



## ARIZONA ROTARY LEADERSHIP ACADEMY

### “UNDERSTANDING & UTILIZING THE ROTARY FOUNDATION”

#### CHAPTER ONE HISTORY and ORGANIZATION OF THE ROTARY FOUNDATION

Your Rotary Foundation celebrated its centennial in June 2017 at the Rotary International Convention in Atlanta.

The first 100 years of the Foundation are chronicled in David Forward’s excellent book *Doing Good in the World – The Inspiring Story of The Rotary Foundation’s First 100 Years*. If you have a great interest in the Foundation, you will want a copy of this book.

On the other hand, if you just need a summary, you can read Chapter 10 of Forward’s earlier book, *A Century of Service – The Story of Rotary International*. For your convenience, this chapter is copied below.

The Rotary Foundation helps fund our humanitarian activities, from local service projects to global initiatives. Your club or district 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 (visit [www.endpolio.org](http://www.endpolio.org)) and [promoting peace](#). Rotarians and friends of Rotary support the Foundation’s work through voluntary [contributions](#).

Our Foundation is governed by 15 Trustees. [The Board of Trustees](#) manages the business of the Foundation. The Rotary International president-elect nominates the trustees, who are elected by the [Rotary International Board of Directors](#). The trustee chair serves for one year and trustees serve for four years.

It is the responsibility of the Trustees to:

- Hold, invest and manage all the Foundation’s funds and property.
- Administer all programs, projects and activities of the Foundation.
- Raise funds and establish policies for the manner in which contributions may be received.
- Provide appropriate forms of recognition of the Rotarians, Rotary clubs, and others who support the Foundation.
- Promote The Rotary Foundation and inform the public accurately and persuasively about its activities.
- Assume primary responsibility for developing and initiating new Foundation programs.

Closer to home and more accessible to you are resources in your own district and in Zone 26. I encourage you to get to know the Chair of your District Rotary Foundation Committee.

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## Chapter 10 - Foundation of Hope, from *A Century of Service*

**Note: This is a history. Some of the material is not current.**

It was all Arch Klumph's idea. As RI president in 1917, he told delegates to the Atlanta convention, "Carrying on as we are, a miscellaneous community service, it seems eminently proper that we should accept endowments for the purpose of doing good in the world." <sup>1</sup> It was hardly a stirring call to action or a motivational moment for those present. But it was the first pebble in what would later become a landslide of support that would improve millions of lives. And as happened so many times before in Rotary, it began in the mind of one man. That man—Arch Klumph—was a remarkable fellow. Born into a poor family in Conneautville, Pennsylvania, USA, in 1869, Klumph moved with his parents and two brothers to Cleveland, Ohio, while he was a child. To supplement the family's income, he left school at age 12 and went to work. At 16, he became office boy for the Cuyahoga Lumber Company. At his own initiative, he enrolled in night school; after a hard day's work, he would walk four miles each way to school to save the tram fare. When the business began to fail, Cuyahoga Lumber made Klumph manager. He turned the company around and made it one of the most profitable firms of its type in the Midwest. He subsequently bought the company. Eventually, the self-educated former office boy became president or vice president of several other business enterprises, including a bank and a steamship line. When he was 18, Klumph taught himself the flute and three years later had so mastered the instrument that he became a flutist with the Cleveland Symphony Orchestra. He continued to play for the symphony for 14 years.

In 1911, Klumph became a charter member of the Rotary Club of Cleveland with the classification of "lumber—wholesale and retail." His Rotary path followed his brilliant business and personal record of accomplishments. Arch became club president in 1912 and president of the International Association of Rotary Clubs for 1916-17. In his final address as club president, Klumph suggested "an emergency fund should be built up which will enable the club in future years to do many things." He went on to become chairman of the committee that wrote the new constitution for Rotary International, and it was his idea to divide Rotary into districts, create the office of district governor, and establish the annual district conference. But he never forgot his concept of a fund to expand the good works of Rotary.

The Rotary Endowment Fund, as it was called at first, came to Klumph as "a vision, a little inspiration all of a sudden one day that the organization was peculiarly adapted to the purpose of accepting endowments to do great things." The RI Board approved his idea but did not provide a mechanism to fund it. Indeed, for the next decade, Rotary's leaders went along with Klumph's proposal, but without any tangible action or enthusiasm. As Klumph's presidential term wound down, the Rotary Club of Kansas City, Missouri, collected contributions for a gift for the retiring association president. When the club closed out that account, they discovered a surplus of \$26.50 and decided to donate that money to start the Rotary Endowment Fund. The first seeds had been sown for the fund known today as The Rotary Foundation of RI.

Over the next several years, Klumph pressed the association to activate the endowment fund to help develop new Rotary clubs and provide humanitarian relief. But

after six years, the fund balance stagnated at a paltry \$700. In 1928, delegates to the Minneapolis convention changed the fund's name to The Rotary Foundation. This change in the RI Constitution stipulated that a board of five trustees—all past RI presidents—should govern the new Foundation and that funds should be kept separately from the parent organization. Contributions started to come in; four years later, there was \$50,000 in the bank.

After the stock market crash of 1929, donations to good causes dried up. It was then that Paul Harris asked The Rotary Foundation to make its first donation; and it sent a \$500 check to the International Society for Crippled Children, whose own work had begun in 1919 as the inspiration of Rotarian Edgar F. "Daddy" Allen of Elyria, Ohio, USA.

The 1937 RI Board announced plans for a \$2 million fundraising goal for The Rotary Foundation, and it looked as if Arch Klumph's vision would finally be realized. The outbreak of World War II dashed those hopes again, but the tragedy of war made Rotarians reflect more seriously on the Foundation's potential for peacemaking. Ches Perry, who had retired as general secretary in 1942, used the pseudonym Perry Reynolds to pen an April 1944 article in *The Rotarian* urging members to donate to the Foundation in addition to their normal Rotary dues. "An additional contribution of \$5 a year by each Rotarian for the next two years would give Rotary International an endowment of two million dollars and make its Foundation an instrument of great good in the postwar period," he reasoned.

When the war ended in 1945, Rotary rewrote its objectives for The Rotary Foundation:

1. The promotion of Rotary Foundation Fellowships for advanced study;
2. The fostering of any tangible and effective projects which have as their purpose the furthering of better understanding and friendly relations between the peoples of different nations; and
3. The providing of emergency relief for Rotarians and their families wherever war or other disaster has brought general destruction and suffering."<sup>5</sup>

In 1947, when Paul Harris died, RI asked that individuals and clubs wishing to honor the founder make gifts in his name to The Rotary Foundation, suggesting \$10 per member. Money poured in from all over the world. Thus, in the first year after Harris's death, the Foundation granted 18 Rotary Foundation Fellowships—later called Ambassadorial Scholarships - for one year's university study abroad. By 1948, contributions had exceeded \$1,775,000; in addition to granting study fellowships to 37 students from 12 countries,

The Rotary Foundation allocated \$15,000 for war-relief assistance to 150 families. By 1954, the Foundation had collected \$3.5 million—and new contributions reached \$500,000 in a single year. In 1955, Rotary's 50th anniversary year, it awarded scholarships to 494 young men and women from 57 countries. The Rotary Foundation had quickly become the successful program that Arch Klumph had long predicted. In 1956, the RI Board urged clubs to give further emphasis to the Foundation during The Rotary Foundation Week, which they decreed be held in mid-November each year. The Secretariat suggested that clubs and districts plan programs publicizing the Foundation during that week, and their efforts were so successful that in 1982 the Trustees changed it to The Rotary Foundation Month, still observed every November. This ongoing desire to honor Rotary's founder by making gifts to the Foundation spurred one

of the most significant ideas in its history. By 1957, a decade after Paul's death, donations had begun to decline. The Trustees announced that anyone who contributed \$1,000 to The Rotary Foundation would become a Paul Harris Fellow. Paul Harris Fellows were presented with a plaque, medallion, and lapel pin, all bearing the founder's likeness. In 1968, the Trustees added a category called Sustaining Member for those who could not give the entire \$1,000 at one time but pledged to give \$100 annually. When they attained the \$1,000, they became Paul Harris Fellows. Allison G. Brush, a past RI director from Laurel, Mississippi, USA, was the first Paul Harris Fellow. The second was Rufus F. Chapin, one of the 1905 Chicago members who became the longtime treasurer of Rotary International.

By 1984 there were 100,000 Paul Harris Fellows, a number that swelled to 250,000 in 1989 and 500,000 by 1995.

### **Ambassadorial Scholarships**

The Rotary Foundation's Ambassadorial Scholarships program is the world's largest privately funded international scholarship program for university studies. Its purpose is to promote further international understanding and friendly relations between people of all nations—the first step to a peaceful world. The graduate- and undergraduate-level scholars are proposed by local Rotary clubs and selected by their district. Ambassadorial Scholars have two priorities: first, to be ambassadors for Rotary between their home and study countries by sharing with others the culture in their host country, and second, to successfully complete their academic course of study.

Some of the world's most distinguished leaders are alumni of the Rotary scholarship program, including: Ambassador Otto Borch of Denmark; the late Carlos Alberto da Mota Pinto, prime minister of Portugal; Sadako Ogata, the former UN high commissioner for refugees; Bill Moyers, prominent television journalist and former deputy director of the U.S. Peace Corps; Paul A. Volcker, professor, economist, and former chairman of the U.S. Federal Reserve Bank; Sir William Dean, last governor of the Commonwealth of Australia; Philip Lader, former U.S. ambassador to Great Britain; and renowned pianist Van Cliburn, winner of the first Tchaikovsky International Piano Competition in Moscow.

In 1971, the Trustees enhanced the Ambassadorial Scholarships program by adding a special program to fund teachers of the mentally, physically, and educationally impaired. Since 1994, The Rotary Foundation has included three new types of awards: a Multi-Year Ambassadorial Scholarship for two years of study abroad; the Cultural Ambassadorial Scholarship, which provides for intensive language or cultural study in another country for three to six months; and the Japan Ambassadorial Scholarship, which provides for intensive Japanese language study and an internship in Japan for 12 months.

Over the years, Rotarians have been justifiably proud of their Ambassadorial Scholarships program but also puzzled why it is often eclipsed by other foundations that send fewer students abroad and spend much less money. The Rotary Foundation invests about \$20,000 in each scholar. In 1991, Rotary commissioned a study by the Institute of International Education (IIE) to evaluate the effectiveness of The Rotary Foundation's scholarship program.

Some findings were:

- “The Rotary program compares favorably to its peers in the international scholarship community.” IIE compared it to the scholarships offered by the Rhodes, Fulbright, Marshall, Luce, American Association of University Women, and American Scandinavian foundations.
- “It is far too little known in the field ... considering Rotary’s size, years of existence, and general level of excellence.”
- “There is enormous gratitude to Rotary [by scholars] for what most believe to be the most significant experience of their lives.”
- “The Rotary program as it now exists achieves rather well what it set out to do.”

### **Group Study Exchange (GSE)**

The first Group Study Exchange (GSE) teams were organized in 1965 between districts in California and Japan. The program was such a success that it quickly spread around the world. A district selects a Rotarian as team leader and then four to six men and women aged 25-40 who are not Rotarians but who would make excellent goodwill ambassadors. The Rotary Foundation then matches that team with a district in another country and pays all the travel expenses. For four to six weeks, the host district takes the visiting team to points of interest and arranges for them to visit schools, courts, civic leaders, businesses—and Rotary clubs. They live in Rotarians’ homes, dine together, exchange family photographs, and visit those in the same trade or profession as their own. The role reversal, where the host district sends its own team out, has occurred at various times, either in the same or succeeding year. There are some 46,000 GSE alumni.

The precursor and model for GSE may well have sprouted in New Zealand. The New Zealand ROTA (Rotary Overseas Travel Award) Program was operating from 1955 with two-month study tours by teams of six young professional and business men and a Rotarian leader. Visits (in odd-numbered years) were to the United Kingdom, United States, Ceylon (Sri Lanka), India, Japan, Indonesia, Malaysia, and Singapore. In even-numbered years, reciprocal visits were to New Zealand. The program continued until GSE became an activity of The Rotary Foundation. GSE has sent specialized teams, such as all-women or same-vocation teams. One such example was an exchange between Boulder County, Colorado, USA, and Melbourne, Victoria, Australia. At that time, Boulder had the highest teen suicide rate in the country, and Melbourne was the world’s suicide capital. The teams were composed exclusively of youth workers who explored new approaches to the problem of teen suicide. “We returned home energized with new perspectives and new ideas,” said Stuart Williams, the team leader and past president of the Rotary Club of Forest Hill, Victoria, Australia. Group Study Exchange has become one of the Foundation’s most popular and successful programs. It helps people from different countries better understand one another and realize the dreams and aspirations they share. In this way, GSE was a vital instrument in Rotary’s commitment to world understanding and peace.

### **Matching Grants**

By the 1960s, jet travel had made the world a smaller place. More Rotarians met one another at international meetings and explored ways in which clubs and districts in

different countries could work together on projects. The Foundation established Special Grants (later called Matching Grants) in 1965 as a way of leveraging the Foundation's funds while simultaneously increasing participation among Rotarians and clubs. Suddenly, Rotary clubs in two or more countries could partner with one another in a World Community Service project and apply to The Rotary Foundation for funds to match what they raised locally. Foundation Matching Grants have been given for as much as US\$150,000 for groups of Rotarians from different backgrounds and cultures to come together and drill irrigation wells, establish "revolving loans" that lead to the self-development of people in impoverished villages, purchase agricultural equipment, and fund teacher training and ambulances. Matching Grants are not blank checks sent out to good causes. They require the active involvement and oversight of Rotarians from a club where the project is located and by an international partner.

r. David Buckley is an Irishman who spent two years as a medical volunteer in the Turkana Desert, a remote region of northern Kenya. He knew firsthand how the villagers suffered and often died for lack of modern medical facilities. Pregnant women were especially at risk and often lost their babies and their own lives during childbirth. When Buckley's term ended, he returned to Ireland and shortly thereafter joined the Rotary Club of Tralee. When he learned about The Rotary Foundation's Matching Grant program, Buckley's club and a partner club in Kenya put together a proposal to obtain and equip an all-terrain vehicle that could serve as a mobile medical clinic and ambulance. His club members contributed \$942 toward the project and their fundraising event brought in another \$8,684. District 1160, the Tralee club's home district, added \$1,500 from its District Designated Fund (DDF).

This all totaled \$11,126, and the club then successfully applied to The Rotary Foundation for a Matching Grant of \$11,126. Thus a small Irish Rotary club leveraged its own relatively modest contribution into a \$22,252 project that is providing modern health care to 40,000 women in remote African villages. In Korea, clubs in District 3640 teamed up with District 2810 in Japan, and each raised \$10,000 for a project to provide free meals to 546 primary school pupils in a poor district of Seoul. The Foundation then matched their contributions with another \$20,000, and the two countries—though for centuries bitter enemies—together fed needy children for seven months.

### **Health, Hunger and Humanity (3-H) Grants**

The Health, Hunger and Humanity (3-H) Grants program was the brainchild of 1978-79 RI President Clem (now Sir Clem) Renouf of Australia, though he credits the program's early success to his immediate predecessor, W. Jack Davis of Bermuda. While president in 1977-78, Davis wanted to involve more Rotarians in humanitarian work and to involve RI in the mass immunization of children; he was an early and influential advocate for getting 3-H on the Rotary agenda. In 1978, the Trustees launched 3-H Grants with the objective "To improve health, hunger, and enhance human, cultural, and social development among peoples of the world."<sup>10</sup> 3-H Grants cover a broad spectrum of projects that are integrated and provide sustainable development. 3-H Grants generally range in size from US\$100,000 to \$300,000. The funding for the 3-H program initially came from the 75th Anniversary Fund, in support of which Rotarians were asked to contribute \$15 per capita. The first 3-H Grant in 1978 helped immunize 6.3 million

children in the Philippines against polio—the project that evolved into PolioPlus, which is discussed in chapter 20.

Another health grant in the Philippines provided medical equipment for three hospitals, along with 75 biomedical technicians who trained local personnel how to use and repair the equipment. This project had a nationwide impact on health-care education and patient diagnosis and treatment. A third 3-H project improved the income and quality of life in an entire community. The Rotary club in the poor region of Arusha, Tanzania, partnered with the Rotary Club of Guelph, Ontario, Canada, and obtained a 3-H Grant to equip a health center, provide vocational training for leprosy victims and street children, improve farming methods, and install a hydrogenerator to produce potable water. In Costa Rica, the Rotary Club of San Jose used a 3-H Grant to create a buffer zone around a protected rain forest. It provided training for alternative farming methods for residents of four communities located near the rain forest, along with a community credit fund for revolving loan funds.

Bangladesh is one of the poorest countries on earth and has one of the lowest literacy rates. Rotarians in Bangladesh and Australia saw a perfect opportunity for aid from The Rotary Foundation. Their \$500,000 Health, Hunger and Humanity Grant helped them introduce a literacy and numeracy program that their fellow Rotarians, led by Australian Past District Governor Dr. Dick Walker, had successfully implemented in Thailand a few years earlier. 11 After a two-year test in 33 schools, the program was expanded nationwide as a five-year program. In the first three years, literacy rates rose from 26 percent to 55 percent.

**The 3-H grants were phased out 3 years old with the beginning of the Future Vision Pilot program.**

Individual Grants (formerly Rotary Volunteers Grants) cover the travel costs for a Rotarian to work on a World Community Service project in another country. Thus, a British educator could teach students in Madagascar how to use solar-powered radios, an Indian engineer could assist flood victims in Mozambique, and a Rotarian physician from Spain could teach physical therapists in Paraguay.

### **The *SHARE* System**

The Rotary Foundation raises more than millions of dollars in its annual fundraising for educational, humanitarian, and cultural exchange programs. This money comes from the Rotary clubs and districts around the world. The *SHARE* system was devised in the early 1990s to allocate a portion of the funds raised to the Foundation's World Fund. The balance is credited to the District Designated Fund. Districts that contribute to The Rotary Foundation have discretion over how some of those funds are spent. Thus, districts whose clubs give large amounts to the Foundation are allotted more Ambassadorial Scholarships than those that give less. Through District Designated Fund allocations, the district receives credits for a percentage of its donations to the Foundation.

**“Let there be peace on earth ... ”**

When the New Horizons Committee met in 1982 to chart a strategic long-term plan for Rotary, it adopted an idea suggested by the World Understanding and Peace

Committee to initiate Rotary Peace Forums. These conclaves began convening twice annually in various world cities under the auspices of the Foundation. The Trustees soon changed the name to the Rotary Peace Program, and so began the series of educational seminars focused on such issues as the environment, economic development, conflict resolution, and peacemaking.

As the 21st century dawned, Rotarians realized that their commitment to Rotary Centers for International Studies in peace and conflict resolution. The Rotary Centers offer individuals who are committed to peace and cooperation the opportunity to pursue a fully funded, two-year master's-level degree or certificate in a field such as international studies, peace studies, or conflict resolution.

To implement the academic programs, Rotary has partnered with the Universidad del Salvador (Buenos Aires, Argentina), University of Queensland (Brisbane, Australia), University of Bradford (West Yorkshire, England), Sciences Po (Paris, France), International Christian University (Tokyo, Japan), University of California, Berkeley (California, USA), and University of North Carolina at Chapel Hill and Duke University (North Carolina, USA).

The first class in 2002 included 70 scholars from 35 countries, most of whom spoke at least three languages. Starting in 2004 and every year thereafter, 70 young men and women will graduate with the philosophy, education, and practical tools needed to effectively influence future international relations, working for organizations such as the United Nations, European Union, and World Bank, their government's diplomatic corps, and nongovernmental organizations and multinational corporations. In a decade, 700 people will be working in positions of influence, each trained and committed to reduce conflict and resolve disputes peacefully.

The Rotary Foundation's accomplishments are impressive. Nearly 38,000 scholars from 110 countries have received Ambassadorial Scholarships valued at US\$429 million. More than 46,000 people have participated in 10,600 Group Study Exchange teams at a cost of more than \$82 million, and 18,000 Matching Grant projects in 166 countries have been funded at a cost of more than \$182 million. Through PolioPlus, Rotary has committed more than \$650 million to global polio eradication efforts.

Since 1947, Rotarians have contributed more than \$1.4 billion to the Foundation, with total contributions averaging more than \$85 million annually. There are more than 1,000,000 Paul Harris Fellows, and new fellows are being added at a rate of 45,000 per year. The Rotary Foundation spends about \$100 million annually on its programs and since 1917 has funded \$1.4 billion in program awards and expenses—yet still maintains net assets of almost \$500 million.

The endowment dreamed up by Arch Klumph has become a reality. The Permanent Fund Initiative (PFI) was created in 1992 with the purpose of providing an ever-increasing stream of revenue to secure the future of the Foundation's programs. An organized structure of PFI advisers and district leaders identified hundreds of generous major donors who brought the fund to \$500 million by 2006, well on its way to its initial target of \$1 billion. + "What we do is touch other people ... open the horizon to them ... say 'You matter.' You see, the five men who chose me to become a Rotary Ambassadorial Scholar are gone ... but they're not. They never will be. Because along the way, I will in my own way share with others—and have—what those five men and

the 60 members of the Marshall (Texas) Rotary and the tens of thousands of other members of Rotary did in 1956 when they said, 'Bill Moyers, you can matter. '"

But statistics tell only a part of The Rotary Foundation story. Like Rotary itself, The Rotary Foundation is not about money; it is about people. It is about the people who donate to their Foundation, and the joy they feel from the act of giving. Some donate because they seek the honor of becoming a Paul Harris Fellow. Others give but request that the recognition be conferred on someone else: a parent, mentor, local volunteer, or worthy citizen. Mother Teresa, Nelson Mandela, Kofi Annan, King Baudouin of Belgium, President Habib Bourguiba of Tunisia, President Vaclav Havel of the Czech Republic, Prince Charles of England, Indira Gandhi, Israel's Yitzhak Rabin, Luciano Pavarotti, King Hussein of Jordan, the Aga Khan, Pope John Paul II, and hundreds of other celebrated personalities were named Paul Harris Fellows. But so have thousands whose names few of us would recognize: the woman who feeds the homeless, the beloved local teacher, the counselor at the AIDS clinic. To donor and recipient alike, the presentation of Paul Harris Fellow Recognition is an honor and a privilege.

The Foundation is also a story about the people who benefit from these gifts. When a Rotarian in Turkey is named a Paul Harris Fellow, the \$1,000 he gives to The Rotary Foundation funds enough textbooks to educate 2,000 children in a school in Papua New Guinea. When the Rotarian in Finland makes a gift to the Foundation in honor of the doctor who saved her daughter's life, she is providing a better life for women in Nicaragua, who receive \$50 microloans enabling them to start a craft business to support their families. A \$1,000 gift will provide enough money to help with the travel costs for Texas Rotarians who sacrifice a month of their lives as volunteers in Poland to teach ethical commercial practices to business students.

It buys the polio vaccine for 2,000 babies in Nigeria, while prompting tens of thousands of Rotarians to mobilize the immunization campaign. The Foundation is the story of those mothers who can now see their children for the first time. It is the story of the land-mine victim who can now wheel himself to a table and work in a job that restores his dignity.

The Rotary Foundation has been so effective because it matches money with people. In the words of Arch Klumph: "Money alone does little good. Individual service is helpless without money. The two together can be a Godsend to civilization."

Writing to Klumph in 1934, Paul Harris mused: "I have a feeling that we shall some day suddenly, and perhaps without any particular effort on our part other than the effort which you have been giving the movement for years, find ourselves with something of real importance." The words, penned at a time when support for The Rotary Foundation was scarce, were prescient indeed. Klumph died in 1951, when The Rotary Foundation was already becoming a significant force for good. But could even Arch Klumph have imagined the immense reach and scope of the idea he considered "a little inspiration"?