



THE ROTARY FOUNDATION

Zone 27 Communication

Foundation News for Rotary Districts and Rotary Clubs
November 2008

Zone 27

2008-2009 THE ROTARY FOUNDATION UPDATE

District	07-08 Total	08-09 Goal	08-09 Total	% of Goal	/Capita	Restricted	Perm F
D5580		\$ 326,454	\$ 66,544	20.38%	\$ 20.48	\$ 9,970	0
D5650	\$ 217,866	\$ 197,975	\$ 47,551	24.02%	\$ 19.98	\$ 8,220	0
D5950	\$ 913,784	\$ 724,825	\$ 70,434	9.72%	\$ 23.90	\$ 38,248	0
D5960	\$ 343,422	\$ 318,324	\$ 45,143	14.18%	\$ 13.63	\$ 19,708	0
D5970	\$ 242,407	\$ 226,639	\$ 42,241	18.64%	\$ 14.24	\$ 15,436	0
D6000	\$ 452,457	\$ 427,077	\$ 79,230	18.55%	\$ 18.71	\$ 10,691	\$ 89,337
D6220	\$ 176,197	\$ 112,915	\$ 26,078	23.10%	\$ 13.23	\$ 5,632	0
D6250	\$ 234,361	\$ 273,350	\$ 30,325	11.09%	\$ 9.07	\$ 21,422	\$ 50,000
D6270	\$ 230,941	\$ 293,160	\$ 58,752	20.04%	\$ 17.69	\$ 17,370	0
D6420	\$ 170,262	\$ 6,140	\$ 25,273	411.61%	\$ 11.38	\$ 7,939	0
D6440	\$ 424,200	\$ 355,130	\$ 51,256	14.43%	\$ 19.28	\$ 68,546	\$ 985
D6450	\$ 241,005	\$ 246,705	\$ 34,379	14.26%	\$ 14.90	\$ 27,196	0
TOTALS	\$3,731,963	\$3,174,041	\$ 382,052	12.21%	\$16.00	\$ 157,294	\$ 105,502

The Permanent Fund contributions only include realized gifts.

Notes:

- a. District 5580 will be joining Zone 27 (to become Zone 28 on July 1, 2009). This contribution report will include District 5580 as a line item, but they will not be included in the totals shown. I thought it might be of value to all of you to see the District 5580 reports as we approach our new Zone.
- b. The "Restricted Giving" column includes contributions to Rotary's \$100 Million Challenge as well as contributions to Matching Grants. Please check your **District's PolioPlus Report** to review specific Club contributions to the Polio Eradication effort.

All information included in this report reflects contributions through October 31, 2008

Evaluation of the 4 Months Ended Contribution Report

As District Governor, District Rotary Foundation Chair and Sub-Committee Chairs, you have tremendous responsibilities within your District. As you review the above report I would ask you to make the following evaluations:

- a. Are your Club's contributions on target to achieve their goals?
- b. Are your District's contributions at the 25% mark?
- c. Have you held your District Rotary Foundation Seminar yet? Do you have an event scheduled?
- d. What kind of "training" are you providing to your District Clubs to assist them with achieving their TRF Goals?
- e. Do all of your Clubs have Rotary Foundation Chairs and Committees that resemble your District TRF Committee structure?
- f. Are Club Treasurer's holding funds received through member's dues because they don't know what to do with them?
- g. Contact your fellow District Governors whose clubs are achieving their goals-what are they doing?

Assistance for Club Treasurer's and Club Foundation Chairs

Many Clubs are offering their members the opportunity to contribute to The Rotary Foundation Every Rotarian Every Year (EREY) effort via their quarterly or semi-annual dues. We ask our Club Treasurer's to collect the EREY contribution but we don't always give them the training by which they can then forward the member's contributions on to The Rotary Foundation. Eventually members become frustrated because they don't see their support for TRF being recorded at TRF. Club Presidents don't understand why their Club is not meeting their EREY goals when they know their members are indeed supporting the EREY effort. Following is a set of procedures that can easily be forwarded to all your Club's Treasurers. This will ensure that all contributions made to OUR Rotary Foundation are indeed getting to The Foundation.

1. Ask each Club to appoint a Club Rotary Foundation Chair and/or Club Rotary Foundation Annual Giving Chair.
2. The Club Foundation Chair/Club Rotary Foundation Chair can work with the Club Treasurer to invoice, collect and forward their member's contributions to TRF.
 - A. Secure commitments from every member of your Club through a pledge card. (Members who elect to have their commitment added to their dues statement are listed on a separate spreadsheet [see below]).
 - B. Each quarter or semi-annually (depending on each Club's dues structure), the spreadsheet is updated according to new members, increased contributions, etc.
 - C. Send one check, with the spreadsheet, on a quarterly or semi-annual basis, to The Rotary Foundation at:

**The Rotary Foundation
14280 Collections Center Drive
Chicago, IL 60693**

SAMPLE SPREADSHEET

Club Name and Club Number District Number		
Member Name (Same as on CRS)	Member ID # (from CRS)	\$ gift amount
Member Name (Same as on CRS)	Member ID # (from CRS)	\$ gift amount
Member Name (Same as on CRS)	Member ID # (from CRS)	\$ gift amount
Member Name (Same as on CRS)	Member ID # (from CRS)	\$ gift amount
Member Name (Same as on CRS)	Member ID # (from CRS)	\$ gift amount
TOTAL		TOTAL of ABOVE

Club Recognition Summary (CRS) is available to all Club Presidents and Club Secretaries on Rotary International Website "Member Access".

REMINDER – Calendar Year End Contribution Deadline Information

This is the time of year when our Rotarians need a gentle reminder of the various deadlines for their contributions to be credited to calendar year 2008. Please pass on the following information as soon as possible.

- | | |
|--------------------------------------|---|
| Checks to TRF Lockbox: | Must be postmarked December 31, 2008 and received at the lockbox no later than January 7, 2009 |
| Checks at World Headquarters: | Must be postmarked December 31, 2008 and delivered to the AR Dept (11 th Floor) by January 7, 2009 by 12:00 noon |
| Wire Transfers: | Must be initiated prior to December 31, 2008 and received in the bank by January 5, 2009 |
| Credit Cards: | On-line via www.rotary.org must be authorized prior to midnight on December 31, 2008 (Will only be credited to the Rotarian who logged in. No redistributions or corrections can be accepted for these gifts.)
Credit card contribution requests received in the lockbox deposits after December 31, 2008 will be considered January 2009 gifts.
Note: It is best to send credit card requests via fax to 847-556-2139 to ensure timely recording. |

Help your District Rotarians understand that any last minute disappointments can be avoided by getting contributions sent in well ahead of the December 31 calendar year end.

Contribution Update

The October 31, 2008 *Monthly Contributions Reports* (MCR) are now posted on the RI website at www.rotary.org. Please encourage all of the District and Club leadership to review their year-to-date contributions as well as their *Club Recognition Summary* (CSR) for the member specific contribution reports. Reviewing these reports on a monthly basis helps to ensure reporting accuracy. **Remember we only have 90 days following the gift date to re-classify (correct) the gift designation.** The November MCR should be posted on/about December 15.

October 31, 2008 Contribution Totals

Annual Programs Fund	Worldwide	\$ 23,875,288	+ 15.15% over 2007-2008
	Zone 27	\$ 382,052	- 12.40% from 2007-2008
PolioPlus	Worldwide	\$ 6,276,357	+ 528.02% over 2007-2008
	Zone 27	\$ 157,294	(includes all Restricted Giving)
Permanent Fund	Worldwide	\$ 2,493,569	- 11.67% (realized gifts only)
	Zone 27	\$ 105,502	(realized gifts only)

Encourage 2008-2009 Presidents and Secretaries to Use Member Access

I would ask each of you to contact your Club Presidents to ensure they have access to the Member Access Portal of the RI website. The current Club Secretary needs to go to their Club's "officer" section of the Member Access site. The Secretary simply needs to specify the 2009-2010 President and Secretary. Once this is done, the club officers will be included in the 2009-2010 Official Rotary International Directory. This information needs to be completed no later than December 31, 2008. Please have the Club Secretaries forward the same information to your DGE.

REMINDER - PolioPlus Website

Rotary has launched a new "mini" website to give the general public an opportunity to help end polio by contributing to Rotary's \$100 Million Challenge from the Bill & Melinda Gates Foundation. Please view the three-page site at www.rotary.org/endorpolio. The new site will be marketed throughout North America. All funds raised will go directly to The Rotary Foundation in support of polio eradication, helping Rotary fulfill its pledge to match the \$100 Million Challenge Grant received from the Gates Foundation. ***Rotarians are encouraged to help spread the word about the new website within their communities.***

Rotary's \$100 Million Challenge

Frank Goldberg, Past RI Treasurer, is serving as our Zone 27 "Rotary's \$100 Million Challenge Coordinator. Please encourage your District PolioPlus Chair to contact Frank at (h) 402-334-5872, (w) 402-390-0250 or e-mail at frandandleanne@cox.net for ideas that can be shared throughout your District. The eradication of the polio virus will be Rotary's greatest legacy. Every Rotarian in every Club should have the opportunity to be a part of our efforts. We will not stop until we have fulfilled our promise to the children of the world: eradicate polio.

Consideration of Surplus District Designated Fund

Each District is asked to review their District Designated Fund (DDF). The Rotary Foundation would appreciate it if you would consider donating a portion of your unused DDF to one or all of the following:

- Rotary's \$100 Million Challenge (is 20% a reasonable request?)
- Scholarship Fund Pool for Low Income Countries
- World Peace Fellow Program

YOUR Zone 27 Rotary Foundation Team

You are not alone in spreading the word about OUR Rotary Foundation to your District Rotarians. We have a team of Rotarians who are here to help you every step of the way. Please use us!

ZONE 27 CONTACT LIST 2008-2009

Zone 27 RRFC

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RFAC: Districts: 5650, 5950, 5960, 5970, 6000, 6220, 6250, 6270, 6420, 6440, 6450

Dave Buck

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Zone Challenge Coordinator: Districts 5650, 5950, 5960, 5970, 6000, 6220, 6250, 6270, 6420, 6440, 6450

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Regional Rotary Foundation Coordinator-Elect

Don Goering

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RRFC = REGIONAL ROTARY FOUNDATION COORDINATOR

RFAC = ROTARY FOUNDATION ALUMNI COORDINATOR

GIFT ADVISOR = ASSIST WITH ANNUAL & PERMANENT FUND DEVELOPMENT

THE ROTARY FOUNDATION STAFF

Anita Rieder

Annual Giving Officer

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CONTACT CENTER

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WHY IS THE “ASK” SO IMPORTANT?

Rotary Year	Number of Rotarians Contributing Worldwide	Percentage of Rotarians Contributing Worldwide	Total Contributions to Annual Programs Fund	Total Per Capita Giving
2007-2008	314,027	26%	\$ 113,273,669	\$ 95.13
2006-2007	293,336	25%	\$ 103,000,000	\$ 86.13
2005-2006	254,979	21.4%	\$ 92,600,000	\$ 77.00
2004-2005	232,767	19.5%	\$ 84,700,000	\$ 70.73
2003-2004	190,609	15.98%	\$ 70,500,000	\$ 58.14

This report presents a good news/bad news situation. Yes, our per capita giving has increased significantly since the inception of the Every Rotary Every Year effort. Yes, our total contributions to the Annual Programs Fund have increased dramatically since EREY began. Those are two milestones we should all be proud of. The remaining two columns should cause great concern for all of us. **We have close to 900,000 Rotarians who are not contributing to OUR Rotary Foundation.** That is also a significant number. And, we must change this. **We must ASK each and every Rotarian to support TRF, every year.**

BITS & PIECES OF INFORMATION

A. Future Vision Plan

- a. At their April 2008 meeting, the Trustees made a decision to encourage all Rotary Clubs and Districts to carry out projects and activities in the Future Vision Plan areas of focus in the years leading up to the global implementation of the plan. In keeping with this decision, all **Districts received a request for suggestions and assistance in**

- i. Identifying Colleges and Universities in your District that offer curricula in one or more areas of focus for Ambassadorial Scholars.
- ii. Other institutions or organizations that might support vocational training activities in one or more areas of focus for Group Study Exchange Teams.

The survey consists of ten questions and was sent to all District Rotary Foundation Chairs, Group Study Exchange Sub-committee Chairs and the Scholarships Sub-committee Chairs. If you do not recall receiving the survey, please let me know and I will forward it again, or you can feel free to contact Harvey Newcombe, TRF Educational Programs Division Manager, at harvey.newcombe@rotary.org for more information. Your assistance in completing this survey does not commit your District to participating as a Pilot District for the Future Vision Plan.

- b. **The Areas of Focus of the Future Vision Plan are:**

- i. Peace and conflict prevention/resolution
- ii. Disease prevention and treatment
- iii. Water and sanitation
- iv. Maternal and child health
- v. Basic education and literacy
- vi. Economic and community development

- c. **Types of Grants:**

- i. Rotary Foundation District Grants
Provide Districts with access of up to 50% of their DDF
- ii. Rotary Foundation Global Grants
Support larger projects with sustainable, high-impact outcomes in one of the six areas of focus

B. Preparation for Future Vision Plan Pilot District Program

- a. 128 Districts have indicated an interest in applying as Pilot Districts; 13 have indicated they will probably not apply.
- b. **The Pilot District Application will be posted on-line on January 27, with a deadline of May 15 for submission. (Early submission will not influence the final decision.)**
- c. All Districts who are interested in applying for the Pilot Program must provide the 2/3 approval of their Clubs with the application. It is not too early to present the Future Vision Plan to your Clubs now so they are prepared to vote in time to meet the May 15 deadline. More information will be forwarded to the DGE in the weeks to come.

d. All DG, DGE, DGN and DRFC will receive a sample letter to send to their Club Presidents. It will outline the timeline for participation in the Pilot Program and the basics of the FVP. You will also ask the Clubs to support the District's application to participate in the Pilot Program.

e. **Future Vision Plan Timeline:**

January 2009	Pilot District application is available on-line through Member Access
February-May 2009	Districts secure the agreement of 2/3 of their Clubs for participation in the Pilot Program, and submit the application form.
May 15, 2009	Deadline for Districts to submit applications. Applications must be filed on-line through Member Access no later than 5 p.m. CDT
June 1, 2009	The Foundation issues invitations to the Districts selected to serve in the Pilot Program.
June 10, 2009	Deadline for Districts to accept or decline invitation to serve as a Pilot District.
June 15, 2009	The Foundation announces selection of Pilot Districts.
June 21-24, 2009	The Foundation recognizes Pilot Districts during RI Convention.
January 2010	The 2010-2011 District Governors and DRFC of the selected Districts attend a mandatory training session at RP's expense.
February-June 2010	Incoming DG in Pilot Districts train 2010-2011 Club Officers (at PETS, District Conference or District Assembly), determine which grant activities the District will pursue in 2010-2011, and begin submitting grant applications on-line.
July 1, 2010	The Foundation begins awarding District Grants and Global Grants to Pilot participants. Pilot Districts are no longer eligible to receive awards from current Foundation programs.
2010-2013	Pilot District participate in Rotary Foundation District Grants and Global Grants and finish closing out all remaining Foundation grants from the current structure.

C. District Rotary Foundation Committee Meetings

- a. I had the pleasure of participating in District 6000's Annual Programs Fund Sub-committee meeting in October. Approximately 10 committee members were in attendance. The focus of the meeting centered around how to engage all the Rotarians in the District to support fund development of TRF as well as getting their Clubs actively involved in the programs of OUR Foundation. Assisting Clubs in making the connection between giving and getting will lead to more contributions and more Matching Grants, more applications for GSE team members and more active involvement in the recruiting of Ambassadorial Scholars and World Peace Fellow applications. The committee, consisting of leaders from throughout the District, is planning to present programs to every Club within the Rotary year. Their programs will be tailored to each specific Club, to help the members better understand what their contributions have done or can do to achieve the goals of The Rotary Foundation.
- b. How ACTIVE is your District Rotary Foundation Committee?
Have you met? Do you intend to meet? Do you have goals for the year? Are you on track to achieve those goals? Are your Sub-committee Chairs making presentations to the Clubs? Have you considered teleconferencing for your committee meetings? Have you had any conference calls to address your goals? Are you sharing the Monthly Contribution Reports with your Clubs? Do they know where they stand for the year? Are you leading your Clubs to better understand OUR Rotary Foundation?

D. District Governors-elect and Club Goal Forms

Will not be distributed until late January. It is important to let your Club Presidents-elect know now that you will need to have their Club Goal Forms completed and returned no later than PETS. Please start to share the need to plan for the Club Goals with your Clubs now. A five-year history (Club-by-Club) will be sent to the DGE separately. Goals to be completed on the newly created forms will be:

- Every Rotarian Every Year (Annual Programs Fund)
- \$100 Million Challenge Club Goal
- Permanent Fund

Your assistance in preparing your Clubs to submit their goals in a timely manner will help them to achieve their goals.

E. Year-end Gifts to The Rotary Foundation

- a. **IRA Rollover** http://www.rotary.org/RIdocuments/en_pdf/nuture_dream_ira.pdf
Please promote the benefits of making charitable IRA Rollovers to TRF among Rotarians eligible under the provisions of the Emergency Economic Stabilization Act. Our Rotarians can consider a Charitable IRA Rollover gift if:
 - You are at least 70 ½, AND
 - You do not need the additional income generated by the required minimum distribution, OR
 - You do not itemize deductions, OR
 - You want to use unneeded assets to secure a Rotary legacy with the gift of a lifetime.
- b. **Charitable Gift Annuity** is a simple contract between you and The Rotary Foundation. In exchange for your irrevocable gift of cash, securities or other assets, The Rotary Foundation agrees to pay you or 1-2 other annuitants a fixed sum each year for life. The older your designated annuitants are at the time of the gift, the greater the fixed income The Rotary Foundation can agree to pay. In most cases, part of each payment is tax-free, increasing each payment's after-tax value. Payments can be made annually, semi-annually, or quarterly.
- c. **Deferred Gift Annuity** is also a simple contract between you and The Rotary Foundation. In exchange for your irrevocable gift of cash, securities, or other assets, The Rotary Foundation agrees to pay you or 1-2 other annuitants a fixed sum each year for life, with payments starting at least one year after your gift. The older your designated annuitants are at the time of the gift, the greater the fixed income The Rotary Foundation can agree to pay. In most cases, part of each payment is tax-free, increasing each payment's after-tax value. Payments can be made annually, semi-annually, or quarterly.
- d. **Charitable Remainder Trust** is a gift defined by the federal tax law that allows you to provide income to yourself or others for life or a term of years while making a generous gift to The Rotary Foundation. As a unitrust donor, you irrevocably transfer assets, usually cash or securities, to a trustee of your choice (for example, The Rotary Foundation or a bank trust department). During the unitrust's term, the trustee invests the unitrust's assets. Each year, the trustee distributes a fixed percentage of the unitrust's value, as revalued annually, to you or other income beneficiaries named by you. Payments must be at least 5% of the trust's annual value and are made out of trust income, or trust principal if income is not adequate. Payments can be made annually, semi-annually, or quarterly. When the unitrust term ends, the unitrust's principal passes to The Rotary Foundation, to be used for the purpose you designate.
- e. **Bequest Society**
Allows you to include The Rotary Foundation Permanent Fund in your estate plans. You can set up your estate to contribute a specific amount, a percentage of your estate, or make TRF a beneficiary of a Life Insurance policy.
- f. If you are so inclined, you can **designate your gift to benefit the SHARE system**, whereby 50% of the earning are returned to your District Designated Fund. Your gift will not only benefit the mission of The Rotary Foundation into perpetuity, but will also benefit your District into perpetuity.
- g. **For more information and assistance, please feel free to contact our Major Gifts Officer, Jamie Revord at jamie.revord@rotary.org.**



To laugh often, to win the affection of children, to earn the appreciation of honest critics and endure the betrayal of false friends, to appreciate beauty, to find the best in others, to leave the world a bit better, whether by a healthy child, a garden patch...to know even one life has breathed easier because you lived. This is to have succeeded!

-Emerson