



FREQUENTLY ASKED QUESTIONS (FAQ)

Named Endowed Fund for Global Grants

With a gift of \$150,000 or more, a donor may establish a fund that will provide support for global grants in any of the six areas of focus. Depending on the amount of the gift, the donor may specify the district that will use the earnings, the activity type, area of focus, and/or geographic location. The spendable earnings from global grant endowments that do not specify a district will be applied to eligible grants by the Foundation as replacement of the World Fund match. For more information, please reference the [Endowment Naming Opportunities](#).

1. What is an endowed fund for a global grant, and how is it used?

It is a giving and naming opportunity to support global grants. When the donor specifies the district that will sponsor the grant, the earnings from the endowed fund will be available to that district as a funding source for a global grant that meets the restrictions and/or preferences placed on the fund by the donor (e.g., areas of focus).

2. Where can a district find the spendable earnings balance for a global grant endowed fund?

The Term/Endowed, Global Grant, Gift Availability Report available to district leaders in MyRotary provides the spendable earnings balance as well as any restrictions and preferences on the use of the earnings. For further assistance, contact giftadministration@rotary.org.

3. When are spendable earnings from global grant endowed funds available to districts?

Spendable earnings will be available by the end of August each year. For further assistance, contact giftadministration@rotary.org.

4. Are endowed fund spendable earnings impacted by the 5% assessed on cash contributions to global grants?

No, the 5% does not apply.

5. How can districts apply for global grants?

Applications must be completed online at Rotary.org. Contact your [Regional Grants Officer](#) if you need assistance with the application.

6. Who can sponsor a global grant funded with an endowed fund?

The district specified by the donor in the gift agreement.

7. Is an international sponsor required for a global grant with an endowed fund?

Yes. All global grants require a host and international sponsor.

8. Do global grants funded with endowed funds need to adhere to all global grant requirements?

Yes. All global grants must meet all requirements as stated in the [Terms and Conditions for The Rotary Foundation District and Global Grants](#) and the [Areas of Focus Policy Statements](#). However, the 30% minimum contribution from the international partner(s) and the \$15,000 minimum World Fund request are not required. Please contact your [Regional Grants Officer](#) if you have questions about global grant requirements.

9. Can a district fund a global grant entirely with an endowed fund?

Yes. However, districts have the option to add cash and/or DDF to the funding of the grant. Cash and DDF will be matched by the World Fund. See the “Endowed Global Grant Funding Scenarios” document for more information.

10. Do endowed fund spendable earnings receive a World Fund match?

No, endowed fund spendable earnings do not receive a World Fund match. See the “Endowed Global Grant Funding Scenarios” document for more information.

11. How does a district indicate that funding from an endowed fund is to be used for a global grant?

In the funding section of the online grant application, the endowed funds available will appear as funding options available to that district. When completing the funding portion of the grant application, select the district and then the endowed fund number (e.g., E12345) as the funding source.

12. Can a global grant funded with an endowed fund support the beneficiary or cooperating organization affiliated with the donor?

No. There may not be a conflict of interest between the donor of the gift and the beneficiary or cooperating organization involved in the global grant. Please reference the conflict of interest policy for program participants in the [Terms and Conditions for The Rotary Foundation District and Global Grants](#).

13. Can a district use more than one endowed fund to fund a global grant?

No. A global grant can only use funding from one endowed fund per global grant.

14. Can a district use an endowed fund to fund more than one global grant?

Yes, as long as the global grant funding meets the US\$30,000 minimum requirement. However, all global grants will carry the name of the donor and comply with any restrictions and/or preferences placed on the endowed fund by the donor. Please contact giftadministration@rotary.org with any questions.

15. Is there a minimum amount of spendable earnings required to be used towards the funding of a global grant?

No. Any amount of spendable earnings may be included in the funding of a global grant.

16. What happens if a district does not use all of the spendable earnings available for a given Rotary year from an endowed fund?

If spendable earnings are not used within the Rotary year in which they become available, they will carry over to the following year. Any new spendable earnings will be added to that fund's spendable earnings account balance annually.

17. Do global grants funded with endowed funds require an additional review if the funding of the grant exceeds a certain amount?

Yes. If a global grant with total funding greater than \$100,000 includes an endowed fund, a technical review and interim site visit will be required.

If a global grant with total funding greater than \$200,000 includes an endowed fund, an advance site visit, an interim site visit, and review by the full board of the Trustees will be required. Global grant applications at this level need to be submitted by the following deadlines for review by the Trustees: 1 June will be reviewed in October; 1 October will be reviewed in January; 1 December will be reviewed in April; and 1 March will be reviewed in June.

18. What other information about global grants is available?

Many resources are available; click below to access the online resource:

[A Guide to Global Grants](#)

[Terms and Conditions for Rotary Foundation District Grants and Global Grants](#)

[Areas of Focus Policy Statements](#)

[Rotary Grants Staff Contact Sheet](#)



FREQUENTLY ASKED QUESTIONS (FAQ)

Directed Gifts (formerly “Term Gifts”)—District Specified

A directed gift of US\$30,000 or more may support one or more global grants sponsored by a district chosen by the donor. The donor may also specify the area of focus and activity type: humanitarian project, scholarship, or vocational training team.

1. What is a directed gift for a global grant, and how is it used?

It is a giving and naming opportunity to support global grants. When the donor specifies the district that will sponsor the grant, the directed gift will be available to that district as a funding source for a global grant that meets the restrictions and/or preferences placed on the gift by the donor (e.g., areas of focus).

2. What restrictions and/or preferences may a donor specify?

The donor may restrict the use of the gift to one or more areas of focus and/or may give a general geographic preference for the global grant project site.

3. Does the global grant carry the name of the donor?

Yes, the global grant will carry the name of the donor, even if the entire grant is not funded by the directed gift.

4. Will a portion of directed gifts be used to support administrative expenses?

Yes, 5% of the gift will be used to offset the costs of administration. Like cash contributions to global grants, directed gifts do not go through the 3-year investment cycle.

5. What type of recognition is given to donors who fund a directed gift?

Donors receive major donor recognition, but do not receive Foundation recognition points.

6. Can more than one person or entity give to a directed gift?

No. Directed gifts are reserved for individuals, couples, non-Rotary affiliated foundations and corporations.

7. Can a district use DDF to fund a directed gift?

No. However, DDF may be used in addition to the directed gift as part of the global grant funding. (See “Global Grant Directed Gift Funding Scenarios”)

8. Do directed gifts receive investment income?

No. Directed gifts are to be used in the short term and in their entirety; they are not impacted by investment gain or loss.

9. Can clubs and districts establish a directed gift?

No. However, the donor may name the directed gift in honor of a district or club.

10. Where can districts find the directed gifts available to them?

The Directed/Endowed, Global Grant, Gift Availability Report available to district leaders in My Rotary provides the directed gift amount available as well as any restrictions and preferences on the use of the funds. For further assistance, contact giftadministration@rotary.org.

11. When is the directed gift available for use by the district?

The intention is for the gift to be used in the Rotary year immediately following the year in which the gift was received. However, the gift will be available once received and processed by the Foundation, typically within 10 business days.

12. How can districts apply for global grants?

Applications must be completed online at Rotary.org. Contact your [Regional Grants Officer](#) if you need assistance with the application.

13. Who can sponsor a global grant funded with a directed gift?

The district specified by the donor in the gift agreement. The donor may also express a preference that a club within the district sponsor the grant.

14. Is an international sponsor required for a global grant funded by a directed gift?

Yes. All global grants require a host and international sponsor.

15. Do global grants funded with directed gifts need to adhere to all global grant requirements?

Yes. All global grants must meet all requirements as stated in the [Terms and Conditions for The Rotary Foundation District and Global Grants](#) and the [Areas of Focus Policy Statements](#). However, the 30% minimum contribution from the international partner(s) and the \$15,000 minimum World Fund request are not required. Please contact your [Regional Grants Officer](#) if you have questions about global grant requirements.

16. Can a district fund a global grant entirely with a directed gift?

Yes. However, districts have the option to add cash and/or DDF to the funding of the grant. Cash and DDF will be matched by the World Fund. See the “Directed Gift Global Grant Funding Scenarios” document for more information.

17. Does a directed gift receive a World Fund match?

No. Directed gifts do not receive a World Fund match. See the “Directed Gifts for Global Grant Funding Scenarios” document for more information.

18. How does a district indicate that funding from a directed gift is to be used for a global grant?

In the funding section of the online grant application, the directed gifts available will appear as funding options available to that district. When completing the funding portion of the grant application, select the district and then the directed gift number (e.g., T12345) as the funding source.

19. Can a global grant funded with a directed gift support the beneficiary or cooperating organization affiliated with the donor?

No. There may not be a conflict of interest between the donor of the gift and the beneficiary or cooperating organization involved in the global grant. Please reference the conflict of interest policy for program participants in the [Terms and Conditions for The Rotary Foundation District and Global Grants](#).

20. Can a district use more than one directed gift to fund a global grant?

No. A global grant can only use funding from one directed gift per global grant.

21. Can a district use a directed gift to fund more than one global grant?

Yes, as long as the directed gift contribution to each global grant is at least US\$15,000. All global grants will carry the name of the donor and must comply with any restrictions and/or preferences placed on the directed gift by the donor. Please contact giftadministration@rotary.org with any questions.

22. Do global grants funded with directed gifts require any additional review if the funding of the grant exceeds a certain amount?

Yes. If a global grant with total funding greater than \$100,000 includes a directed gift, a technical review and interim site visit will be required.

If a global grant with total funding greater than \$200,000 includes a directed gift, an advance site visit, an interim site visit, and review by the full board of the Trustees will be required. Global grant applications at this level need to be submitted by the following deadlines for review by the Trustees: 1 June will be reviewed in October; 1 October will be reviewed in January; 1 December will be reviewed in April; and 1 March will be reviewed in June.

23. What other information about global grants is available?

Many resources are available; click below to access the online resource:

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[Rotary Grants Staff Contact Sheet](#)

24. What happens if a district does not use the directed gift?

If the directed gift is not used, it will carry over to the following year. If it remains unused, the Foundation may determine how best to use the remaining funds.

FREQUENTLY ASKED QUESTIONS (FAQ)

Directed Gifts (formerly “Term Gifts”)—No District Specified

A directed gift of US\$15,000 or more may support global grants in a particular area of focus without naming a district. In that case, the Foundation will apply the gift to a global grant that meets the donor’s preferences as replacement of all or part of the World Fund match.

1. What is a directed gift without a district specified?

A one-time gift of US\$15,000 or more that is to be fully expended, usually in the following Rotary year, on one or more approved global grants.

2. How is this type of directed gift used?

The gift will be used for a global grant that meets the restrictions and/or preferences placed on the gift by the donor (e.g., a specific area of focus). The directed gift is used in lieu of the first portion of any World Fund.

3. What restrictions and/or preferences may a donor specify?

The donor may restrict the use of the gift to one or more areas of focus and/or may give a general geographic preference for the global grant project site.

4. How is the specific global grant selected?

Based on the terms of the gift agreement, the specific global grant will be selected by The Rotary Foundation.

5. Does the global grant carry the name of the donor?

Yes, the global grant will carry the name of the donor, even if the entire grant is not funded by the directed gift.

6. Will a portion of directed gifts be used to support administrative expenses?

Yes, 5% of the gift will be used to offset the costs of administration. Like cash contributions to global grants, directed gifts do not go through the 3-year investment cycle.

7. What type of recognition is given to donors who fund a directed gift?

Donors receive major donor recognition, but do not receive Foundation recognition points.

8. Can numerous people give to a directed gift?

No. Directed gifts are reserved for individuals, couples, non-Rotary affiliated foundations and corporations.

9. Does a directed gift receive a World Fund match?

No, the directed gift does not receive a match from the World Fund; however, the gift may be leveraged by other funds, including District Designated Funds (DDF), and cash contributions that will be matched by the Foundation. See the “Global Grant Directed Gift Funding Scenarios” document for more information.