

Tittel:

## 90% av The Rotary Foundations midler går til gode formål

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Ingress:

**Dette er langt over kravet på 75% som Better Business Bureau og andre uavhengige rating byråer setter som nedre grense for å gi en "charity" graderingen "high efficiency" og en anbefaling om å bidra. I tillegg er TRF over flere år blant de 10 beste "charities" som Charity Navigator har vurdert.**

Brødtekst:

Naturlig nok stiller Rotarianere og andre spørsmål om hvor mye som blir igjen i The Rotary Foundation når kostnader administrasjon og fundraising-aktiviteter er betalt. Spørsmål om dette kommer også med jevne mellomrom opp i TRF-seminarene som nå gjennomføres i alle distriktets regioner.

Følgelig ble nylig 3 spørsmål om dette sendt til Rotary Internationals finansstab via RI-direktør Barry Matheson. Samme dag som spørsmålene ble sendt, hadde "The Rotarian" en klargjørende artikkel om samme tema – og dagen etter forelå grundige svar fra Rotary International i Evanston, USA.

Her er konkrete tall og sitat fra artikkelen om The Rotary Foundation i oktoberutgaven av "The Rotarian":

- For å innfri Better Business Bureaus krav til god forvaltning (accountability) bør 65% av fondets disponible midler gå til "programs" og ikke mer enn 35 % til administrasjon og fundraising.

Ferske tall fra TRFs regnskap for 2010-2011 viser 2,97% til administrasjon og 9,12% til fundraising, dvs totalt 12,09%. Dette er noe høyere enn tallene fra 2009-2010, da disse utgiftene var på hhv 2.3% og 7.3%, dvs totalt 9,6% . Regnskapstall for 2008-2009 viser en total på 10,7% og for 2007-2008 er tallet 7%

- *" The Foundation has earned grade A+ from The American Institute of Philanthropy, a top rating of four stars from Charity Navigator , and a full accreditation from the Wise Giving Alliance of the Better Business Bureau.*
- *The Foundation focuses more than 90% of its spending on programs, far exceeding the threshold of 75 % that independent charity-rating services view as a measure of high efficiency.*
- *The grant application and review process contains the safeguards necessary to ensure that the funds are used wisely.*

Så til svarene fra RLS Financial Controller and Chief Accounting Officer, Geoff Woie, og hans kollega, Tom Durand:

### 1. What kind of expenses are included in the figures of General Administration and Fund Development Costs in particular?

**Svar fra RI:**

*- General Administration expenses include the cost of personnel, services, communications, computer support, supplies, legal counsel, audit fees, and staff support to the Trustees.*

*- Fund Development expenses include the cost of personnel, services, communications, publications, public relations, supplies, computer support, legal counsel, and recognition items involved in acknowledging the generosity of donors to the Foundation.*

### 2. How does the percentage of TRF awards allocated to General Administration, Fund Development and

## **Operations compare when measured against similar costs in other relevant humanitarian and private investment funds?**

### **Svar fra RI:**

*- Independent rating services, such as Charity Navigator and the Better Business Bureau's "Wise Giving Alliance" base their ratings, in part, on financial analysis of the organization. The financial analysis is then compared to similar organizations in order to assign a rating.*

*Per Charity Navigator's website "We base our evaluations on the financial information each charity provides in its informational tax returns, or IRS Forms 990. We use that information to analyze a charity's financial performance in seven key areas, described below, that assess its financial efficiency and financial capacity. After analyzing those performance metrics, we compare the charity's performance with the performances of similar charities."*

*Also note that Charity Navigator has recognized The Rotary Foundation in their list of "10 of the Best Charities Everyone's Heard Of". Please refer to the link below:*

<http://www.charitynavigator.org/index.cfm?bay=top10ten.detail&listid=18>

*The conclusion can be drawn that, when compared to similar organization's, The Rotary Foundation has a four star rating.*

### **3. Would it be possible to underpin the evaluation of TRF made by Charity Navigator by financial analysis made by other well reputed financial analysts or evaluation agencies?**

#### **Svar fra RI:**

*- The Better Business Bureau's "Wise Giving Alliance" is another independent rating agency that produces in-depth evaluative reports on USA national charities based on comprehensive "Standards for Charity Accountability"*

<http://charityreports.bbb.org/public/All.aspx?bureauID=9999>

[http://www.bbb.org/us/Standards-Charity/.](http://www.bbb.org/us/Standards-Charity/)"

*- There are twenty standards for Charity Accountability which includes standards for Governance and Oversight, Measuring Effectiveness, Finances, and Fund Raising and Informational Materials. The Rotary Foundation meets all 20 of the Wise Giving Alliance's standards.*

*The link below will provide you with the Wise Giving Alliance's report on The Rotary Foundation:*

<http://www.bbb.org/charity-reviews/national/education-and-literacy/rotary-foundation-of-rotary-international-in-evanston-il-3656>

*- What is important to remember is that these are independent rating agencies that, for the most part, perform their evaluations based on public information (mainly The Rotary Foundation's Form 990- Return of Organization Exempt from Tax filed with the USA Internal Revenue Service). The Rotary Foundation does not financially support any of these rating agencies. Therefore, these rating are unbiased and based on facts. The reader of the charity rating services' reports will be able to readily conclude that The Rotary Foundation is financially responsible, well governed, transparent, and most important – The Rotary Foundation serves its mission.*