



# THE ROTARY FOUNDATION

## Zone 27 Communication

Districts 5650, 5950, 5960, 5970, 6000, 6220, 6250, 6270, 6420, 6440, 6450 & Welcoming District 5580

Foundation News for Rotary Districts and Rotary Clubs  
January 2009

### OUR ROTARY FOUNDATION UPDATE 2008-2009

District	07-08 Total	08-09 Goal	08-09 Total	% of Goal	/Capita	Polio Challenge	Perm Fund
D5580	\$ 329,193	\$ 330,054	\$ 79,380	24.05%	\$ 24.43	\$ 39,292 24/66	0
D5650	\$ 217,866	\$ 197,976	\$ 64,166	32.41%	\$ 26.96	\$ 12,839 23/45	0
D5950	\$ 913,784	\$ 750,325	\$ 92,712	12.36%	\$ 30.63	\$ 13,576 26/61	0
D5960	\$ 343,422	\$ 318,324	\$ 77,142	24.32%	\$ 23.30	\$ 97,945 59/64	\$ 300,000
D5970	\$ 242,407	\$ 226,639	\$ 52,168	23.02%	\$ 17.58	\$ 30,232 32/56	0
D6000	\$ 452,457	\$ 427,077	\$ 118,168	27.67%	\$ 27.91	\$ 55,166 36/62	\$ 89,337
D6220	\$ 176,197	\$ 112,915	\$ 37,003	32.77%	\$ 18.77	\$ 16,688 18/41	0
D6250	\$ 234,361	\$ 298,850	\$ 65,153	21.80%	\$ 19.03	\$ 65,319 37/61	\$ 586,255
D6270	\$ 230,941	\$ 293,160	\$ 63,165	21.55%	\$ 19.02	\$ 208,806 50/60	0
D6420	\$ 170,262	\$ 6,140	\$ 43,472	708.01%	\$ 19.57	\$ 26,993 25/49	0
D6440	\$ 424,200	\$ 355,130	\$ 57,851	16.29%	\$ 21.76	\$ 152,890 41/72	\$ 1,214
D6450	\$ 326,066	\$ 242,005	\$ 54,719	22.61%	\$ 23.71	\$ 29,276 31/65	\$ 100
<b>TOTALS</b>	<b>\$3,731,963</b>	<b>\$3,228,541</b>	<b>\$ 725,719</b>	<b>23.48%</b>	<b>\$ 22.57</b>	<b>\$ 749,022</b> 378 / 636 participation <b>Goal: \$1,908,000</b> (Based on \$3,000/Club –December 2007-2010)	<b>\$ 976,906</b>

*The Permanent Fund contributions only include realized gifts only.*

#### Notes:

- 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 prepare for our new Zone alignment.
- The "Restricted Giving" column has been changed to the Rotary's \$100 Million Challenge donations. The 0/0 ratio includes the number of Clubs that have contributed as compared to the number of Clubs in each District, since December 1, 2007 through November 30, 2008. Please note that the total shown includes any District contributions as well as all individual Club contributions.

**All information included in this report reflects contributions through November 30, 2008**

#### **Financial Update for 2008 from General Secretary Ed Futa, December 30, 2008**

The current investment climate continues to present challenges to our organization. Since September 30, Rotary International's General Fund declined another 16.1%, resulting in a fiscal year-to-date investment loss of 24%, or \$22M. The Rotary Foundation's investments (except for the PolioPlus Fund) also have experienced declines in line with the markets, resulting in losses of \$165M from July-November. As we previously reported, nearly all losses are unrealized (i.e., due to declines in the market prices of the securities held and would be realized only if the securities are sold.) Because Rotarians have continued to pay their dues on time and make generous contributions to TRF, we have not had to sell any of our investment securities to meet operating expenses.

You have likely read about the securities fraud committed by Bernard Madoff. Through one of its hedge fund managers, TRF had minor exposure (less than 0.1% of the Foundation's total investment) to one of Madoff's investment vehicles. We are working with our independent investment consultants to minimize this loss and reduce Rotary's risk in this area.

Investment earnings, and if necessary, operating reserves, are used to fund a portion of RI's operating expenses, and all of TRF's operating expenses. While RI's reserves remain above the Board's targeted level, the Foundation's reserves have declined significantly below the level required by the Trustees. Therefore we, (your Board of Directors and the Trustees of The Rotary Foundation, and your Secretariat staff) have been reducing spending and are taking the following actions:

- Deferring all non-essential activities, including committee meetings;
- Cancelling all non-essential discretionary spending, including staff and volunteer travel, overtime expenses, temporary help, consultants and staff development;
- Reducing staff and volunteer costs while traveling on Rotary International and Foundation business; and
- Preparing contingency plans and austerity budgets for 2009-2010

Rotary's senior leaders, the Financial Services staff, Rotary's investment consultants and I (Ed Futa) continue to closely monitor the financial markets. We are taking all possible steps to ensure that Rotary remains financially strong in this difficult economic environment.

## **Zone 27 Leads the World in Giving to the Permanent Fund (through November)**

Thanks in large part to two significant gifts, Zone 27 leads the world in giving to the Permanent Fund of OUR Rotary Foundation. A \$500,000 gift was received from the estate of a former member of the Stoughton Rotary Club (District 6250) and a \$300,000 gift was received from the estate of a former member of the Roseville Rotary Club (District 5960). The donors understood the impact their gifts would have. They understood how many dreams would be made real through their contributions. In the memory of these past Rotarians we thank them for their generosity in remembering The Rotary Foundation in their estates.

## **\$1,942,355 in Total Giving to The Rotary Foundation (through November)**

Zone 27 Rotarians have contributed \$1,942,355 which places our Zone 7<sup>th</sup> in total giving to The Rotary Foundation (including Annual Giving, Permanent Fund Gifts, \$100 Million Challenge and Restricted Giving). Thank you all for ***Making Dreams Real*** for those less fortunate than ourselves. Without your leadership and ongoing support of OUR Foundation, millions of children and families would be without safe and clean water, food, education, healthcare and shelter. Please continue to share these success stories with your District's Rotarians. We cannot stop now. There is so much to do.

## **Review of your District's MONTHLY CONTRIBUTION REPORT**

- a. Are your Club's contributions on target to achieve their goals?
- b. Have you personally contacted all Clubs who have yet to contribute to the Annual Programs Fund (APF)?
- c. Please make sure that all contributions are sent to the correct address. While our current address is nearly 2 ½ years old, we still have many Clubs sending their member's contributions to an old address. This only adds to the delay and disappointment when gifts are not credited properly. Please share this address in every way possible.

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

- d. Contact your fellow District Governors whose clubs are achieving their goals-find out what are they doing?

## **OUR Rotary Foundation's Goals for 2008-2009**

On July 1, 2009, Rotary Foundation Trustee Chair, PIRP Jonathan Majiyagbe wrote, "In anticipation of the coming Rotary year, I would like to share with you some highlights of the 2008-2009 program and seek your continued full support for the programs of The Rotary Foundation...Thank you in advance for your generous and lasting support for The Rotary Foundation, bearing in mind that (by) working together we can ***Make Dreams Real***." Additionally, Trustee Majiyagbe shares with us WHY GOALS ARE IMPORTANT: "The Rotary Foundation is a large and successful international organization. Its many accomplishments are realized through the efforts of individual Rotarians, their Clubs and Districts. Our mission to achieve world understanding and peace is a lofty goal that can only be met through sustained action and the commitment of (all) Rotarians...**Goal setting helps us determine our priorities, get organized, make big decisions and realize our dreams. When goals are specific, manageable and achievable, goals have the power to motivate and to foster commitment.**" As a reminder, our 2008-2009 Rotary Foundation Goals are:

1. Keep our promise to eradicate polio.
2. Embrace the two pillars of support for The Rotary Foundation: the Annual Programs Fund through the Every Rotarian Every Year effort and the Permanent Fund.
3. Participate in Your Foundation/Our Foundation, a “lend a hand” program for sharing funds from Club and District Foundations to permanently establish the Rotary World Peace Fellows program and support global polio eradication.
4. Enhance Rotary’s Public Image.
5. Support the Future Vision Plan of The Rotary Foundation.

As we begin the second half of our ***Make Dreams Real*** Rotary year, I would ask all of you to review the 2008-2009 TRF Goals to ensure that we are on course. Continue to lead your Clubs through your support and motivation. Please make sure that your messages to your Clubs include OUR Rotary Foundation goals. Review your District’s Monthly Contribution Report to see where you stand in light of your goals. Use the remaining time you have in this year to achieve the goals that you set (and conveyed to your Clubs) at the beginning of the year.

## **Storytelling Techniques (from RRC Training 2008)**

The best way to “share” The Rotary Foundation is to share the programs of The Rotary Foundation. We don’t ASK for money, we **ASK our Rotarians to SUPPORT WHAT THE MONEY DOES**. The easiest way to share the stories of TRF is to utilize current and past program participants. Provide your Clubs with contact information for TRF Alumni who experienced the importance of OUR Foundation in their lives. Alumni include, Ambassadorial Scholars (outbound or inbound), World Peace Fellows, Group Study Exchange (GSE) Team leaders and Team members and Volunteer Service Grant participants. Additionally, we have thousands of Rotarians in our midst who are passionate about The Foundation. Ask them to share their passion with others in your District. And, what about you, what is your passion for The Foundation? At the end of a presentation, always ASK for a commitment to support TFF. Following are some suggestions for effective storytelling:

### **Effective Storytelling**

- Well developed and well practiced
- Holds interest of the audience
- Reach the listener
- Use stories that touch you and the listener

### **Characteristics of a Good Story**

- Single theme, clearly defined
- Well developed plot
- Style; vivid word pictures, pleasing tone of voice and rhythm
- Who are the characters
- Faithful to the source (quotes/stories)
- Dramatic appeal
- Make message appropriate to the listener

### **Adapt to the Audience**

- Take the story as close to them as you can
- Keep the story brief and simple
- Stimulate the senses; allow the listener to feel, smell, touch and see the vivid picture you create
- Describe the characters and setting

### **Preparation**

- Write your story
- Read and practice it
- Research, if necessary, for background, accuracy and cultural meaning
- Live with your story until the characters and setting become as real to you as the people and places
- Visualize it; imagine the sounds, tastes, scents, colors

### **Conclusion**

- The more you practice, the more skilled you will become
- Experiment with different types of presentations

## **Rotary's \$100 Million Challenge**

The Zone 27 TRF report shown on the top of this newsletter now includes contributions to Rotary's \$100 Million Challenge. Behind the contribution totals you will find a 00/00 number. This represents the number of Club Contributions/Total number of Clubs in the District. You will find that several Clubs have yet to include the Polio Challenge in their giving. As District leaders, I would ask that you continue to encourage all Clubs to create fundraising activities for the challenge effort that include raising the awareness of Polio Eradication in their communities. Please contact our Zone Challenge Coordinator, Frank Goldberg, at (h) 402-334-5872, (w) 402-390-0250 or e-mail at [frandandleanne@cox.net](mailto:frandandleanne@cox.net) if you have successful projects that you are willing to share or if you are in need of project ideas.

## **PolioPlus District Report**

The PolioPlus District Report is now available to all Districts via Member Access on the Rotary Website at [www.rotary.org](http://www.rotary.org). The report is shown at the bottom of the same "page" as your Monthly Contribution Report. This is a "live" report, meaning that all contributions are posted as soon as they are recorded at TRF. The first column will show you those contributions received in the month, total contributions for the current Rotary year and finally, total contributions for the \$100 Million Challenge since December of 2007. Please note, at the end of the report, any District Designated Fund (DDF) contributions are also listed. *(It would be helpful if your PolioPlus Chair sees this report on a regular basis to assist in tracking Club support.)*

## **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**

<b>Club Name and Club Number District Number</b>		
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
<b>TOTAL</b>		<b>TOTAL of ABOVE</b>

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

## Contribution Update

The November 30, 2008 *Monthly Contributions Reports* (MCR) are posted on the RI website at [www.rotary.org](http://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 December MCR should be posted on/about January 15.

### November 30, 2008 Contribution Totals

<b>Annual Programs Fund</b>	Worldwide	\$ 31,191,580	+ 9.145% over 2007-2008
	<b>Zone 27</b>	\$ 725,719	- 3.34% from 2007-2008
<b>PolioPlus</b>	Worldwide	\$ 8,026,488	
	<b>Zone 27</b>	\$ 749,022	Since December 2007
<b>Permanent Fund</b>	Worldwide	\$ 3,834,661	- 9.43% (realized gifts only)
	<b>Zone 27</b>	\$ 976,906	<b>Zone 27 leads the WORLD</b> (realized gifts only)

### Consideration of Surplus District Designated Fund

As we cross the threshold to the 2<sup>nd</sup> half of the *Make Dreams Real* Rotary year, 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% of your DDF a reasonable request?)
- Scholarship Fund Pool for Low Income Countries
- World Peace Fellow Program

### LET EVERY ROTARIAN MAKE THEIR OWN DECISION to SUPPORT TRF

Often, we look at our long-standing members and say, "They have already 'given' through their many years of service, they won't want to support the Every Rotarian Every Year effort"; we look at our new, younger members and say, "They have too many obligations with their early careers and young families, we can't ask them to support the Every Rotarian Every Year effort of OUR Rotary Foundation". I would like to share two very special stories with you. About four years ago when EREY started, I asked one of our new (and young) members if he would be willing to support TRF through Every Rotarian Every Year. After I shared some stories of The Rotary Foundation with him, he said, "What do you need"? I said, we are asking each member to contribute at least \$100 on an annual basis". He said, "I can do that". When I thanked him, he said, "No, thank you for asking". Just this past November, I asked all of our Club members to consider increasing their personal gifts to The Foundation by at least 10%. Like so many other Clubs, we all take turns serving as "greeters" to members and visitors at each weekly Club meeting. I had the opportunity to serve as co-greeter with one of our newer members. During the course of our responsibilities, my co-greeter said, "Is it OK if I just write you one check a year for TRF? It is easier for me to do that than have it added to my quarterly dues". I told him The Foundation was happy with anything he would be comfortable with. At the end of the meeting, he gave me a check. Before I left the office that Friday I took his check out of my pocket so that I could get it in the mail. The \$200 check was sent to TRF to be included in our December giving. Both of these gifts are examples of young members who are young professionals with young families. If I had decided they wouldn't support The Rotary Foundation, I would have made the decision for them...when they could and would (willingly) make the decision for themselves. PLEASE, do not make decisions for others. We must ASK every Rotarian if they would be willing to support OUR Rotary Foundation. Let's not take the opportunity away from any Rotarian. **We must ASK each and every Rotarian to support TRF, every year.**

### WHY WE ARE "ASKING" EVERY ROTARIAN TO SUPPORT OUR ROTARY FOUNDATION

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

As you can see, we have a lot of "ASKS" left to make. Let's make sure that ALL of our Rotarians are asked. Thank you.

## **Values of The Rotary Foundation**

I stole the **RESPECT** idea from another organization and plugged in my own thoughts. I hope that you will consider these values when you are sharing OUR Rotary Foundation with your members.

- R**esponsiveness (Let's be responsive to questions, the need for assistance, the willingness to share our knowledge.)
- E**xcellence (Make sure that all Rotarians understand that the stewardship of their gifts is our #1 priority.)
- S**ensitivity (Our gifts are personal; take your donor's feeling into consideration.)
- P**assion (You want your District Rotary Foundation Committee to be able to tell the "stories" of TRF.)
- E**mpowerment & Teamwork (Be sure that all of your District TRF Team is adequately trained and then let them go.)
- C**ultural Understanding (As Rotarians we forget what makes us different and celebrate what makes us the same.)
- T**hank You (We need to make every effort possible to thank all Rotarians for their thoughtful gift to TRF.)

## **FUTURE VISION PLAN – FOR YOUR CONSIDERATION**

### **Tips for considering to apply to be a Future Vision Pilot District**

1. Learn what the guidelines will be as a Pilot District under Future Vision Plan and what the guidelines will be if you are not a Pilot District during the Pilot Program.
2. If your District is active in Group Study Exchange, be sure you understand the new Future Vision Plan for Vocational Training Teams and understand their impact on your District during the Pilot Program.
3. If your District is active with the University Teacher Grant Program be sure you understand that not being a Pilot District will prevent you from supporting a University Teacher Grant during the Pilot Program. *(This program will be phased out globally in 2011-2012.)*
4. If your District is active with the Ambassadorial Scholarship Program, be sure you understand the new Future Vision Plan for Scholarships and understand their impact on your District during the Pilot Program.
5. If your District is active with Volunteer Service Grants, be sure you understand that not being a Pilot District will prevent you from supporting a Volunteer Service Grant during the Pilot Program.
6. Look at any major ongoing international project relationships the Rotarians and Clubs in your District have, and ask the Clubs involved to determine if the District where the project is located is likely to apply to be a Pilot District.
7. Remember that, although your District will be able to wrap up existing Matching Grants and 3H Grants, during the Pilot Program period (2010-2013) Pilot Districts will only be permitted to partner with other Pilot Districts for grants, both Club and District Developed, and Packaged Grants. *(3H Grants will be phased out globally in 2011-2012.)*
8. Determine the impact on your District during the Pilot Program (2010- 2013); if your District and the Districts your Clubs frequently partner with, choose differently regarding being a Pilot District.
9. As a Pilot District, Matching Grants will require projects to be larger to secure a Foundation match (Global Matching Grant must meet a \$15,000 award minimum), consider how your District will approach partnering Clubs together to support these larger international "Global Matching Grant" Projects. Consider how you might design Global Grant Projects that could take place in your district that fit within the 6 areas of focus.
10. Test budget your District's 2010-2011 allocation of DDF and access to World Fund funds under the Future Vision Plan as a Pilot District, and test budget your District's 2010-2011 allocation of DDF as a District not operating under Future Vision Plan during the test period.
11. Consider how working within the Future Vision Plan will impact your District's support of and its enthusiasm for the Foundation during the Pilot Program.
12. Determine whether it is best for your District to be a Pilot District or not to be a Pilot District during the Pilot Program.

13. Keeping in mind when the Pilot Program is over, all Districts will be following the Future Vision Plan and determine if your District leaders want to be part of the Pilot Program and shaping the Future Vision Plan, which will be in effect as of July 1, 2013.

These tips were gathered after extensive email communications among PDG Mac Leask, Harvey Newcomb III and other members of the D-7980 and TRF Foundation teams. Please continue to monitor the RI website at <http://www.rotary.org/EN/MEMBERS/RUNNINGADISTRICT/FUTUREVISIONPILOTPROGRAM/Pages/rdefault.aspx> for the latest information about the pilot phase of the Future Vision Plan.

Harvey Newcomb III

Pilot District Selection Team Leader, Educational Programs Division Manager, The Rotary Foundation of Rotary International  
(Provided by John K. Best, RRFC-Zone3 1, edited by MB Growney Selene, RRFC-Zone 27)

## **TIMELINE FOR THE FUTURE VISION PLAN OF THE ROTARY FOUNDATION**

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 RI'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.

## **YOUR DISTRICT ROTARY FOUNDATION COMMITTEE**

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 your Clubs know where they stand for the year?

Are you leading your Clubs to better understand OUR Rotary Foundation?

## **District Governors-elect and Club Goal Forms**

The **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) was 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.

## **Humanitarian Grant Reporting Update**

In November, the **FILE ACTIVITY REPORTS** were sent to all District Governors, District Foundation Chairs and District Grants Sub-committee Chairs. The Trustees have established a policy that all Districts must maintain minimum current grant reporting of 70%. I am happy to report that as a Zone, we are current on 80% of our open grants. We have one District just slightly below the acceptable level. As mentioned elsewhere in this newsletter, stewardship is our #1 priority. It sets us apart from so many other organizations. It is our responsibility as District leaders to help our Clubs understand that

when they accept funds from TRF, they also assume an obligation to meet the requirements that come with those funds. As of October, we had 137 open grants and 110 of those grants are current in their reporting. Congratulations to all Districts on your ongoing due diligence. Following are some frequently asked questions regarding the World Reporting Analysis (updated May 2007):

- Q** What grants are included in the World Reporting Analysis?  
**A** All approved Matching Grants, District Simplified Grants, 3-H Grants, Volunteer Service Grants and phased-out grants that have received partial or full payments of grant funds.
- Q** How are the World Reporting percentages calculated?  
**A** Percentages include all grants that are open at the time of the analysis (one month prior to the April and October Trustees meetings) and have received partial or full payment, but have not yet met closure requirements.
- Q** When is my report due?  
**A** Progress reports are due every 12 months from the payment date of the grant, and within every 12 months of the most recent acceptable Progress Report. A complete Final Report is due within two months of the project's completion.
- Q** If my District is below 70% on reporting for one analysis, can we continue to apply for new grants?  
**A** At this time, yes. However, the Trustees will re-evaluate this at their April 2008 meeting. Therefore, it is in the District's best interest to maintain reporting compliance above 70%. The regular grant criteria requirements will stay the same: Clubs which are current with reporting on their Club-sponsored projects may apply for new grants, and the District may apply for new grants if their District-sponsored projects are current.
- Q** My District was below 70% current on reporting. How much time do we have to increase our reporting percentage?  
**A** Overdue reports must be completed and submitted to TRF immediately. The next World Reporting Analysis will occur approximately one month before the April Trustee meeting, however, please allow time for your report to reach TRF and undergo the review process. It is possible that further information may be required to complete your report for it to be accepted.
- Q** My Club/District is the International Sponsor for our Matching Grant or 3-H Grant project. Why are we responsible for project reporting?  
**A** Project reporting is the responsibility of both the Host and International Sponsors for Matching and 3-H Grants. MG and 3-H Grants are awarded to two partners as international partnership is a main guideline set forth by the Trustees of The Rotary Foundation. If you are having trouble communicating with your co-sponsor, please notify your Grant Coordinator.
- Q** Why is my Club/District's overdue Matching Grant keeping my District from having a District Simplified Grant approved?  
**A** As of July 1, 2006, any overdue grant sponsored by a Club will prevent *all* grant types from that Club from being processed. If the overdue project is District-sponsored, District-sponsored grants will not be processed until overdue reports are submitted.
- Q** I have submitted part of my project's report. Why is the grant listed as overdue?  
**A** The project report must be complete to be accepted. Your Grant Coordinator will notify the project sponsors if further information is needed to complete your submitted report. The report will not be accepted until all reporting requirements have been fulfilled.

## **Changes to the Foundation Recognition Program**

### **What changes are being made to The Foundation recognition programs?**

- ◇ **Foundation Recognition Points** and recognition amounts will only be transferred for **transactions of 500 points** or more
- ◇ Paul Harris Fellow medallions will not be provided automatically, but will be available for purchase.
- ◇ The individual donor will be the only person authorized to transfer Foundation Recognition points.
- ◇ Foundation recognition points will expire upon the death of the donor or the death of the surviving spouse of a Major Donor (\$10,000+).

### **When will the changes to the recognition process take effect?**

- ◇ The new policies will take effect on July 1, 2009.

### **Why are these changes being made?**

- ◇ It has long been the wish of The Rotary Foundation Trustees to simplify The Foundation's programs and allow more resources to meet donors' expectations. The Future Vision Plan and these changes are intended to simplify the recognition program and. Therefore, make The Foundation a more efficient, timely and cost-effective steward of the gifts of many Rotarians and non-Rotarian donors.

**Will Club Presidents still be able to transfer Foundation Recognition Points from members' IDs?**

- ◇ Historically, Rotary Club Presidents have been allowed to authorize the transfer of Foundation Recognition Points from the IDs of current and former members of their Club. Once this change is implemented, only the individual donor may transfer Foundation Recognition Points from their ID.

**What does it mean that Foundation Recognition Points expire upon the death of the donor or the death of the surviving spouse of a Major Donor?**

- ◇ Because only the donor will be authorized to transfer Foundation Recognition Points, any remaining points will expire after the donor's death. A surviving spouse of a Major Donor, however, may still authorize transfers on the donor's behalf.

**What does the new 500 point threshold for transfers mean?**

- ◇ Though individuals, Clubs and Districts may still transfer Foundation Recognition Points to name new Paul Harris Fellows and present further Paul Harris recognition awards, the minimum transfer from an account will be 500 points. Transfer requests of less than 500 points, or Paul Harris Fellow recognition amounts, will not be processed.

**What does it mean that Paul Harris Fellow medallions will be available for purchase?**

- ◇ The standard recognition materials will no longer include the current Paul Harris Fellow medallions. This item is optional and will be shipped only by special order. Recognition practices will be assessed on an ongoing basis to ensure the goals of the organization are achieved.

**What will the Paul Harris Fellow Recognition Kit include?**

- ◇ The pin in a small box and the certificate. Medallions will be shipped separately upon order. Medallions can be ordered any time via [www.shop.rotary.org](http://www.shop.rotary.org).

**What will happen when you transfer 500 points to an individual with a recognition amount of 800 already in their account? And, will that person have 300 recognition points beyond their first Paul Harris?**

- ◇ The transfer of points from another source (individual, Club or District) adds to an individual's recognition credit amount to bring them to 1300. Their Foundation Recognition Points "balance" is still zero because the transfer of points was not a personal contribution and therefore does not earn Foundation Recognition Points. If the account holder contributes an additional \$1,000 on top of their \$1,300 recognition total, the recognition credit balance will be \$2,300 and they 1,000 points to transfer to another individual.

**Can I still send a \$100 (cash) contribution to TRF and name another individual?**

- ◇ Contributions of any increment will still be accepted and receipts can be named with cash contributions at the time of the gift in any amount.

**What effect are these changes having on Foundation Recognition Points in Club accounts?**

- ◇ No changes have been made to the administration of Club points, nor will they expire at any time (minimum 500).

**BOTTOM LINE**

- ◇ As District leaders, we must get this message out to all of our Club leaders.
- ◇ This is a great incentive for those with lower levels of Foundation Recognition Points to use them as incentives for those members who are not yet supporting OUR Rotary Foundation.
- ◇ Contact former members and ask them to release their Foundation Recognition Points to be used for incentives.
- ◇ Be creative and use these changes as a positive force to support TRF in your District and Clubs.



**LUCK is when PREPARATION meets OPPORTUNITY.**

-Legendary NFL Football Coach Vince Lombardi