



SERVE TO CHANGE LIVES



# The Rotary Foundation: Rotary's Service Enabler

**RC Stafford**  
**November 10, 2021**

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# TRF Strategic Overview

- **Purpose—“Do Good in the World”**
- **Track Record—104 years old**
- **Large— $\frac{1}{3}$  Billion \$\$/year (2019-20—\$338.7M)**
- **Efficient—92% spent on program awards and operations (4-star Charity Navigator rating)**
- **Flexible—multiple funds for donations**
- **Unique—provides amazing amount of local control of fund use**



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Foundation

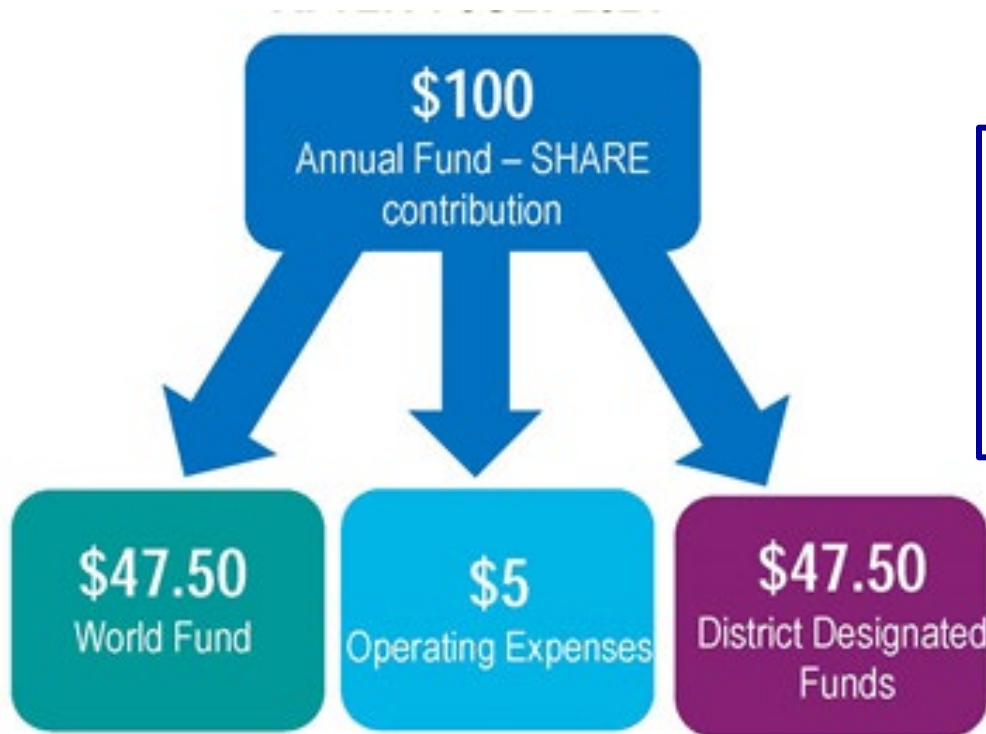


# Choice of Funds

- **Annual Fund**—funds spent mostly on grants
  - **SHARE**—unrestricted, ~half returned to districts for their use after 3 years
  - **Areas of Focus**—restricted to 7 grant areas
- **PolioPlus**—restricted use, funds spent almost immediately
- **Endowment**—principal never spent, only the earnings



# Annual Fund-SHARE



- Grants in 2019-20:
  - Global: \$95.6M
  - District: \$33.6M



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# PolioPlus



- **Commitment spans 35 years; 99.9% decrease in polio cases since start**
- **Rotary has contributed over \$2.2 billion; received \$151M, awarded \$151M in 2020-21**
- **3 billion children vaccinated; an estimated 19 million would have contracted polio**
- **Only 2 countries still endemic—Pakistan, Afghanistan; some vaccine-derived cases in others**
- **World is nearly polio free; GPEI has 5-year program to finish**





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# Endowment

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- Created in 1982; only earnings are spent
- **Current assets = \$500M**; \$17.6M earnings spent in 2019-20 on Peace Fellowships, Global & District Grants, others



- 3.7% investment return average over 20 years

- **Current expectancies = \$840M**
- “2025 by 2025” Endowment Campaign
  - Assets: \$500M **→** \$1.0B
  - Expectancies: \$840M **→** \$1.025B **= \$2.025B**



# Donor Recognition

- **Paul Harris Fellow  
(and multiples)**



- **Benefactor**



- **Paul Harris Society**



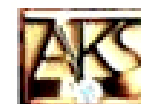
- **Major Donor**



- **Bequest Society**



- **Arch Klumph Society**





# Grant Types



- **Block District Grant** [from DDF]
  - Entrusted to districts; minimal restrictions
  - Distributed to clubs that apply
  - Smaller projects, local or international
- **Global Grants** [from DDF, clubs, World Fund matches]
  - Humanitarian
  - Scholarships
  - Vocational Training Teams
  - \$30,000+, must be international







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# What's New?

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- **World Fund Matches Lowered:**
  - DDF transfer to PolioPlus Fund: 100%  50%
  - DDF funding of Global Grant: 100%  80%
  - Club cash funding of Global Grant: 50%  0%
- **DDF “Rollover Redirection”:** 5-year-old DDF carryover
- **5-Year GPEI Strategic Plan:** 2023: polio eradicated; 2026: world certified polio free
- **PolioPlus Society or Association:** maybe!
- **7<sup>th</sup> Area of Focus—Environment:** some no-nos
- **Rotaractor Grants:** beginning July 1, 2022