

# The Rotary Foundation of Rotary International

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## Humanitarian Grants Program

*District Simplified Grants*

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

*Matching Grants*

*Volunteer Service Grants*

Annual Report on Operations  
**2007-08**



October 2008



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## Overview of Grants Awarded in the 2007-08 Rotary Year

Grant Type	Number of Grants Awarded	Total Grant Awards (US\$)
<b>District Simplified Grants</b>	<b>389</b>	<b>\$6,811,589</b>
<b>Health, Hunger and Humanity (3-H) Grants</b>	<b>19</b>	<b>\$5,162,302*</b>
<b>Matching Grants</b>	<b>2,424</b>	<b>\$27,594,432**</b>
<b>Volunteer Service Grants</b>	<b>227</b>	<b>\$1,170,000</b>
<b>TOTAL</b>	<b>3,059</b>	<b>\$40,738,323</b>

\* District Designated Fund contributions used for 3-H grants totaled \$172,275.

\*\* District Designated Fund awards for Matching Grants were \$17,060,137 for a total award amount of \$44,654,569.

Note: The numbers in the chart reflect total program awards for the year. All figures are reported in U.S. dollars. Any discrepancies with the numbers found in The Rotary Foundation Fact Card are because the Fact Card totals for each program include District Designated Fund contributions, credits for cancelled grants, and reductions in expenditures for grant funds that have been returned to the program budget. The Annual Report on Operations figures are not audited.

## **Executive Summary**

2007-08 was another busy year in Humanitarian Grants, bringing with it tremendous growth. At any given time during the past year, TRF managed nearly 6,000 open humanitarian grants, representing over US\$170 million in TRF funding and sponsor contributions. This level of activity brings with it wonderful opportunities for improving the lives of needy people worldwide. Below are some highlights from the year.

### **Matching Grant Trends**

Matching Grants experienced a great deal of growth during 2007-08. The number of Matching Grants approved increased by 21% from the previous year, and the total amount of grant awards increased 26%. Continuing an upward trend established over the past five years, the average grant award amount increased 4% from the previous year. Additional Matching Grants statistics can be found on page 9 of this report.

### **Humanitarian Grants District Support Forum**

On 1 July 2007, TRF launched the Humanitarian Grants District Support Forum. This online forum, available via Member Access, provides information and resources to district leaders that work most closely with Humanitarian Grants — district governors, district governors-elect, district Rotary Foundation committee chairs, and district grants subcommittee chairs. The forum contains news and calendar items, a wide array of Humanitarian Grants-specific downloads, instructions on how to obtain grant activity reports, a discussion section, photos, and much more.

### **Phased-out Grants**

At the beginning of the 2007-08 Rotary year, eight phased-out grants remained open — one Community Assistance Program Grant and seven Individual Grants. Through the course of the year, all of these grants were closed.

### **Blane Community Immunization Grants**

On 1 January 2000, TRF launched Blane Community Immunization Grants. These grants provided up to \$1,000 in matching funds to Rotary clubs in the United States to help them improve immunization levels in their communities. While Blane Grants brought tremendous help to thousands of people in need, the Trustees of The Rotary Foundation brought this program to an end on 31 December 2007. During the past eight years, TRF approved 381 Blane Community Immunization Grants with a total award amount of \$490,125.

### **Disaster Recovery**

During 2007-08, TRF administered the Solidarity in South Asia (SSA) fund and three Disaster Recovery sub-accounts: Hurricanes Stan and Wilma (Mexico and Guatemala), Hurricane Wilma (USA), and the Earthquake in India and Pakistan. No new Disaster Recovery accounts were opened in 2007-08. In 2007-08, approximately \$993,953 was paid to the SSA Committees and \$200,000 was paid to the Disaster Recovery Committee in Mexico to implement projects in the disaster affected areas. As of 30 June 2008, all SSA funds have been distributed to their respective committees.

## Stewardship

Stewardship played a pivotal role in many of the activities taking place in the Humanitarian Grants Program Division during the 2007-08 Rotary year. As participation in Humanitarian Grants has increased over the years, so have issues related to reporting and stewardship of grant funds.

### Stewardship Seminars

In the 2007-08 Rotary year, two stewardship seminars were held. While past seminars focused solely on grant management, these stewardship seminars broadened their focus to include best practices of grant implementation. A seminar was conducted in RI District 3260 (India) for all member clubs, and a seminar intended for district leaders was conducted in Los Angeles, in conjunction with the International Convention. Topics covered during the seminars included creating a viable application, cultivating and sustaining partnerships and communication, raising and spending TRF funds, accounting practices, and reporting.

### Humanitarian Grants Cadre of Technical Advisers

The Humanitarian Grants Cadre of Technical Advisers, or the Cadre, is made up of Rotarians who volunteer to help evaluate and assess grant projects based on their professional expertise. There are over 250 Cadre members who visit and review grant projects throughout the world. During the 2007-08 Rotary year, Cadre members conducted approximately 72 site visits and 75 technical reviews. In August 2007, seven Technical Coordinators and the Cadre Chair attended training in Evanston.

### World Reporting

In April 2006, the Trustees created a world reporting initiative to ensure adequate and timely reporting of all grant funds. This policy created a process to conduct semiannual analyses for grant reporting in all districts. While the goal is for each district to achieve 100% compliance, all districts are required to meet a minimum compliance level of 70%. Districts that are found not to be in compliance for two consecutive periods may be suspended from participation in all Humanitarian Grants.

In October 2007, the overall compliance rate was 78%. By April 2008, this rate increased to 84%. Because of the overall improvement, the Trustees decided to make a one-time exception to this policy at their April 2008 meeting and suspend districts that were below 70% reporting compliance for three consecutive analyses. Consequently, six districts were suspended. By 30 June 2008, two districts had already brought their reporting levels above 90% so their suspensions were lifted.

At their April 2008 meeting, the Trustees also revised the World Reporting policy slightly. If a district is less than 70% current and compliant *and has more than one grant overdue on reporting in both October and April of the same Rotary year*, the district and its member clubs will be suspended. As a result of this policy change, any future suspensions will be made during the April meeting only.

## **Staff Support of Activities**

During the 2007-08 Rotary year, the staff of the Humanitarian Grants Program Division presented training seminars, visited project sites, and served as resources for Rotarians around the globe.

Staff members visited grants in the following areas:

- Cairo and Alexandria, Egypt (Matching Grants)
- Chiang Mai, Thailand (Matching Grants)
- Dhaka, Bangladesh (Matching Grants)
- Hong Kong (Matching and District Simplified Grants)
- Kolkata, India (Matching Grants)
- Kuala Lumpur and various other cities, Malaysia (Matching Grants)
- Mexico City and various other cities, Mexico (Matching Grants)
- Taipei and various other cities, Taiwan (Matching Grants)

Staff members gave presentations or served as resources at the following Rotary events:

- Austin, TX, USA (Multidistrict Training)
- Bhubaneswar, India (Stewardship Training)
- Cairo and Alexandria, Egypt (Humanitarian Grants Training)
- Calgary, Canada (District Spending Seminar)
- Eugene, OR, USA (District Conference)
- Goa, India (Zone Institute)
- Greenville, SC, USA (District Foundation Seminar)
- Hong Kong (Humanitarian Grants Training)
- Kolkata, India (Humanitarian Grants Training)
- Kuala Lumpur and Kota Kinabalu, Malaysia (Humanitarian Grants Training)
- Lima, Peru (Stewardship Training)
- Los Angeles, CA, USA (International Convention)
- Myrtle Beach, SC, USA (Zone Institute)
- San Diego, CA, USA (International Assembly)
- Stuttgart, Germany (Stewardship Training)
- Taipei, Taiwan (Humanitarian Grants Training)

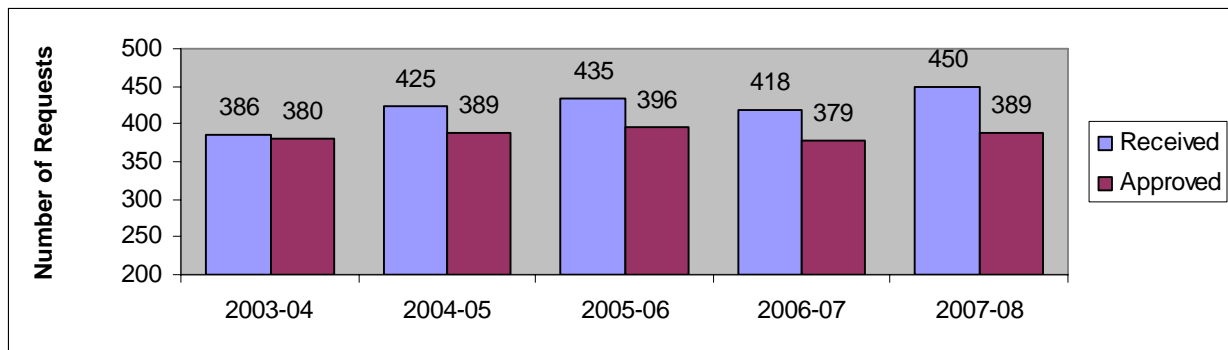
## District Simplified Grants

### Overview

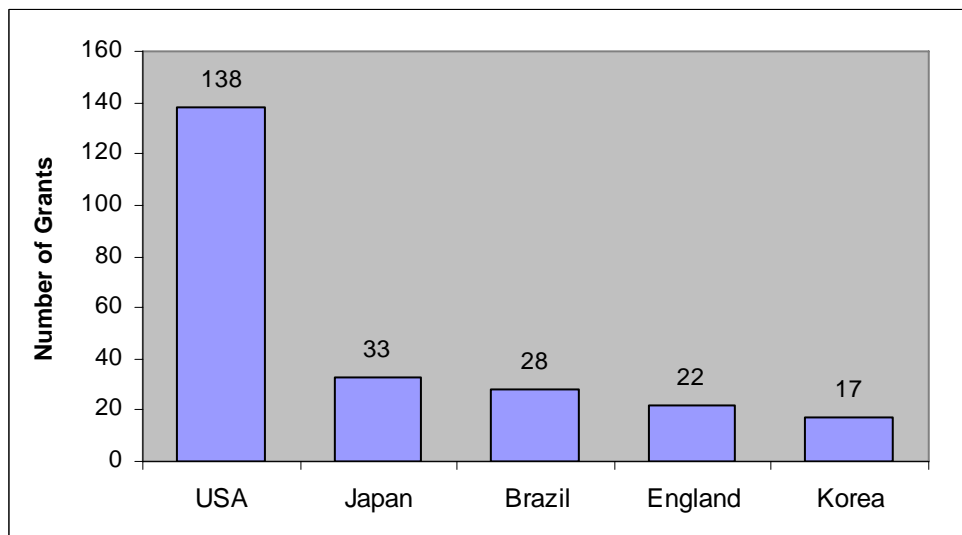
District Simplified Grants (DSG) are a tool for Rotary districts to support short-term, humanitarian projects that benefit the community. Districts can request up to 20% of their District Designated Fund (based on Annual Giving three years prior) for one grant per Rotary year to support multiple projects locally or internationally.

2007-08 Overview	
Number of grants awarded	389
Total grant awards	US\$6,811,589
Average grant award	US\$17,511
Number of countries receiving District Simplified Grants	42
Number of reports received	501
Number of grant files closed	364

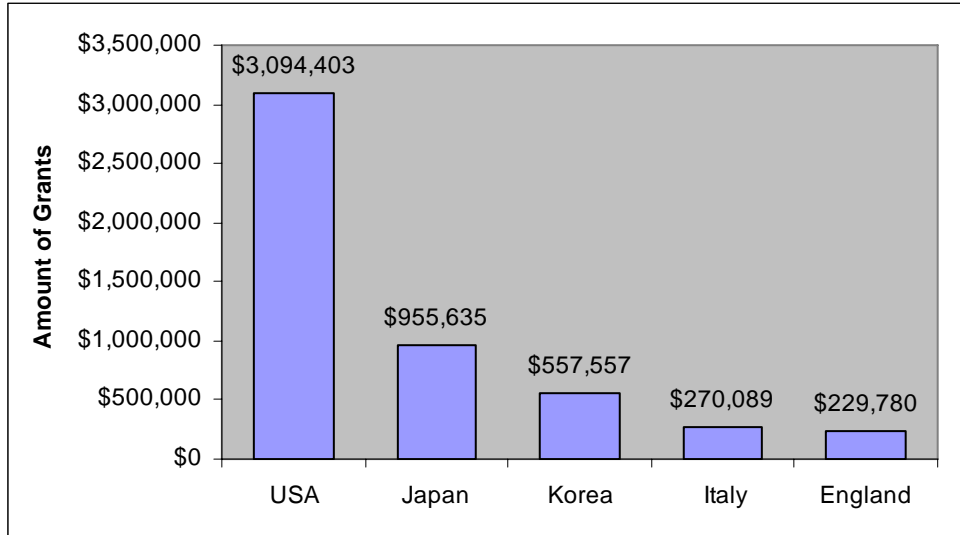
### Grant History



### Top Five Recipients (Number of Grants)



## Top Five Recipients (Amount of Grants)



## Project Highlights

Through a US\$38,000 District Simplified Grant, District 3480 (Taiwan) was able to support the service projects of four of its member clubs. These clubs received individual grants ranging from \$7,000 to \$13,000 which were used to carry out projects assisting local, needy populations. In partnership with NGOs, government groups and many volunteers, the Rotary Club of Taipei Fujung used their DSG funds to support an educational program for high-risk, low-income children. These children received a daily snack, tutoring, counseling, and mentoring. The Rotarian sponsors report that after one semester, the participating children have already benefited greatly from the project as demonstrated through increased self-confidence, improved academic achievement, and heightened sense of caring for others. As the children bring these achievements back to their respective families, the benefits of this project are sure to be felt throughout the entire community.



Photo courtesy of Josephine Wong

Children receive a snack during an educational program.

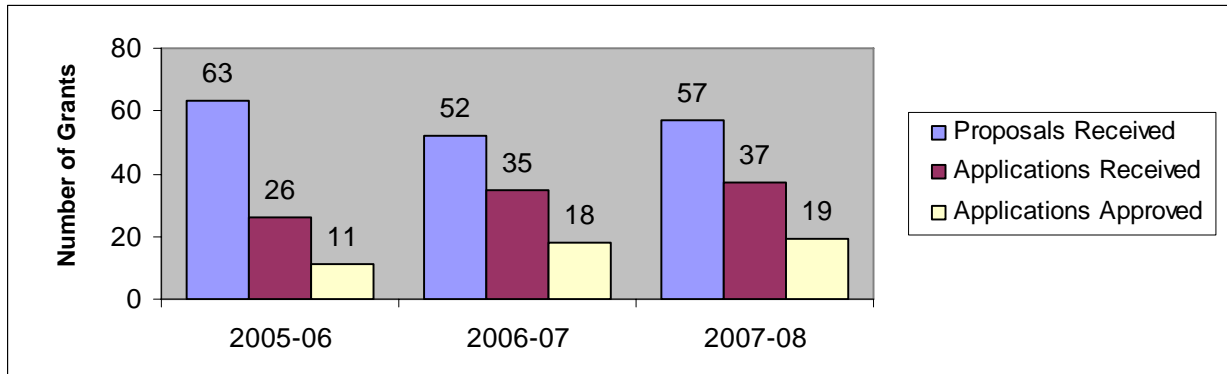
## Health, Hunger and Humanity (3-H) Grants

### Overview

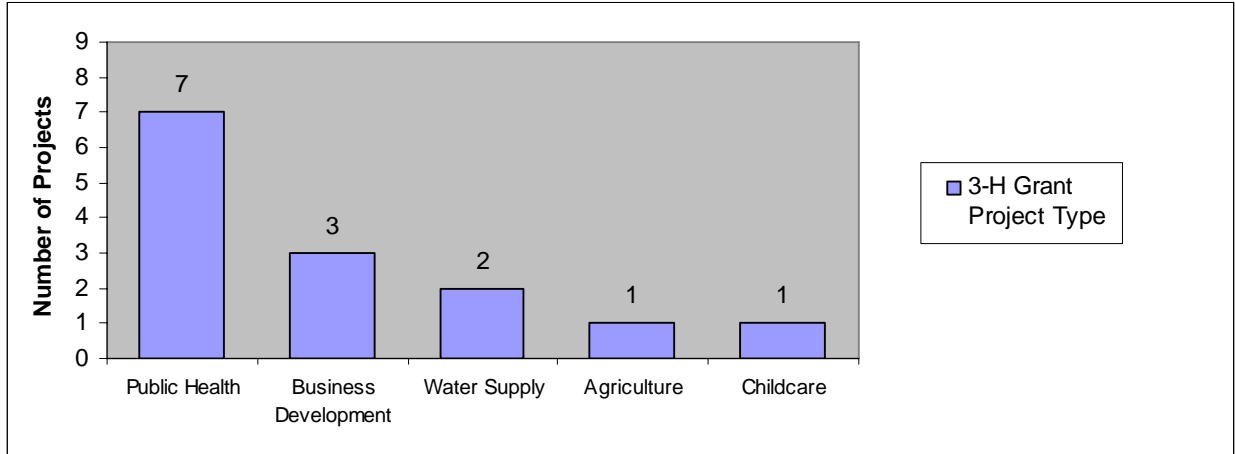
The purpose of Health, Hunger and Humanity (3-H) Grants is to improve health, alleviate hunger, and enhance human and social development as a means of advancing international understanding, goodwill, and peace. Through this program, the Foundation provides major grants for integrated, large-scale, sustainable, international development projects. The emphasis is on supporting Rotarians who are assisting those who are working to improve the quality of life for themselves and their communities. 3-H grants are awarded annually in April and range from US\$100,000 to \$300,000.

<b>2007-08 Overview</b>	
<b>Number of grants awarded</b>	<b>19</b>
<b>Total grant awards</b>	<b>US\$5,334,577</b>
<b>Average grant award</b>	<b>US\$280,767</b>
<b>Number of countries for which 3-H grants were approved</b>	<b>17</b>
<b>Number of reports received</b>	<b>37</b>
<b>Number of grant files closed</b>	<b>17</b>

### Grant History



## Top Five Project Types



## Project Highlights

The Rotary clubs of Istanbul-Topkapi, Turkey (D-2420), and Campbell, CA, USA (D-5170), received a \$144,500 3-H grant to provide equipment for a safe, clean water system. With support from village elders, this project is helping to coordinate connection of homes, schools, and mosques to the water system in a semiurban area near Istanbul. In the process of enlisting the support of local leaders, the Rotarian sponsors learned that community members had been arguing over water rights for 40 years. Through careful negotiation, Rotarians were able to secure water rights for the project and resolve the decades-old problem. Ongoing maintenance of the water facilities has been assumed by the village. Water fees established by the village elders will be collected and used to provide regular maintenance of the water works. In addition to providing clean water, the sponsoring clubs organized a health fair and screenings in conjunction with the ground breaking ceremony, underscoring the importance of community health. As a result of their dedication, Rotarians in Turkey and the USA have improved the quality of life for nearly 3,000 people, ensuring that they have regular access to clean water.

The village mayor enjoys clean water from a public fountain.



Photo courtesy of Murat Tipigil

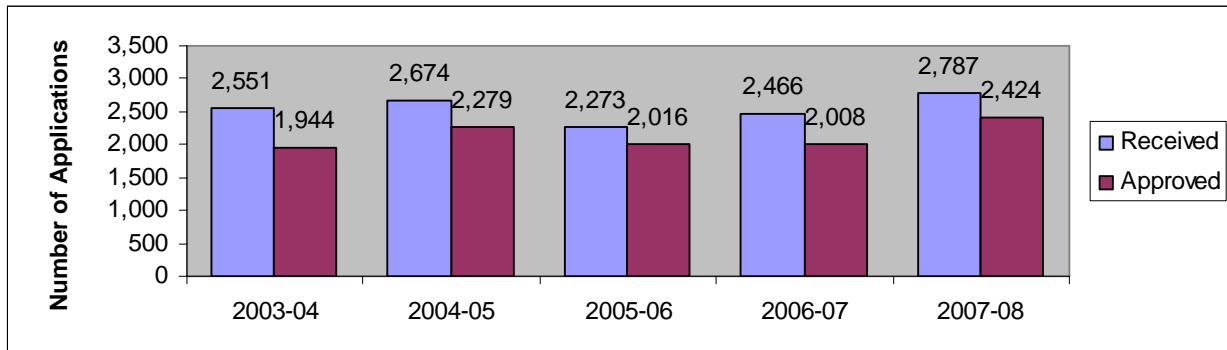
# Matching Grants

## Overview

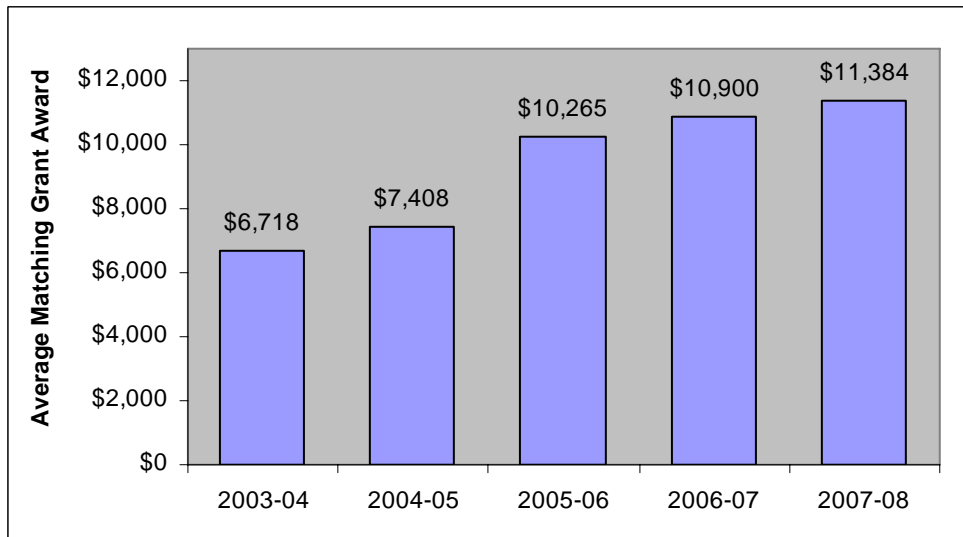
Through Matching Grants, The Rotary Foundation matches contributions raised by Rotary clubs and/or districts for international humanitarian service projects. Matching Grant projects are based upon international partnership; Rotary clubs and districts in at least two countries must work together to plan, implement, and complete the project. Awards for these grants range from US\$5,000 to \$150,000 and help fund a wide range of humanitarian projects.

2007-08 Overview	
Number of grants awarded	2,424
Total grant awards	US\$27,594,432
Average grant award	US\$11,384
Number of countries receiving Matching Grants	138
Number of reports received	2,730
Number of grant files closed	2,070

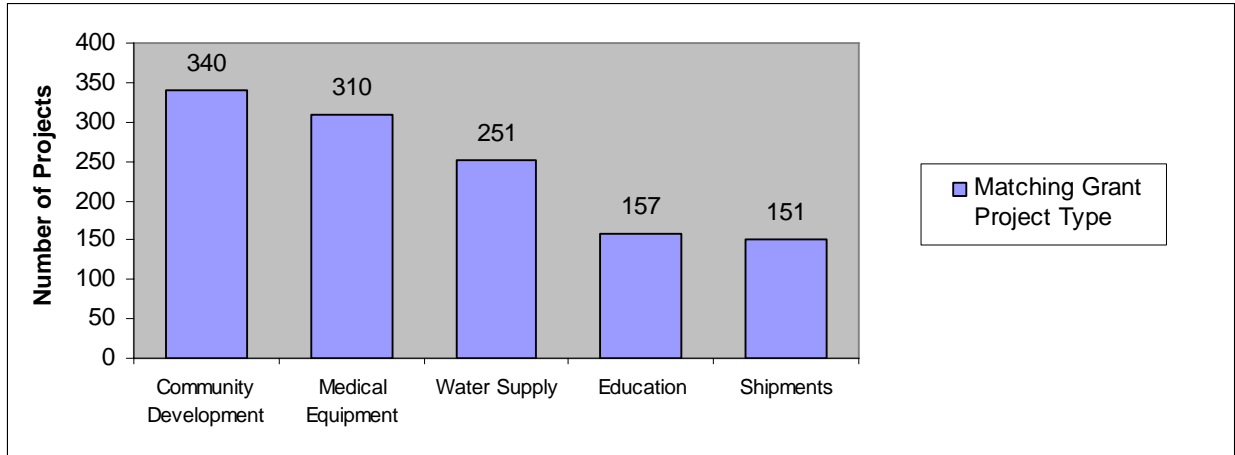
## Grant History



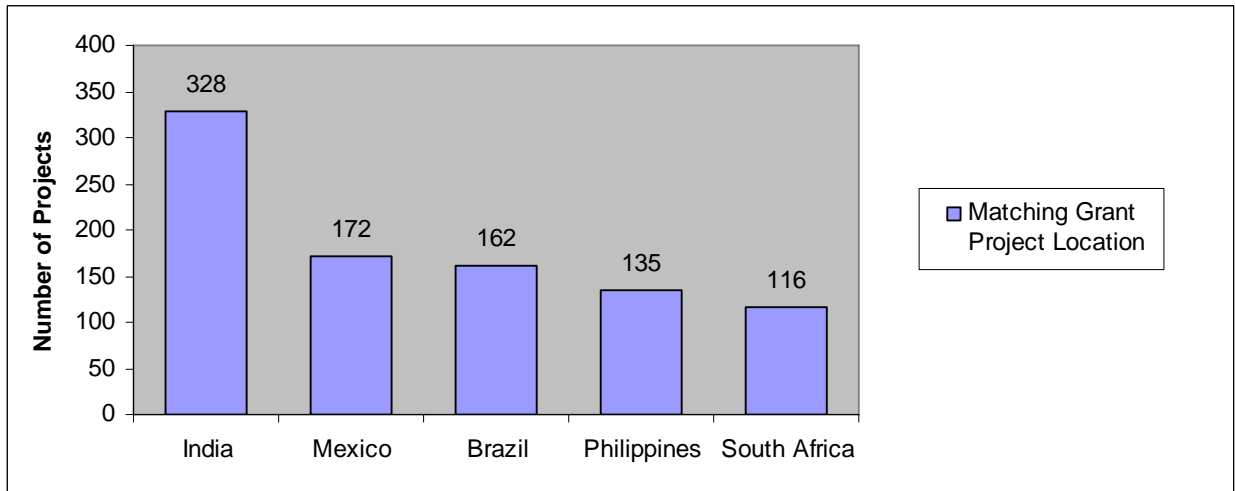
## Average Matching Grant Award



### Top Five Project Types



### Top Five Recipient Countries



### Project Highlights

The Rotary clubs of Arusha, Tanzania (D-9200), and The Island and Royal Manor of Portland, England (D-1200), partnered together to carry out a large-scale malaria control project in the Arusha area of Tanzania. Rotarians in England and Tanzania were able to raise nearly \$160,000 in contributions, which were matched by TRF with a \$79,885 Matching Grant. In all, this project distributed 110,160 mosquito nets to families of small children. Since most children in this region sleep two to a bed, it is estimated that over 200,000 children have benefited from this project. Furthermore, reported deaths from malaria in this region have dropped 50% from the start of the project. In addition to saving lives, this project has also helped to increase school attendance and reduce medical expenses. This ambitious project is a clear example of the tremendous impact that Rotarians can have on a community as a result of their determination to make the world a better place.



Children receive mosquito nets after answering malaria quiz questions.

Photo courtesy of Faye Cran



Villagers wait to receive mosquito nets for their children

Photo courtesy of Faye Cran

# Volunteer Service Grants

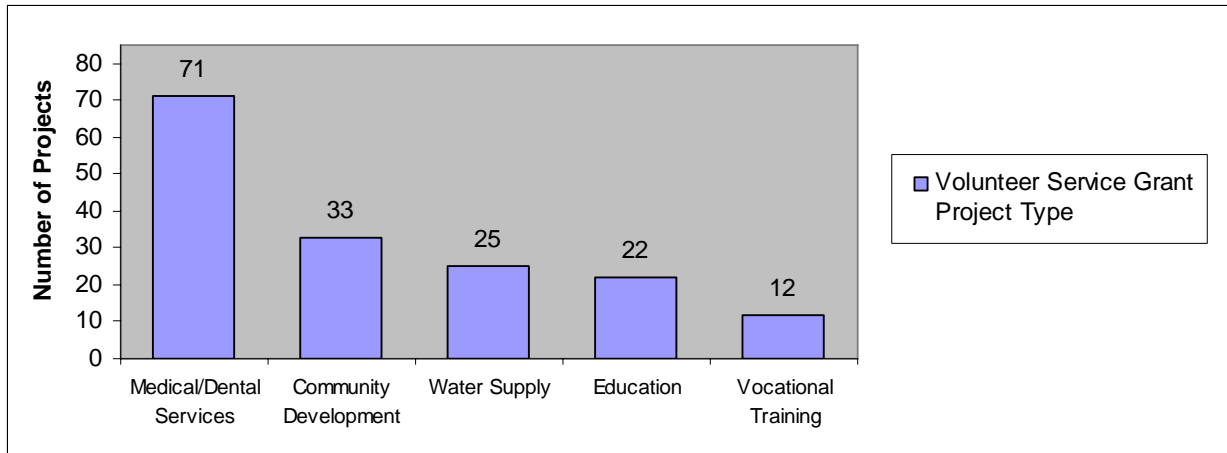
## Overview

Volunteer Service Grants support the international travel of qualified Rotarians and spouses of Rotarians to provide a needed service to a community and/or to plan the implementation of a needed project in a community. Eligibility for travelers is based on 1) a defined community need; 2) a need that can be met by the experience and skills of the Rotarians/team; and 3) an understanding that the skills and experience are not available in the community. The award is a flat grant with US\$3,000 available to an individual or \$6,000 available for a team of up to five members.

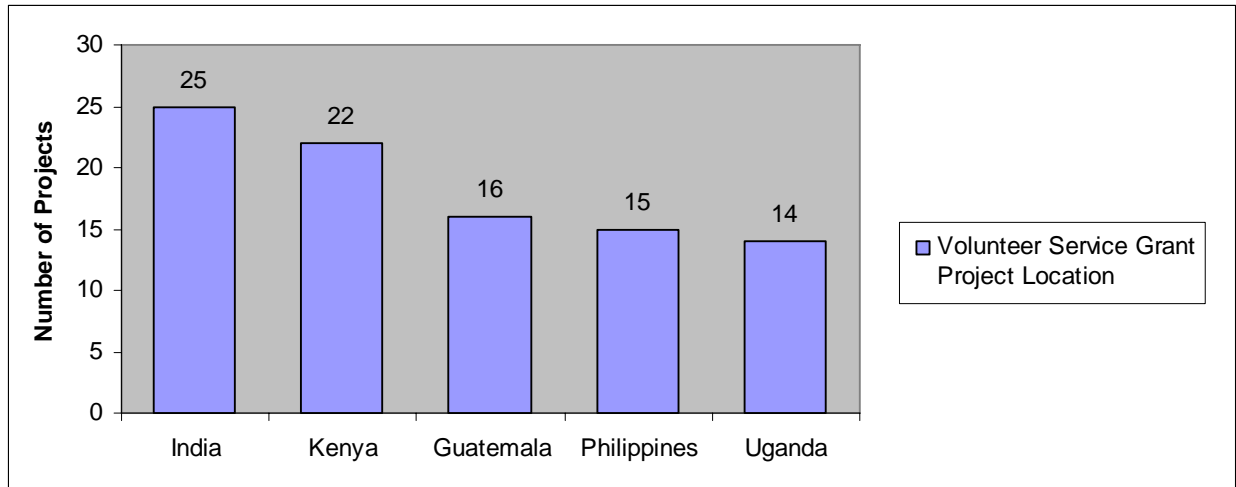
2007-08 Overview	
Number of grants awarded	227
Total grant awards	US\$1,170,000
Average grant award	US\$5,154
Number of countries receiving Volunteer Service Grants	58
Number of reports received	369*
Number of grant files closed	179

\*This figure includes Final Reports and Post-Service Evaluations.

## Top Five Types of Service



## Top Five Project Locations



## Project Highlights

The Rotary clubs of Bogota, Colombia (D-4290), and Vernon, Canada (D-5060), partnered together to apply for a Volunteer Service Grant to support a microcredit project in Colombia. Through this grant, Rotarian Berta Lopera, a business law expert and member of the Rotary Club of Vernon, traveled to Colombia to help get this project off the ground. The host Rotarians helped to identify loan recipients, many of whom have been displaced from their homes due to violence. Rotarian Lopera and the host Rotarians then worked with these individuals to teach them about the microcredit project and help them get started, including shopping for materials. Weekly contact was maintained with the recipients to monitor the development of their enterprises and to help ensure that they will be able to repay their loans. In all, 70 loans were granted to extremely needy individuals, helping them to start new lives and become self-sufficient.



Rotarian Berta Lopera helps a microcredit loan recipient purchase supplies to start her own business.

Photo courtesy of Vivian Merchant

## Grant Activity by Country

In 2007-08, Humanitarian Grants were awarded to Rotary clubs and districts in 140 countries as shown in the table below.

<b>Project Country</b>	<b>Total # Grants</b>	<b>Total Amount of Grants (US\$)*</b>
Afghanistan	4	\$87,590
Albania	1	\$10,000
Algeria	1	\$6,456
Antigua & Barbuda	1	\$8,000
Argentina	47	\$292,690
Australia	18	\$190,622
Austria	2	\$46,148
Azerbaijan	1	\$3,000
Bahamas	3	\$74,754
Bangladesh	17	\$187,867
Belarus	4	\$25,280
Belgium	7	\$105,164
Belize	6	\$326,375
Benin	9	\$344,633
Bolivia	24	\$269,659
Bosnia-Herzegovina	3	\$39,425
Botswana	1	\$9,814
Brazil	192	\$1,702,797
British Virgin Islands	1	\$8,667
Bulgaria	13	\$170,335
Burkina Faso	10	\$137,035
Burundi	1	\$10,175
Cambodia	12	\$418,851
Cameroun	20	\$528,276
Canada	9	\$134,992
Cape Verde	1	\$10,457
Central African Republic	3	\$76,347
Chile	12	\$67,302
Colombia	26	\$220,039

<b>Project Country</b>	<b>Total # Grants</b>	<b>Total Amount of Grants (US\$)*</b>
Congo, Democratic Rep. of	17	\$181,493
Costa Rica	16	\$182,858
Côte d'Ivoire	3	\$38,504
Croatia	3	\$77,233
Czech Republic	3	\$19,155
Denmark	4	\$16,396
Dominica	2	\$25,495
Dominican Republic	20	\$250,683
Ecuador	50	\$506,755
Egypt	10	\$95,303
El Salvador	16	\$203,304
England	24	\$262,580
Estonia	5	\$52,762
Ethiopia	16	\$234,003
Fiji	9	\$350,575
Finland	5	\$20,448
France	13	\$152,496
French West Indies	1	\$11,581
Gabon	2	\$57,141
Gambia, The	1	\$6,236
Germany	12	\$229,797
Ghana	36	\$442,434
Greece	4	\$28,842
Greenland	2	\$40,569
Grenada	2	\$172,268
Guatemala	61	\$1,006,747
Guinea	2	\$10,000
Guinea-Bissau	7	\$92,517
Guyana	6	\$36,089
Haiti	11	\$209,226
Honduras	50	\$1,207,779
Hong Kong	3	\$42,150
Hungary	2	\$19,130

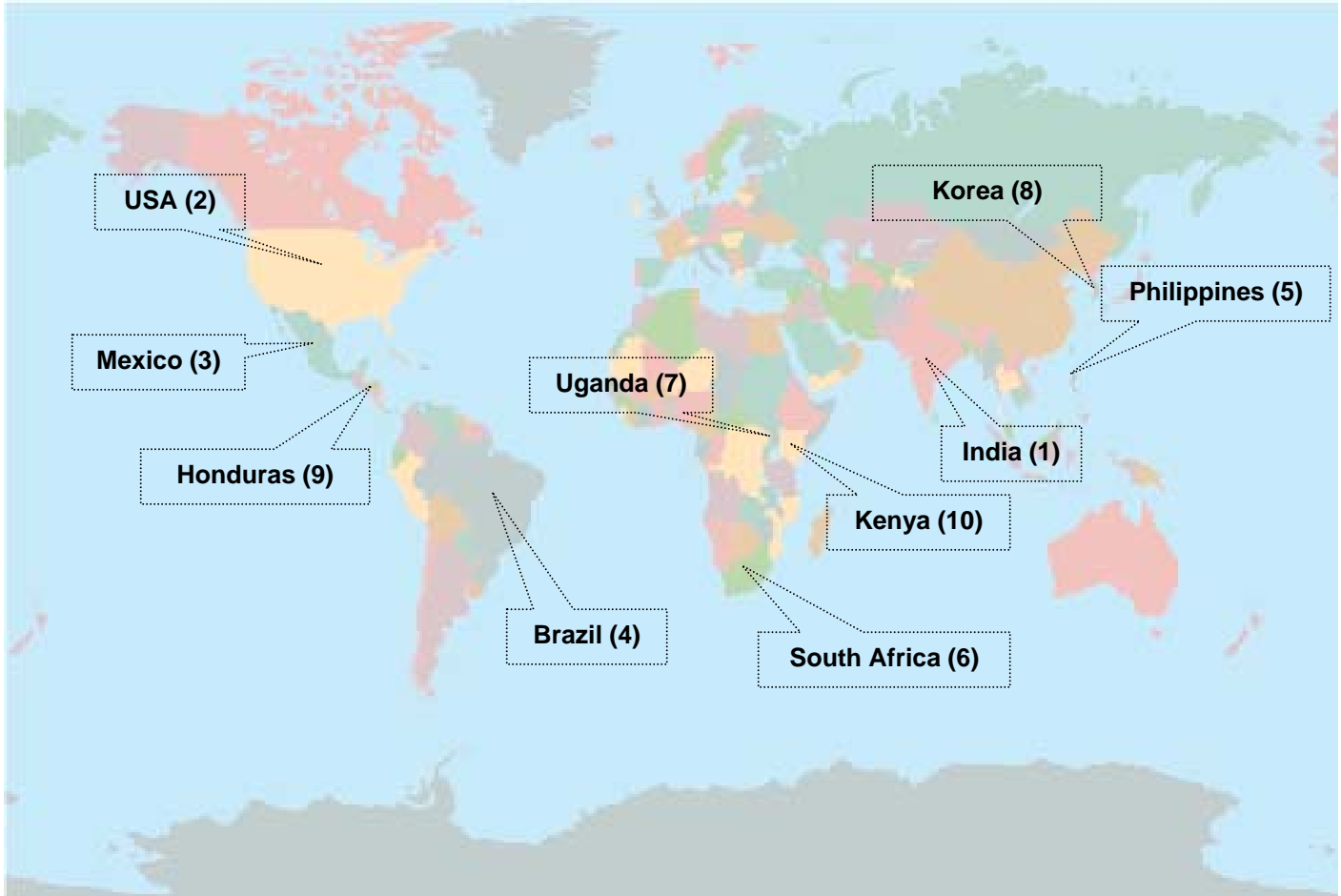
<b>Project Country</b>	<b>Total # Grants</b>	<b>Total Amount of Grants (US\$)*</b>
India	368	\$3,960,226
Indonesia	56	\$486,778
Ireland	1	\$14,310
Israel	9	\$105,095
Italy	18	\$414,921
Jamaica	8	\$63,412
Japan	36	\$976,578
Jordan	2	\$31,000
Kenya	72	\$1,135,943
Korea	83	\$1,280,208
Kosovo (admin. by UNMIK)	3	\$27,010
Kyrgyzstan	1	\$7,075
Latvia	6	\$80,952
Lebanon	28	\$319,410
Lesotho	1	\$25,000
Liberia	2	\$114,757
Lithuania	7	\$389,195
Madagascar	13	\$138,783
Malawi	10	\$132,827
Malaysia	16	\$151,218
Mali	9	\$64,829
Mauritania	1	\$12,297
Mauritius	1	\$7,000
Mexico	187	\$1,995,534
Micronesia	3	\$21,230
Moldova, Rep. of	1	\$10,028
Mongolia	17	\$353,402
Montserrat	1	\$6,332
Morocco	9	\$92,709
Mozambique	7	\$138,142
Namibia	14	\$183,750
Nepal	46	\$710,844
Netherlands	8	\$73,159

<b>Project Country</b>	<b>Total # Grants</b>	<b>Total Amount of Grants (US\$)*</b>
New Zealand	5	\$44,778
Nicaragua	5	\$50,837
Niger	6	\$78,162
Nigeria	37	\$667,325
Norway	6	\$21,638
Pakistan	25	\$231,394
Panama	13	\$114,215
Papua New Guinea	10	\$75,044
Paraguay	6	\$38,748
People's Republic of China	18	\$573,377
Peru	28	\$296,121
Philippines	154	\$1,404,859
Poland	18	\$175,315
Portugal	2	\$19,082
Puerto Rico	3	\$31,600
Romania	25	\$279,491
Russia, Eastern	11	\$133,519
Russia, Western	10	\$109,045
Rwanda	12	\$140,142
Samoa	3	\$22,686
Scotland	2	\$27,249
Senegal	3	\$34,612
Serbia, Rep. of	2	\$11,926
Sierra Leone	6	\$80,163
Slovakia	1	\$5,604
Solomon Islands	3	\$39,626
South Africa	126	\$1,384,368
Spain	2	\$15,172
Sri Lanka	19	\$278,076
St. Lucia	1	\$10,065
St. Vincent & the Grenadines	1	\$3,000
Suriname	1	\$24,900
Swaziland	4	\$47,863

<b>Project Country</b>	<b>Total # Grants</b>	<b>Total Amount of Grants (US\$)*</b>
Sweden	8	\$39,685
Switzerland	4	\$47,465
Taiwan	37	\$546,872
Tanzania	32	\$810,487
Thailand	92	\$907,963
Timor-Leste, Dem. Rep. of	6	\$61,272
Togo	7	\$129,428
Tonga	4	\$23,476
Trinidad & Tobago	1	\$25,000
Tunisia	12	\$139,261
Turkey	44	\$340,208
Uganda	85	\$1,369,886
Ukraine	8	\$110,358
Uruguay	3	\$10,624
U.S. Virgin Islands	5	\$59,353
USA	178	\$3,681,064
Vanuatu	3	\$16,100
Venezuela	8	\$82,342
Wales	2	\$18,719
Zambia	29	\$404,918
Zimbabwe	12	\$124,587
<b>TOTAL</b>	<b>3,059</b>	<b>\$40,738,323</b>

\*The Total Award for Matching Grant projects does not include DDF contributions. However, for District Simplified Grants, the Total Award is solely DDF.

## Top Ten Countries Participating in Humanitarian Grants\*



\*Ranking based on total US\$ amount of grants awarded to support projects in a given country.

Rank	Country	# Grants Awarded	Total Grant Awards (US\$)
1.	India	368	\$3,960,226
2.	USA	178	\$3,681,064
3.	Mexico	187	\$1,995,534
4.	Brazil	192	\$1,702,797
5.	Philippines	154	\$1,404,859
6.	South Africa	126	\$1,384,368
7.	Uganda	85	\$1,369,886
8.	Korea	83	\$1,280,208
9.	Honduras	50	\$1,207,779
10.	Kenya	72	\$1,135,943

Note: A significant portion of grant activity in the USA and Korea are from District Simplified Grants.