An organization — usually nonprofit but sometimes governmental — that is directly involved in the implementation of a project, offering technical expertise and project coordination; however, the project should be controlled by the cosponsoring Rotary clubs or districts. Foundation funds may not be sent directly to a cooperating organization.

**district memorandum of understanding** Legal agreement between the district and the Foundation that lists the terms of district qualification and the requirements for ensuring proper oversight of grant funds.

**host sponsor** Club or district in the location where the project or activity takes place.

**international sponsor** Club or district outside of the country/geographical area where the project or activity takes place.

**measurable** Grant outcome that lends itself to data collection and analysis in order to demonstrate quantifiable results and impact within a community.

**participation** Hands-on involvement throughout the life of the grant, which includes planning, direct implementation, and evaluation.

**primary contact** Rotarian who serves as the point person between The Rotary Foundation and the project partner club or district. Each grant has two primary contacts: one host and one international.

**primary sponsors** One host club/district and one international club/district who are jointly responsible for submitting a global grant application, implementing the activity, and accounting and reporting to The Rotary Foundation.

**qualification** The process of ensuring that districts and their member clubs have the appropriate financial and stewardship controls in place to properly manage foundation grant funds.

**report** Details on the progress of the implemented project. A report must be submitted at least every 12 months for the life of the grant.

**Rotary Foundation District Grants** Annual block grants made to districts to support short-term projects, both locally and internationally. Districts may request up to 50 percent of their available District Designated Fund (DDF) for these grants in a given Rotary year; these funds may be used to support a variety of project types, including vocational training teams, scholarships, and humanitarian service activities.

**Rotary Foundation Global Grants** Grants that support sustainable, high-impact projects in one of the six areas of focus. Clubs and districts have the option of either developing their own global grant projects, which are funded by the sponsors and a matching World Fund award, or choosing a packaged global grant, developed by the Foundation and its strategic partners. With this option, the World Fund and the strategic partner provide 100 percent of the funding, and Rotarians implement the grant project.

**stewardship** Proper use of Rotary Foundation funds in accordance with the terms of qualification.

**strategic partner** An organization involved in a strategic partnership with The Rotary Foundation.

**strategic partnership** Trustee-approved relationship between The Rotary Foundation and another organization (such as a nongovernmental organization, corporation, or university) that is currently working in one or more areas of focus; can share costs by providing funding, technical expertise, or advocacy support at a value of approximately US\$1 million or more; increase opportunities for, or the impact of, service opportunities for Rotarians; and operate on a global scale. It is anticipated that strategic partnerships will lead to packaged grant opportunities for humanitarian projects, vocational training, and/or scholarships.

**sustainable** Grant outcome that can be maintained long-term to serve the ongoing needs of a community after grant funds have been expended.

# ROTARY & FOUNDATION ACRONYMS

3-H	Health, Hunger and Humanity Grants
AG	Assistant Governor
AGSC	Annual Giving Subcommittee Chair (District)
AGO	Annual Giving Officer (TRF staff)
APF	Annual Programs Fund
ARRFC	Assistant Regional Rotary Foundation Coordinator
AKS	Arch C. Klumph Society
BS	Bequest Society
CMOU	Club Memo of Understanding (required of all clubs under Future Vision Plan)
COD	Code of Policies (Both RI and TRF have a Code of Policies)
COL	Council on Legislation
CPDT	Coordinator Professional Development Training
CRS	Club Recognition Summary (either for your own club, or for all clubs in the district)
DA	District Assembly
DC	District Conference
DGTM	District Governor's Training Manual
DAF	Donor Advised Fund
DDF	District Designated Funds
DG	District Governor
DGE	District Governor-elect
DGN	District Governor-nominee
DGND	District Governor Nominee Designate
DRFC	District Rotary Foundation Chairperson
DSG	District Simplified Grant
DT	District Trainer
DTC	District Training Committee
DRWPFC	District Rotary World Peace Fellowships Chair
EP	Educational Programs (TRF staff)
EREY	Every Rotarian, Every Year
FRP	Foundation Recognition Points
FVP	Future Vision Plan
GETS	Governor-Elect Training Seminar
GG	Global Grant
GNATS	Governor Nominee Training Seminar
GS	General Secretary
GSC	District Grants Subcommittee Chairperson
GSE	Group Study Exchange
HOF	House of Friendship
HP	Humanitarian Programs (TRF staff)
IA	International Assembly
IC	International Convention
IPDG	Immediate Past District Governor
MCR	Monthly Contribution Report
MD	Major Donor (Levels 1 through 6)
MDC	District Membership Development Chairperson
MDRC	Membership Development and Retention Committee
MG	Matching Grants
MGA	Major Gifts Adviser (Zone)
MGO	Major Gifts Officer (TRF staff)
MGPG	Major Gifts/Planned Giving Subcommittee Chairperson
MOP	Manual of Procedure
MOU	Memorandum of Understanding (required for districts, under Future Vision Plan)
MPHF	Multiple Paul Harris Fellow (PHF+1 to PHF+8)
NID	National Immunization Day (polio)

## RI & TRF ACRONYMS (cont'd.)

OC	Office Communication
OD	Official Directory
ORC	One Rotary Center
PDG	Past District Governor
PE	President-elect (club)
PETS	President-Elects Training Seminar
PF	Permanent Fund
PFC	Permanent Fund Committee
PFCS	Permanent Fund Service Chair (District)
PHF	Paul Harris Fellow
PHSC	Paul Harris Society Coordinator (District)
PN	President-nominee (club)
PP	PolioPlus
PPE	Preserve Planet Earth
PPP	PolioPlus Partners (currently not an active program)
PPSC	PolioPlus Sub Committee
PRID	Past Rotary International Director
PSA	Public Service Announcements
RAGs	Rotarian Action Groups
RC	Rotary Coordinator
RCC	Rotary Community Corps
RCIS	Rotary Centers for International Studies
RCMGI	Rotary Centers Major Gifts Initiative
RCPCS	Rotary Centers in Peace and Conflict Studies (Chulalongkorn University)
RFAC	Rotary Foundation Alumni Coordinator (Zone)
RF	Rotary Fellowships
RFE	Rotary Friendships Exchange
RFSM	Rotary Foundation Sustaining Member
RI	Rotary International
RIBI	Rotary International in Great Britain and Ireland
RID	Rotary International Director
RIHQ	Rotary International Headquarters
RIMC	Rotary International Membership Coordinator
RIPE	Rotary International President-elect
RPCS	Rotary Peace Center Studies
RPIC	Rotary Public Image Coordinator
RRFC	Regional Rotary Foundation Coordinator (Zone)
RSL	Rotary Senior Leaders (President, P-elect, P-nominee, current and incoming Board of Directors and TRF Trustees)
RV	Rotarian Volunteers
RWPF	Rotary World Peace Fellow
RYLA	Rotary Youth Leadership Award
SAA	Sergeant-At-Arms
SAR	Semiannual Report (for the club)
SSC	District Scholarships Subcommittee Chairperson
TRF	The Rotary Foundation
VSC	District Vocational Service Chairperson
VSG	Volunteer Service Grant
WCS	World Community Service
YE	Youth Exchange
ZCC	Zone Challenge Coordinators (Rotary's US\$200 Million Challenge)
ZFDS	Zone Foundation Development Specialist
ZFVTC	Zone Future Vision Transition Coordinator
ZI	Zone Institute