



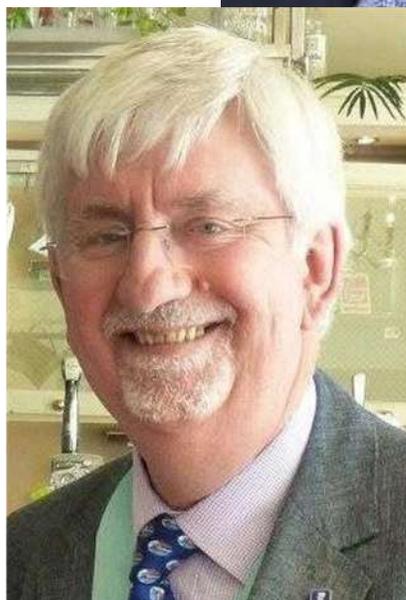
# IMPACT OF THE ROTARY FOUNDATION

Rotary Club of London – January 2026



## I work with the RGBI Foundation Team including District Foundation Chairs & Club Foundation Chairs to:

- Visit Clubs and Districts to promote the work of the Foundation and give non-donors a better understanding of what the Foundation does through its various Funds and Areas of Focus
- Steward the current Donors to the Foundation and encourage more Rotarians to donate directly to the Foundation
- Explain how Rotarians can help sustain the future of The Rotary Foundation by leaving a Bequest in Will to the Endowment
- [seamus.grant@rotary.org](mailto:seamus.grant@rotary.org)
- 07340 678752



Regional Rotary Foundation  
Chair – PDG Mike Hodge



Endowment Major Giving  
Adviser – PDG Cheryl Law

# The Mission of **The Rotary Foundation**

*“The Rotary Foundation helps Rotary members to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty”.*



# The Rotary Foundation of Rotary International



**501c-4 – Board of Directors**

**Membership Organisation**

**Revenue Sources:**

***Dues***

***Investment Income***

***Services & Other Activities***

**Expenses**

***Related to Dues***

***Related to Services & Other Activities***



**501c-3 – Board of Trustees**

**Charity**

**Revenue Sources:**

***Contributions***

***Investment Income***

**Expenses**

***Program Awards***

***Program Operations***

***Fund Development***

***Administration***

***Foundation income and expenditure are kept entirely separately from RI's income and expenditure***

# ANNUAL FUND

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- Collaborations between Rotary clubs both locally and worldwide
- EREY @ \$25 pa
- Sustaining Members \$100pa / £6 pm
- Funds raised spent swiftly through Annual Fund/SHARE on grant projects and Foundation

# POLIOPLUS FUND

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- No. 1 Priority of the Rotary Foundation
- 2/1 match of the Gates Foundation - a donation of \$100 to TRF = \$300 with Gates match funding
- 2024-25 - 28 Grants = \$147.4m
- Over \$2.5billion raised and distributed since 1985
- Image shows Rukhsar who is the last recorded case of polio in India in 2011



Rukhsar Khatun

# DISASTER RESPONSE FUND

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- Disaster recovery and rebuilding efforts
- Floods, earthquakes, hurricanes, volcanos
- Average grant <sup>US</sup>\$25,000
- In 2022, more than \$5m donated to refugee crisis in Ukraine
- 74 DRF grants totalling \$1.9m in 2024/25
- 1,112 Grants totaling \$39.8m to date



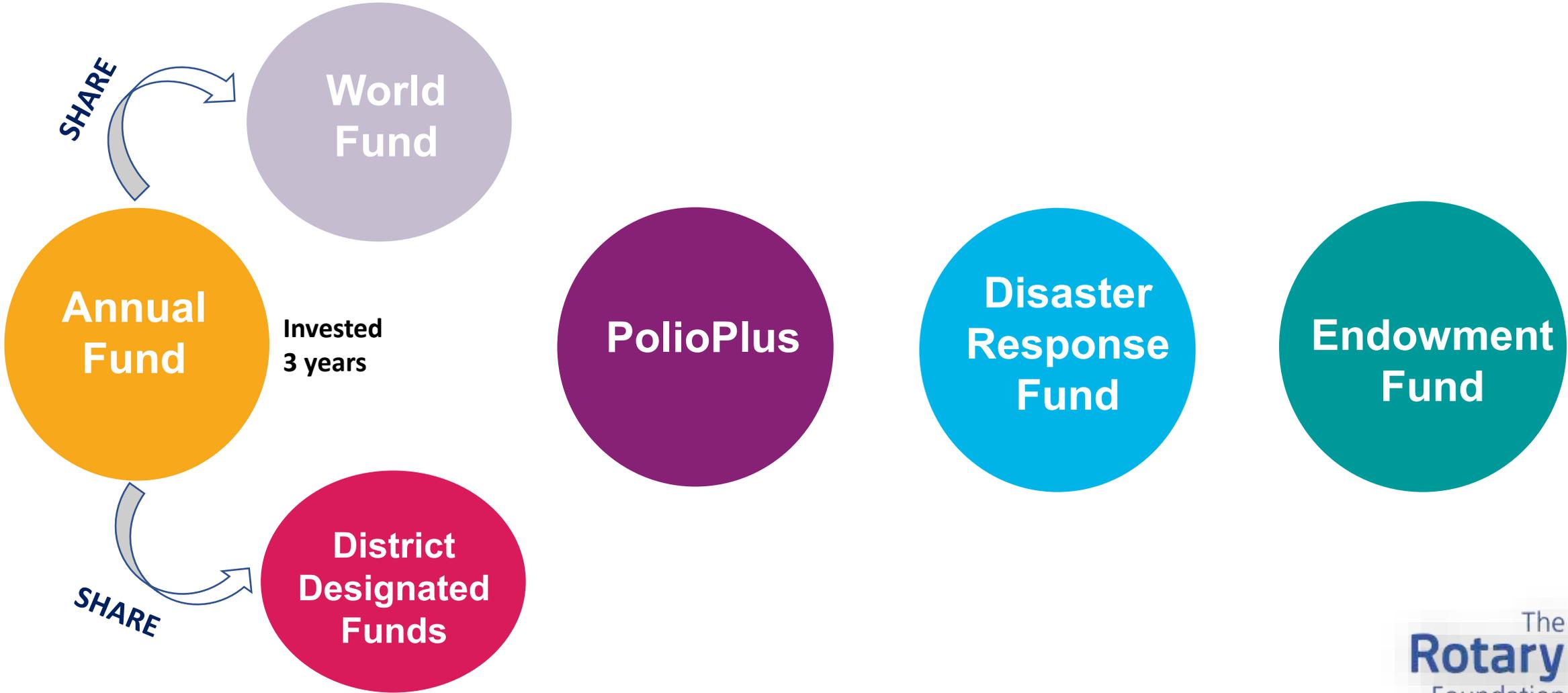
# ENDOWMENT FUND

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- Gifts to this fund are invested **forever**, and the **spendable earnings** are used to support the donor's program of choice
- A gift of **\$2,500 can provide \$100 every year for many generations in the future**
- Fund accepts **cash gifts or bequests** through a donor's Estate - Last Will & Testament
- Endowment balance now at \$900m with future commitments of over £1.1bn
- 6.8% of Endowment is from RGBI Donors



# The Rotary Foundation Funds



# District Grants

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- **Smaller-scale and short-term activities**
- **Local or international initiatives**
- **Club submission required**
- **Humanitarian projects, including travel and disaster relief initiatives**
- **Scholarships and Youth programs**
- **2024/25 = 468 District Grants @ \$27.8m incl 20 in RGBI Average Grant = \$61k**

# Global Grants

**Large-scale international activities**

- **Sustainable results**
- **7 Areas of Focus – Average \$62k**
- **Local and international sponsors**
- **Community assessment**

**1430 GGs @ = \$87.8m in 2024/25**

**England 3<sup>rd</sup> highest recipient = 107 GGs @ \$4.57m**



# Rotary Peace Centres Fellowship

# Programmes of Scale



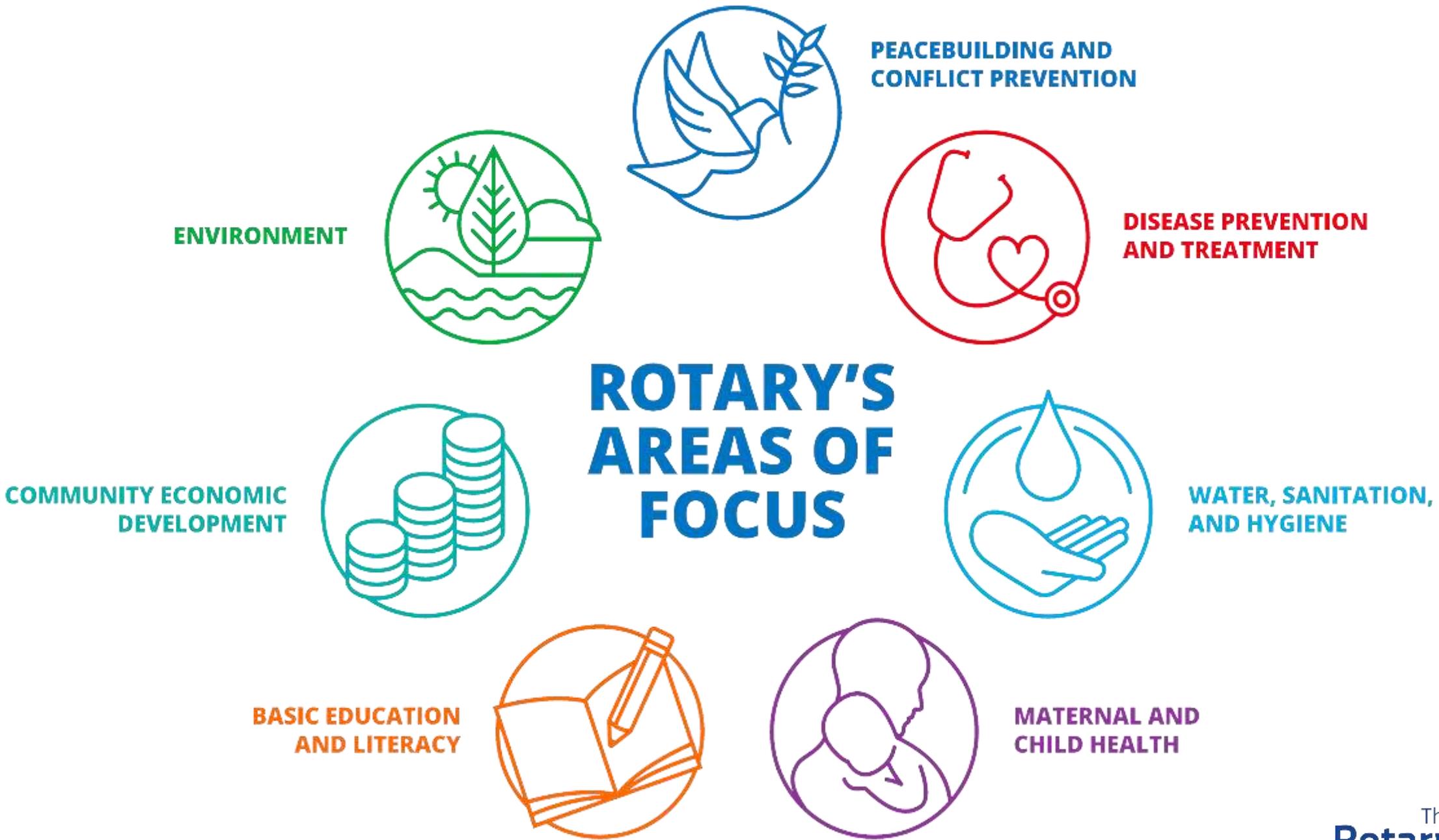
**2025 - Pathways to Peace and Prosperity in Colombia**

**2024 - Partners for Water Access and Better Harvests in India**

**2023 - United to End Cervical Cancer in Egypt**

**2022 - Together for Healthy Families in Nigeria**

**2021 - Partners for a Malaria-Free Zambia,**



# 2024 - 2025 FACTS

**\$406.2m million donations & investments to Foundation in 2024-25**

1,430  
GGs = \$88.7m,  
476 DGs = \$29.4m



39  
Wild Polio  
cases in 2025,  
none since late Oct



74  
Disaster  
Response Grants  
= \$1.9m



131  
Peace  
Fellows =  
\$5.2m



# GLOBAL GRANTS



The Rotary Foundation funds global grants, which support large international activities with sustainable, measurable outcomes in Rotary's areas of focus.

## OUR REACH AND IMPACT



**92%**  
**DISTRICT  
PARTICIPATION**  
FOR PROGRAM YEAR 2022



**100**  
**MILLION**  
**BENEFICIARIES**  
IN THE LAST 5 YEARS\*

# THE IMPACT OF OUR WORK TO ERADICATE POLIO

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**19 million**

CHILDREN AVOIDED PARALYSIS

**1.5 million**

CHILDHOOD DEATHS AVERTED

**3 billion**

CHILDREN VACCINATED

**99.9%**

DECREASE IN POLIO CASES



# RC London Foundation Contributions



## Rotary CLUB FUNDRAISING ANALYSIS FOR JULY THROUGH NOVEMBER (2025-26)

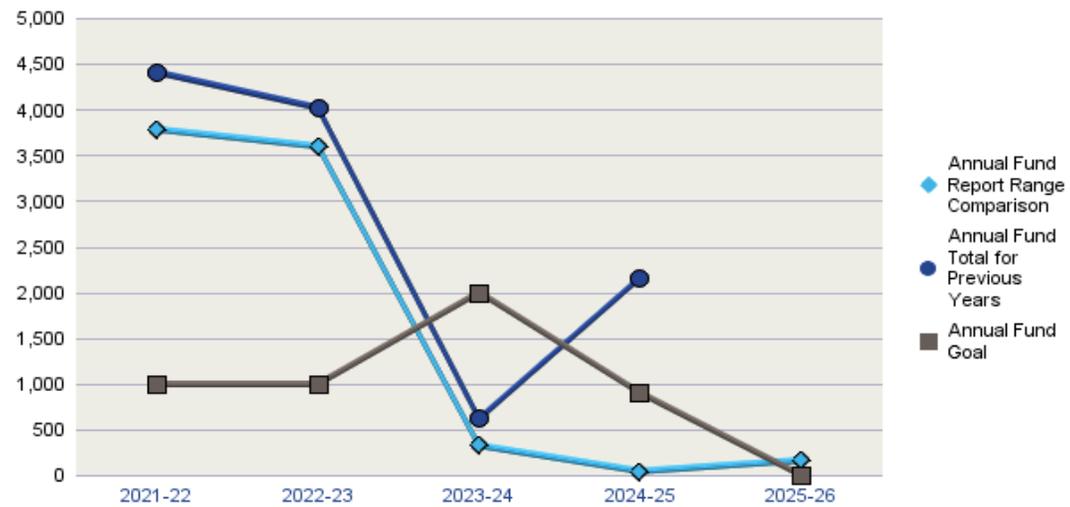
### District 1130

#### Annual Fund Goal

2025-26	\$0
2024-25	\$900
2023-24	\$2,000
2022-23	\$1,000
2021-22	\$1,000

#### Annual Fund Contributions

2025-26	\$163
2024-25	\$2,162
2023-24	\$620
2022-23	\$4,019
2021-22	\$4,405



Annual Fund Report Range Comparison is the Annual Fund giving from 1 July to 30 November for current and previous years

The prior four-year average in Annual Fund giving from July through 30 November is \$1,937. This figure can be used to compare Annual Fund giving for the current Rotary year.

Total Contributions include Annual Fund, PolioPlus, approved Foundation Grants, Other Giving, and Endowment Fund (Permanent Fund) contributions for the reporting period.

### London, Greater London (19532)

#### Total Contributions

2025-26	\$341
2024-25	\$6,226
2023-24	\$3,885
2022-23	\$4,317
2021-22	\$11,039

#### AF Per Capita Club District

2025-26	\$1	\$20
2024-25	\$20	\$55
2023-24	\$5	\$56
2022-23	\$33	\$49
2021-22	\$40	\$80

#### Membership

2025-26	120
2024-25	109
2023-24	125
2022-23	122
2021-22	109

	EREY Members	Sustaining Members	PHS Eligible
2025-26	2	1	0
2024-25	1	1	0
2023-24	3	2	1
2022-23	4	3	1
2021-22	6	5	0

Note: 'EREY Members' reflect the number of donors who contributed some

*The 2025/26 Rotary Year is only 6 months in, so that is why giving is still very low. Out of 1,508 Rotary Clubs in Great Britain, RC London contributions to Foundation of over \$6,200 was the 4<sup>th</sup> highest in District 1130 and 84<sup>th</sup> largest Giving Club in the RGBI region*

*A direct bank payment of £6 per month would secure Sustaining Membership. An increasing number of Foundation Donors are joining the Paul Harris Society @ £60 per month which secures annual contributions of \$1,000.*

# D1130 Foundation Contributions

Club No	Name	Annual Fund	PolioPlus Fund	Other Funds	Endowment Fund	Total Amount	Donors	New Donors
	<b>Total Giving Rotary Year 2024/2025</b>	<b>\$51,104.25</b>	<b>\$16,701.44</b>	<b>\$8,285.65</b>	<b>\$48,832.15</b>	<b>\$124,923.49</b>	<b>197</b>	<b>6</b>
1130	District 1130		\$808.82		\$33,333.33	\$34,142.15	2	0
19489	Dagenham, Greater London				\$8,239.38	\$8,239.38	1	1
89379	Stratford, London, England	\$373.44			\$7,112.77	\$7,486.21	4	0
19472	Barnet, Greater London, England	\$4,917.80	\$1,976.58			\$6,894.38	10	0
19532	London, Greater London, England	\$2,161.70	\$4,064.74			\$6,226.44	4	0
19494	Edgware & Stanmore, Greater London	\$5,331.16	\$25.39			\$5,356.55	19	1
19536	Northwick Park, Greater London	\$2,442.40	\$1,945.20			\$4,387.60	9	1
19471	Barkingside and Redbridge	\$1,421.80	\$2,650.23	\$105.06		\$4,177.09	7	0
19537	Paddington, Greater London, England		\$666.67	\$3,000.00		\$3,666.67	1	0
19500	Epping, Essex, England	\$1,555.72	\$1,809.81		\$146.67	\$3,512.20	7	0
79752	Gants Hill, Redbridge, England		\$312.50	\$3,150.00		\$3,462.50	1	0
19568	Westminster International	\$3,214.32	\$32.59			\$3,246.91	17	0
19542	Putney, Greater London, England	\$2,482.74	\$152.28			\$2,635.02	10	0
19552	Southgate, Greater London, England	\$1,953.73		\$625.00		\$2,578.73	4	0
19538	Dulwich, Peckham and Crystal Palace	\$2,398.02				\$2,398.02	4	0
19570	Westminster West, Greater London	\$2,047.53				\$2,047.53	3	0
19506	Golders Green, Greater London	\$1,766.81	\$213.78			\$1,980.59	8	0
19531	Leytonstone and Woodford	\$1,265.82	\$645.64			\$1,911.46	1	0
222343	London Rotary Passport	\$1,277.32	\$10.42	\$486.33		\$1,774.07	7	0
72555	Enfield Chase, Middlesex, England	\$1,216.54	\$337.84			\$1,554.38	4	0

# Congenital Heart Disease Vietnam



- **1 in 10,000 children born with CHD in Vietnam**
- **85% suffer and die before their 18 birthday**
- **RC Sai Gon Partnership with NGO and HeartBeat Vietnam**
- **GG for \$38,100 in 2023 to cover surgery for 30 CHD Children**
- **Xuan Mai contracted pneumonia and diagnosed with CHD**
- **10.5kg at age 3 – half her recommended weight**
- **Doctors had to perform urgent surgery in July 2023**
- **Viet Govt covered 52% of approx. \$3,500, Rotary donated 48%**
- **One year later Xuan Mai is healthy and started school**
- **2<sup>nd</sup> GG in 2024 for another 60 child surgeries**
- **Family out of poverty trap in 2024**
- **Mental Health of People in local communities enhanced**
- **3<sup>rd</sup> GG approved 2025 for 40 Viet women suffering breast cancer**

# eRanger Motorbike Ambulance Project, Mbale

**Combating the unnecessary deaths of at least 100 pregnant women in Uganda every week -**

**To give heavily pregnant woman and people suffering serious medical incidents in Mbale the dignity of travelling long distances to a health clinic on a well-equipped, fast and safer mode of transport – by ‘Motorbike Ambulance’**

- Partnership with local RC, PONT NGO & Ugandan Health Services
- 49 Clubs in E Mids + 9 private donors Contributed £63,000
- Foundation Global Grant took total to £143,000
- Aim was for 20 Motorbikes – 32 were manufactured
- Local Tata Motor factory has serviced over 12 years for free



# eRanger Motorbike Ambulance Project, Mbale



**One of the most  
successful,  
transparent ongoing  
Foundation Global  
Grants since 2013**

## **Between June 2014 – June 2024**

- Dozens of Drivers trained in basic medical procedures
- Over 45,000 calls out to pregnant women and children and women with snake bites and malaria
- Half of all call-outs have been life-saving
- 31 of the 32 motorbikes still operational with quarterly reports still being recorded for 28 of them
- Death Rate of pregnant women in Mbale has drastically reduced
- Health Authority has now agreed to introduce a fleet of equipped road ambulances

# Global Grants in the UK

**Norwich Marchesi along with the Club of Bangalore Indiranagar, District 3190 successfully applied for Rotary Foundation Global Grant for \$68,600 to install a Brachytherapy system at the Norfolk and Norwich hospital in 2014**

*“In Summer 2024, I finished the month-long course of Radiotherapy, and whilst very time consuming, it went without a hitch causing not too many side effects.*

*I am passionate about The Rotary Foundation and sadly all too often I hear that Rotarians will not support it because all the funds go abroad. Well, this shows that they do not. These funds are there, with international partnerships which can include our very own Wales, Scotland and Ireland, to be used by local Rotary Clubs to benefit our communities. So, if you come across a large problem that needs solving in your area, partner with other Clubs and apply for a Global Grant from the Rotary Foundation”*



Immediate Past DG Ian Grahame District 1080

# Highest Rated Charity

Rated in the top 10 in the world



**Low Administration**  
9% for Administration and Fundraising cost



**Community Assessment**  
Projects based on NEED, not perception



**Sustainability**  
Delivering long term community outcomes



**Rotarian Engagement**  
Planning and technical support



**World Fund Match**  
DDF matched  
The multiplier effect



**Stewardship**  
Strict reporting processes in place



# HIGHEST FOUR STAR RATING SINCE 2008

Charity   
Navigator

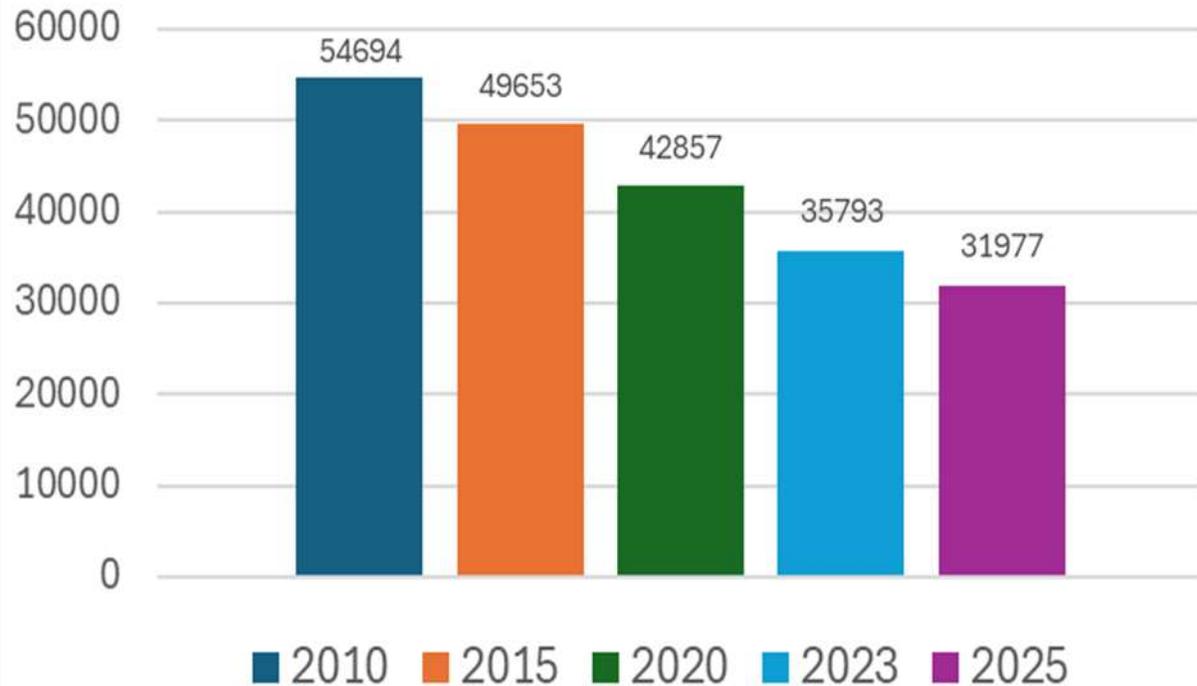
The  
**Rotary**  
Foundation 



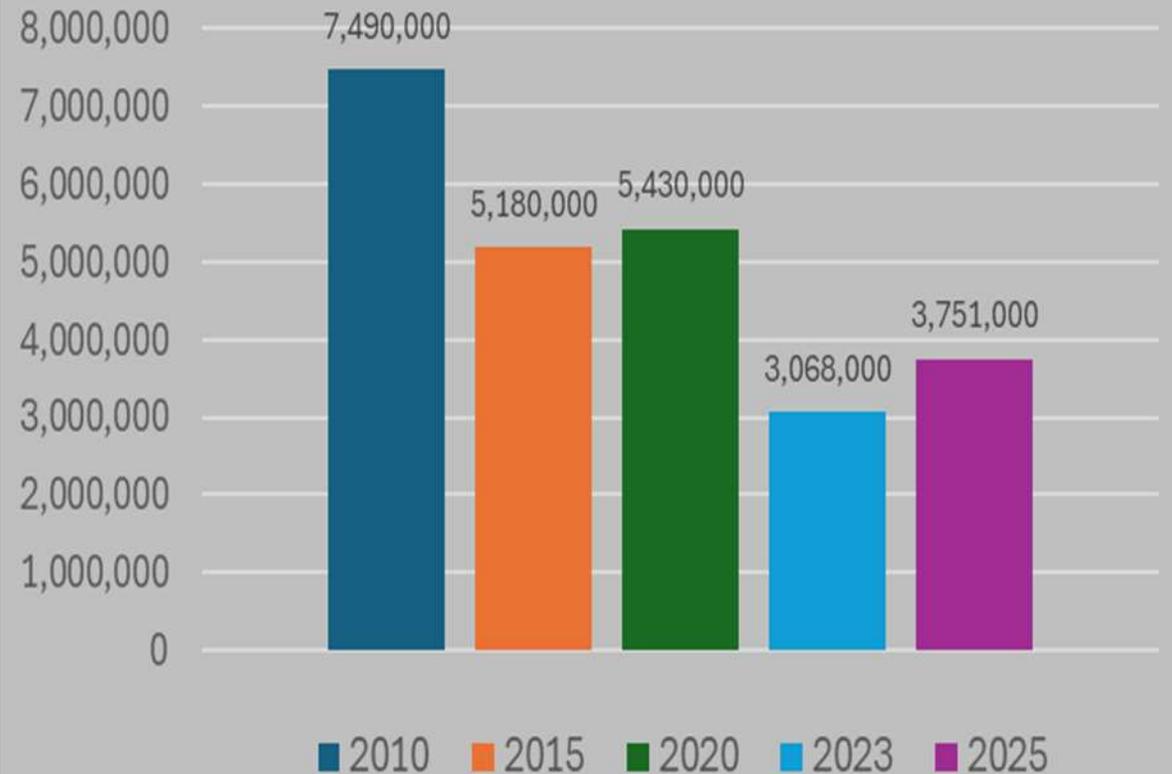
# Overview of Rotary GB&I

The number of Rotary GB&I members has halved since the late 1990s

### Decline in GBI Rotarians



### RGBI Funds Raised - Bouncing Back



# Donor Recognition Program – Recognising Personal Contributions

## Major Donor

Personal cumulative contributions of  
US\$10,000 – MD Level I  
US\$25,000 – MD Level II  
US\$50,000 – MD Level III  
US\$100,000 – MD Level IV

## Arch Klumph Society

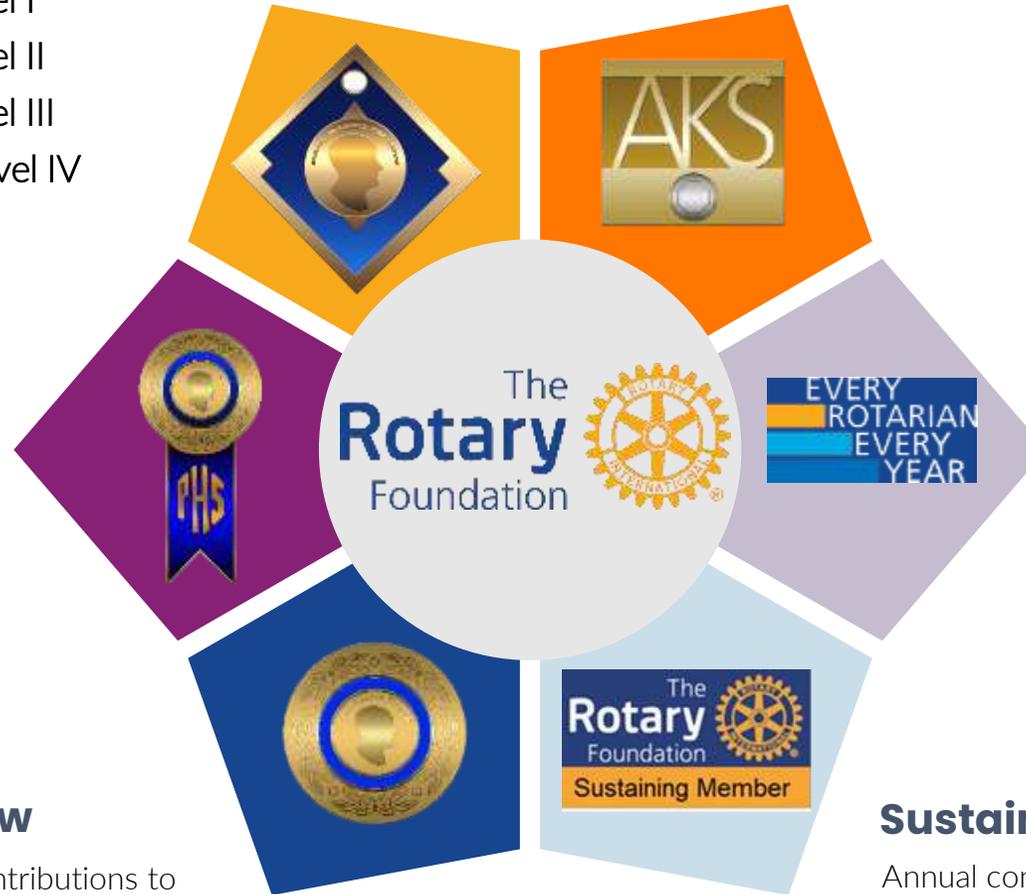
US\$250,000 – MD Level V  
US\$500,000 – MD Level VI

## Paul Harris Society

Annual contribution commitment of  
US\$1,000.

## Paul Harris Fellow

One off, or cumulative contributions to  
US\$1,000



## EREY

Every Rotarian Every Year  
US\$25 to US\$100

## Sustaining Member

Annual contribution of at least US\$100

# Direct Bank Contributions by Individual Rotarians

*giftaid it*

GB£ - US\$ Xchange

BILL & MELINDA  
GATES *foundation*

# Direct Bank Contributions by Individual Rotarians

## **Sustaining Membership \$100 per annum**

**Set up monthly bank payment of £6**

**25% Gift Aid of £1.50 = £7.50**

**Over 12 months = £90**

**Current Exchange Rate takes annual balance  
above \$100 threshold**

# Paul Harris Society @ \$1,000 pa

**Paul Harris Society or  
Benefactor Member  
\$1,000 per annum**

**Set up monthly payment £60**

**25% Gift Aid of £15 = £75**

**Over 12 months = £900**

**Exchange Rate takes balance  
above the \$1,000 threshold**

**After several years of  
contributing, a member will  
surpass the \$10,000 mark and  
become Major Donor**



# Lump Sum Payments

**The Foundation accepts ad-hoc lump sum payments from a Rotarian or a member of the public. For example, a payment £2,000 is worth £2,500 to a Foundation project with 25% Gift Aid added. (This is equal to approx. \$3,000 @ 1.20 exchange rate)**

# Become a Major Donor

**It could be easier than you think to become a Major Donor Level 1 for \$10,000**

**The Donor can make an immediate one-off payment of £6,300**

**+ UK Gift Aid of 25% = £1,575 will take the balance to £7,875**

**+ GB£-US\$ exchange rate currently @ 1.30\* will take the donation to \$10,237.50**

**A donor could pay the £6,300 as a PLEDGE over 3 years –**

**Year 1 = £2,100, Year 2 = £2,100 & Year 3 = £2,100**

**When the first £2,100 payment is received, the Rotarian receives full MD1 recognition**

**Donor may pay Yr 2 & Yr3 @ 24 x £175 per month instead of 2 x £2,100 pa**

# The Arch Klumph Society

**For larger donations such as becoming an AKS Member ....**

**Rather than pay a one-off deposit of \$250,000,**

**a donor could pay the £160,000 over 5 years @ £32,000 / year**

**(ie £32,000 + 25% Gift Aid of £8,000 + 1.25 Exchange Rate\* of £10,000 = \$50,000 pa)**

**Full AKS recognition is awarded after the first £32,000 payment is received**

# BECOME A BEQUEST MEMBER

## Benefactor

US\$1,000 - \$9,000

## Bequest Society

Last Will & Testament

US\$10,000 – Bequest Level I

US\$25,000 – Bequest Level II

US\$50,000 – Bequest Level III

US\$100,000 – Bequest Level IV

US\$250,000 – Bequest Level V

US\$500,000 – Bequest Level VI

## Legacy Society

US\$1million+

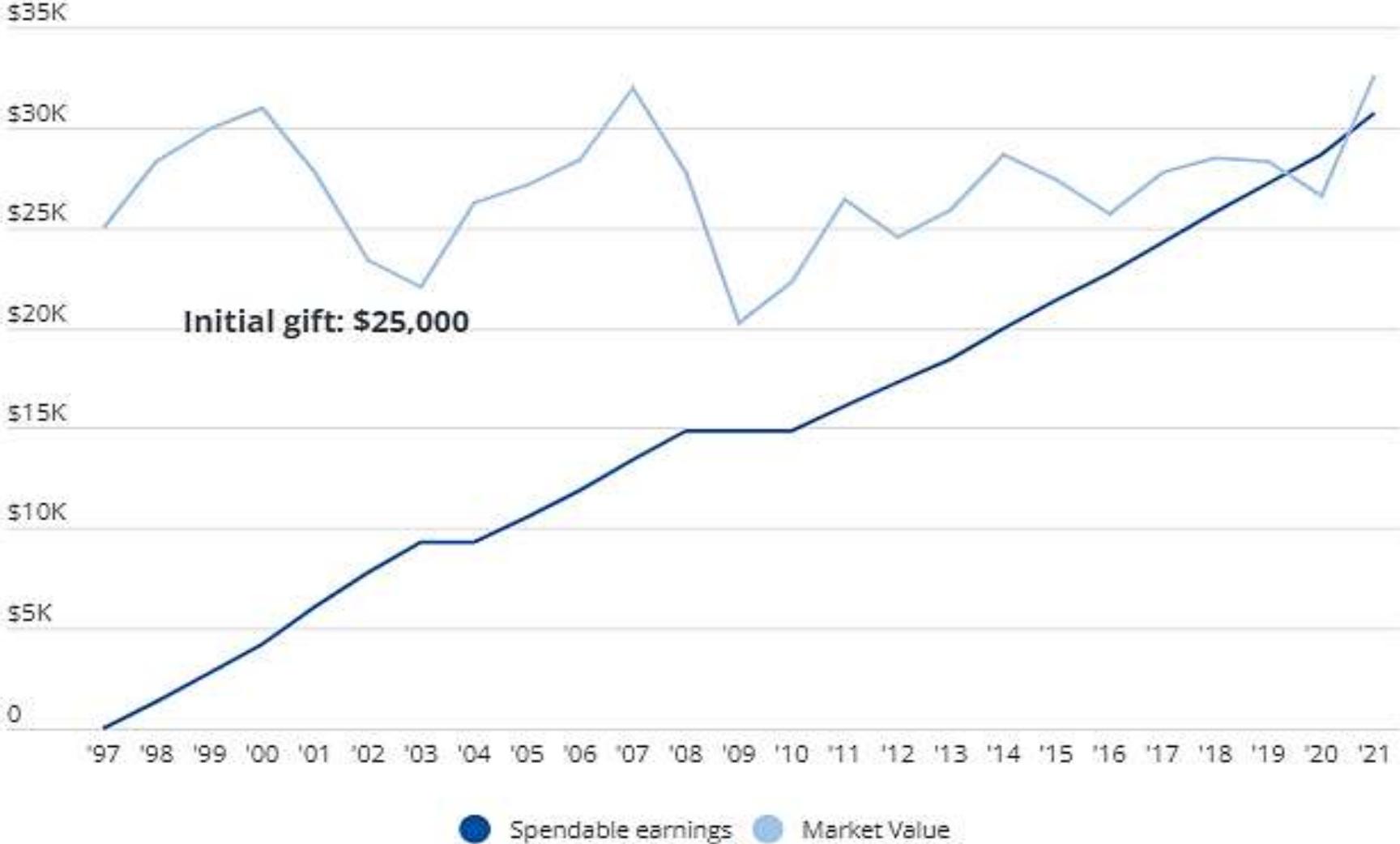
Consider leaving a donation in your Will starting at \$10,000 or increase your current Bequest to a higher Level?

Many Rotarians have benefitted from increases in their house prices and investments in recent decades

A donor bequeathing \$25,000 at Level II can set up an Endowed Fund in their name or the name of a loved one – the donor can choose the Area of Focus and geographical location of the project they wish to support

A donor can have a larger Named Endowed Fund dedicated to different Areas of Focus depending on level of their Bequest

# HOW A \$25,000 BEQUEST SET UP IN 1997 PERFORMED UP UNTIL 2022



**Cumulative spending: \$30,708.68**

**Market value: \$32,619.37**

*When this Rotarian passed to higher service in 1996, her Bequest started paying out quickly and despite some volatility during the dotcom bubble and world recession of 2009, her \$25,000 investment generated an average of \$1,100 per annum to Foundation causes and is worth over \$32,000 in 2023 despite the effect of Covid. The Bequest will continue to provide for Foundation causes in Asia in perpetuity*

# \$25,000 NAMED ENDOWED FUND PERFORMANCE 1994 – 2023



*In the last 30 years, the investments on this Bequest to Rotary Foundation has paid out almost \$60,000 to the District in which the Donor lived – that's almost \$2,000 pa for local charities, helping thousands of people in his local community*

# Club Donation to Endowment

**Rotary Club of London Endowed Fund for Community Projects in D1130**

**Rotary Club of London Endowed Fund for Maternal & Child Health in Malawi**

**More Rotary Clubs are contributing some of their Reserves/Funds to the Foundation Endowment. This will create an annual return for Rotary projects or D1130 Projects.**

**A \$50,000 (c. £38,000) Endowed Fund will secure an income of around \$4,000 pa to the Club's Endowed Fund for many generations, possibly hundreds of years**

# Charitable Legacy

## Rotary Foundation of the United Kingdom RFUK (Reg Charity No 1002059)

- Estate Planning – Unique Position for UK tax-payers including Rotarians
- If a Rotarian leave at least 10% of net Estate to Charity such as RFUK
- Inheritance Tax reduced from 40% to 36% on balance of taxable estate

Example: A Rotarian leaves a net estate of £500,000.

- They bequeath 10% of net estate (£50,000) to Rotary Foundation UK for a Named Endowed Fund in their perpetual legacy
- Therefore, instead of a 40% tax liability on the net £500,000 estate (= £200,000), inheritance tax will be paid on the remaining £450,000 @ 36% (= the children receive £288,000)
- So, Rotary Foundation UK will receive the £50,000 which is remaining £12,000 from the estate and £38,000 from the Government
- The children will receive an annual report showing the success of their parents' Endowed Fund