



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
March 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	\$ 332,554	\$ 131,588	39.57%	\$ 40.50	\$ 42,055 27/66	0
D5650	\$ 217,866	\$ 197,976	\$ 109,416	55.27%	\$ 45.97	\$ 17,349 28/45	\$ 125
D5950	\$ 913,784	\$ 724,825	\$ 321,427	44.35%	\$ 106.19	\$ 19,531 27/61	\$ 8,292
D5960	\$ 343,422	\$ 318,324	\$ 162,212	50.96%	\$ 48.99	\$ 117,105 60/64	\$ 302,036
D5970	\$ 242,407	\$ 226,639	\$ 84,667	37.36%	\$ 28.54	\$ 48,149 34/56	0
D6000	\$ 452,457	\$ 427,077	\$ 246,543	57.73%	\$ 58.23	\$ 62,069 38/62	\$ 150,876
D6220	\$ 176,197	\$ 112,915	\$ 59,615	52.80%	\$ 30.25	\$ 28,620 21/41	\$ 100
D6250	\$ 234,361	\$ 273,350	\$ 104,419	38.20%	\$ 30.50	\$ 74,354 38/61	\$ 586,255
D6270	\$ 230,941	\$ 293,160	\$ 123,790	42.23%	\$ 37.27	\$ 216,156 51/60	\$ 1,000
D6420	\$ 170,262	\$ 157,175	\$ 74,511	47.41%	\$ 33.55	\$ 33,858 29/49	0
D6440	\$ 424,200	\$ 352,730	\$ 162,836	46.16%	\$ 61.38	\$ 178,310 48/72	\$ 21,722
D6450	\$ 326,066	\$ 242,005	\$ 91,389	37.76%	\$ 39.60	\$ 31,006 32/65	\$ 10,100
TOTALS	\$3,731,963	\$3,326,176	\$ 1,540,825	46.39%	\$ 47.32	\$ 826,507 thru 1-31-09 406 / 636 participation Goal: \$1,908,000 (Based on \$3,000/Club -December 2007-2010)	\$ 1,080,506

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 January 31, 2009. 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 January 31, 2009

Clubs Making Dreams Real Through Their Annual Giving Contributions

District	Highest Giving Club/Capita	Membership	Goal	Thru 1-31-09	Per Capita	# < \$10.00/Capita/#Club/# Members
D5580	Central Lakes-Pequot Lakes, MN	23	\$15,000	\$7,958	\$ 346.00/capita	28/66 Clubs / 3249 Members
D5650	Wilbur, NE	9	1,000	820	91.11/capita	12/45 Clubs / 2380 Members
D5950	Minneapolis City of Lakes, MN	92	35,350	29,955	325.60/capita	11/61 Clubs / 3027 Members
D5960	Roseville, MN	80	25,000	26,555	331.94/capita	29/64 Clubs / 3311 Members
D5970	Dubuque Key City, IA	11	0	2,780	252.73/capita	24/56 Clubs / 2967 Members
D6000	West Liberty, IA	33	7,632	8,100	245.45/capita	8/62 Clubs / 4234 Members
D6220	Waupaca Breakfast, WI	54	6,000	8,113	150.24/capita	22/41 Clubs / 1971 Members
D6250	Menomonie Sunrise, WI	35	3,800	2,500	71.43/capita	26/61 Clubs / 3424 Members
D6270	Two Rivers, WI	31	3,500	4,274	137.87/capita	25/60 Clubs / 3321 Members
D6420	Quad Cities, IL	22	2,200	2,690	122.27/capita	20/49 Clubs / 2221 Members
D6440	Wheeling, IL	22	4,800	7,650	347.73/capita	20/71 Clubs / 2653 Members
D6450	Darien, IL	30	15,000	8,298	276.58/capita	31/65 Clubs / 2308 Members

What Can We Learn From These Reports?

The January *Monthly Contribution Reports* (MCR) are posted on the Member Access area of the RI Website. Please review your District reports with your District Rotary Foundation Committee and District Leadership Team. **Congratulations to those Clubs highlighted above. Thank you for making The Foundation an important part of your Club's goals.**

These Clubs set a tremendous example for all of us as we continue to promote the importance of **Every Rotarian** supporting The Rotary Foundation **Every Year**. As you can see in the reports shown above, we still have many Rotarians in our Zone 27 who have not been ASKED to support OUR Rotary Foundation. Please continue to ask your Club Presidents and Club Foundation Chairs to review their Club Recognition Summary (CRS) reports on a regular basis. These reports should also be reviewed for accuracy. Reminder: We have 90 days from the date of a gift to modify (reclassify) any gifts (i.e. change from Annual Programs Fund to PolioPlus, etc.). How do we increase our giving?

1. If you look closely at your MCR, you will see which of your Clubs need your assistance. Have you as DG and DRFC and District Annual Giving Sub-committee Chair made a personal contact with each of these Clubs? What types of responses have you received?
2. Year to date, Zone 27 **giving to the Annual Programs Fund is down 13.49%**.
3. We have **228 of 635 Clubs in our Districts that have contributed less than \$10.00/capita**.
4. If each of these Clubs gave (only) \$1,000, our total giving would increase by \$228,000 and would put us equal to our 2007-2008 YTD giving through January.
5. Our DGE and DRFC need to look seriously at these reports as you continue to plan the TRF sessions of our upcoming PETS. We must give our PE the confidence they need to set challenging and realistic goals for the 2009-2010 Rotary year. The ***FUTURE OF ROTARY IS IN THE PRESIDENTS-ELECT HANDS***.
6. **WE MUST ASK EVERY ROTARIAN TO SUPPORT OUR ROTARY FOUNDATION.**

Zone 27 (still) Leads the World in Giving to the Permanent Fund (through January)

With total gifts of \$ **1,080,506**, Zone 27 continues to lead the world in Permanent Fund contributions to OUR Rotary Foundation. Thank you for all of your efforts in increasing the awareness of the Permanent Fund with your District Rotarians. A gift to the Permanent Fund allows our donors to have their gift live forever. When discussing a gift, please remind your donors that they can dedicate their gift to the "SHARE" program, allowing one-half of the annual earnings to be returned to your District Designated Fund (DDF) to be used on an ongoing basis to support your District projects and TRF programs.

\$3,108,019 in Total Giving to The Rotary Foundation (through January)

Zone 27 Rotarians have contributed \$3,108,019 (an increase of \$814,183 in "total giving" over the same time period in 2008) including Annual Giving, Permanent Fund Gifts, \$100 Million Challenge and Restricted Giving. Thank you for your leadership and ongoing support of OUR Foundation. Please continue to share YOUR Rotary stories with your District's Rotarians. **Through your generosity, we are *Making Dreams Real* throughout the world.**

January 31, 2009 Contribution Totals

Annual Programs Fund	Worldwide	\$ 48,562,791	- 8.97% from 2007-2008
	Zone 27	\$ 1,540,825	- 13.49 % from 2007-2008 (YTD)
PolioPlus	Worldwide	\$ 12,257,938	+ 337.11%
	Zone 27	\$ 826,507	Since December 2007
Permanent Fund	Worldwide	\$ 5,573,188	- 35.11% (realized gifts only)
	Zone 27	\$ 1,080,506	Zone 27 leads the WORLD (realized gifts only)

Member Access Fact Sheet

What are the benefits of using Member Access?

Once registered, you will have access to a variety of on-line services specific to your affiliation with Rotary International and The Rotary Foundation. These services may include:

- Making contributions to The Rotary Foundation
- Viewing your TRF contributions and recognition history
- Registering for RI Meetings
- Searching the on-line RI Official Directory
- Managing your Rotary e-mail subscriptions
- Viewing secure sites

Is Member Access Secure?

Yes. Rotary takes your privacy seriously. When registered for the Member Access section of the RI Website, Rotary secures your information by using password protection and restricting access to authorized users. ***Please note: since July 1, 2007, all Rotarians must have their own Member Access passwords. It is no longer possible to use each other's passwords.***

How do I register?

Details on registering and answers to frequently asked questions can be found at www.rotary.org/en/selfservice/Pages/faq.aspx.

- **Note** - You will need a valid e-mail address to create an account. You will receive a verification e-mail with a hyperlink within 24 hours. You must click the verification link to complete the registration process. If you do not see the e-mail in your "Inbox", check your Spam/Bulk/Junk folder.

What kind of information does Member Access allow me to personally see?

ROTARIANS

Contribute to TRF
View your own personal contribution history
Manage e-mail subscriptions
Search Club and District data
Register for RI meetings
Search the RI Official Directory on-line

DISTRICT ROTARY FOUNDATION CHAIR & DISTRICT ANNUAL GIVING SUB-COMMITTEE CHAIR

All of the above +
View Share Contribution Detail Report (SCDR)
View Monthly Contribution Reports (MCR)
View PolioPlus District Challenge Reports
View Club Recognition Summaries (CRS)
View Every Rotarians Every Year (EREY) Reports
View Club Goals

DISTRICT GOVERNOR & DISTRICT GOVERNOR-ELECT

All of the above +
View Incoming Officers
View Daily Club Balance Report
Club Goal Entry

CLUB PRESIDENT & CLUB SECRETARIES

All of the above (except "Club Goal Entry")
Update Membership Data
Update Club Data
Pay Semi-Annual Dues and Print Semi-Annual Report
View Semi-Annual Report

Note: Club Treasurers will have access to some of the above information

ZONE 27 TRF TEAM (RRFC, Gifts Advisors, RFAC and Zone Challenge Coordinator)

Reports will be available to your Zone 27 TRF Team to allow them to provide service to their assigned Districts

More About the Future Vision Plan of The Rotary Foundation



“A FOUNDATION FOR THE FUTURE” The Rotary Foundation (TRF) Future Vision Plan Key Messages

Communication will be the key to the success of the Future Vision Plan. To ensure continuity through this period of growth and advancement of our Foundation, the key messages below must be delivered with one clear, positive voice.

Focus on Mission ■ Significant Impact ■ Sustainable Outcomes ■ Simplify Programs & Operations ■ Success in Promoting our Brand Image —A Premier Foundation

- **Look at what we've accomplished in polio!** Rotary has gained significant recognition and enhanced image because of its passion and leadership in polio eradication.
- The Future Vision is expected to further enhance Rotary's image due to future achievements, resources and capacity, credibility, and leadership in the world of philanthropy and peace.
- For many years, the Foundation has tried to be all things to all people, allocating resources across a wide spectrum of activities. By leveraging resources and being more focused, the Foundation can help Rotarians reach more people in need and make a greater, more enduring impact.
- The Foundation must remain relevant in the philanthropic world and focus on forwarding its mission and work.
- The Future Vision Plan offers the opportunity to develop the kind of high-impact projects, activities, and partnerships to help the Rotarians continue to have a global reach and provide sustainability for the beneficiaries it serves.
- We must remain attentive to the enormous changes and growing humanitarian needs in the world.
- The new grant structure offers clubs and districts more control and flexibility while also providing more focus.
- The new grant structure also allows clubs and districts to respond more quickly to urgent needs, both locally and globally.
- The plan will provide greater efficiencies and economies of scale in offering services.
- Today's economic downturn is a tremendous opportunity to focus on our core mission, continue to strengthen our programs, improve business processes, and move forward in reinventing our Foundation.
- The three-year pilot will provide the opportunity to evaluate the Future Vision Plan's strategies and assumptions to ensure the necessary corrections will be implemented before full rollout to the Rotary world.
- Rotarians will be able to do almost all the activities funded by the Foundation in the current program model.



THE ROTARY FOUNDATION FUTURE VISION PLAN

Quick Reference Guide

In 2008, The Rotary Foundation Trustees adopted the Future Vision Plan, a forward-looking, strategic approach to fulfilling the Foundation's mission that will continue its transformation and advancement. This guide provides basic information on the structure of the plan, the rationale behind it, and the expectations of what it will achieve.

The Need

- For many years, the Foundation has tried to be all things to all people, allocating resources across a wide spectrum of activities. By leveraging resources and focusing them on those areas where Rotarians can be most effective, the Foundation can enable Rotarians to make a greater, more enduring impact. The remarkable success of PolioPlus illustrates the value of this approach and provides a model for the future.
- Through its partnership with the Gates Foundation, the World Health Organization, UNICEF, and the U.S. Centers for Disease Control and Prevention, however, Rotary has gained stature in the world of international development. The Future Vision Plan offers the opportunity to further enhance Rotary's public image through focused, high-impact projects and humanitarian causes.
- The Rotary Foundation's programs have not changed significantly since they were established decades ago, despite enormous changes in the world. As more Rotarians began using Foundation programs, administrative costs increased; the cost of administering a small grant at times exceeded the amount of the grant itself.
- Rotarians have expressed frustration with the current system, calling for a more accessible Foundation, improved grant application process, and greater autonomy.

The Purpose

Based on input from various stakeholders including Rotary senior leaders and grassroots Rotarians, the Foundation Trustees developed the Future Vision Plan, which is designed to:

- Focus service efforts on the mission of the Foundation for greater impact and sustainability.
- Improve Rotary's credibility and leadership role in the world of philanthropy, service, and peace.
- Offer program options to help clubs and districts achieve both global and local goals.
- Increase the sense of ownership at the district and club levels by transferring more decisions to the Districts.
- Simplify Foundation programs and processes consistent with the mission.
- Enhance Rotary's public image through relevant, high-impact humanitarian projects and partnerships with prominent non-governmental organizations and corporations.

The Structure

The Future Vision Plan offers two types of grants: Rotary Foundation District Grants and Rotary Foundation Global Grants.

- **Rotary Foundation District Grants** are block grants made to districts for up to 50 percent of their District Designated Fund (DDF). Districts can use these grants to fund scholarships, support vocational training teams, sponsor volunteer service, provide disaster relief, and carry out community and international service projects. District grants allow Rotarians to respond quickly to urgent needs and to plan smaller projects in their communities and abroad that fit within the mission of The Rotary Foundation.
- **Rotary Foundation Global Grants**, which have a minimum World Fund award of US\$15,000 and maximum of \$200,000, support larger humanitarian projects with sustainable, high-impact outcomes; scholars; and vocational training teams in one of the following six areas of focus:
 - Peace and conflict resolution/prevention
 - Disease prevention/treatment
 - Water and sanitation
 - Maternal and child health
 - Education and basic literacy
 - Economic and community development

There are two types of global grants:

- ***Club and district-developed global grants***, which are partially funded by the sponsors and receive a match from the Foundation's World Fund.
- ***Packaged global grants***, which are developed by the Foundation in collaboration with Rotarians and strategic partners with expertise in the area of focus being addressed, are funded 100 percent by the World Fund and/or the identified strategic partner. Packaged global grants offer ready to implement projects and activities for clubs and districts to implement efficiently and effectively.

The Strategic Partners

- The Rotary Foundation will partner with select organizations and corporations that have demonstrated expertise in one or more of the areas of focus.
- The strategic partners will provide technical, financial, and/or advocacy resources for packaged global grants.

The Pilot

- Districts may apply to participate in the Future Vision pilot online through Member Access at www.rotary.org until May 15, 2009.
- Participating Districts must obtain the approval of 2/3 of their Clubs and complete a qualification that includes mandatory training during the 2009-2010 International Assembly for Governors and District Foundation Committee Chairs.
- About 100 Districts will be selected to participate as Pilot Districts. The Pilot Districts will form a representative group in terms of locations, size and level of involvement with The Foundation.
- The Future Vision pilot will begin on July 1, 2010 and run through June 30, 2013.
- Pilot Districts and non-pilot Districts may work together for any District Grant, though partnerships for Global Grants will only be available to Pilot Districts.
- The Foundation will use feedback from the Pilot Districts to refine the plans for its roll-out to all Districts in 2013-2014.

The Transition

- All Rotary districts, regardless of their participation in the Future Vision pilot, will be able to participate in PolioPlus and Rotary World Peace Fellows programs.
- Non-pilot districts will continue to operate under the current grant structure until July 2013.
- Some current Foundation programs will be phased out before 2013-2014 to free up resources needed for the transition to the new model. The 2010-2011 Rotary year will be the last year for which the Foundation will award Multi-year and Cultural Ambassadorial Scholarships; Rotary Grants for University Teachers; Health, Hunger & Humanity (3-H) Grants; Volunteer Service Grants; and Disaster Recovery Grants.
- Non-pilot District will receive training on the new grant structure in 2012-2013.

Expected outcomes

- Through the scope and sustainability of the global grant projects, the Foundation will enable Rotarians to reach a greater number of people and do more good in the world.
- Because of The Foundation's high-impact work in the six areas of focus, Rotary will gain greater prominence in the worlds of international development, education, peace, and public health and in local communities worldwide.
- This enhanced public image will lead to increase in membership and contributions to The Foundation.
- By 2020, The Foundation projects to have reduced programs operation expenses to realize a total net return of US \$6 million.

Reminders of This and That...

Rotary Video Magazine (RVM)

Volume 4; Issues 1 and 2 both contain wonderful stories about our Zone 27 Districts. Issue 1 includes a story on the Cedar Rapids, Iowa community and District 5970, following the horrendous flooding of 2008. Issue 2 features a story on the Rotary Club of Hartford, Wisconsin in District 6270, and their partnership with the local High School. This issue also includes a story featuring Rotary One, Chicago, Illinois in District 6450, and highlights their Jobs One summer internship program for High School Students. I hope you all subscribe to the RVM. If not, please consider an annual subscription and share the videos with your District and Club Rotarians. If you have a Club or District projects that could be a part of a future RVM magazine, please follow up with the editors. You may want to consider using the RVM as a program at a weekly Club meeting.

Great Opportunity to Promote TRF-Direct

To all DGE: Take advantage of your upcoming PETS and District Assembly to promote Rotarian involvement in the TRF-Direct program.

1. Make copies of the TRF-Direct form and hand it out to all your PE at the beginning of PETS and all Club officers and Club Members at District Assembly.
2. ASK all Rotarians to consider using TRF-Direct for their annual gifts to the Annual Programs Fund.
3. Minimum contribution for Checking/Savings account is \$10/month or \$25/quarter and the minimum contribution for Credit Cards is \$25/transaction.
4. Challenge all Rotarians with a MATCHING GIFT from the District.

The majority of gifts that are contributed via TRF-Direct exceed the \$100 level. Lead by example. All District leaders should consider using TRF-Direct for their gifts. If you are giving to the Annual Programs Fund via TRF-Direct, share the ease of the process. I personally feel really good about my support of TRF-at least once a month-when I balance my checkbook and see "The Rotary Foundation" on my bank statement.

TRF Recognition Points

Beginning July 1, 2009, The Rotary Foundation will only transfer recognition points in increments of 500 points or more...with one exception. **If the transfer is accompanied by a cash contribution, the point transfer amount can be in any amount.** For example, if your Club is currently matching member contributions of \$100, and the transfer is made with the member's gift of \$100, the transfer of 100 recognition points can be made.

Polio Eradication Speakers

Polio survivors are living in all of our Districts. Please create a speakers bureau that includes polio survivors. Who better to tell the story than those who have survived this dreaded disease? Members in our Districts have participated in **National Immunization Day events (NID)**. They have seen the ravages of the disease first hand. Include them in communications to your Clubs so they can invite them to speak at Club meetings and special events.

TRF-Direct

The Rotary Foundation has updated **TRF-Direct** to include gifts to the **Annual Programs Fund** and **PolioPlus**.

PolioPlus “POP-UP” Boxes

The PolioPlus **POP-UP Boxes** have been updated to serve as **banks for loose change**. They are available through the RI Warehouse as catalogue #989 and are available for \$3.00/each.

Remaining DDF

All District Governors and District Rotary Foundation Chairs will be receiving a letter from TRF regarding non-allocated DDF. Please **consider donating any excess DDF to (1) PolioPlus, (2) World Peace Fellows, and/or (3) Low-Income Country Scholarships**.

Paul Harris Fellow Certificates

Beginning July 1 2009, all first-time **Paul Harris Fellow Certificates** will include the **“End Polio Now” logo graphic**. The graphic will appear on the certificates regardless of the designation of the gift.

Correct Address for TRF Contributions

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**



As we are in the midst of the training cycle for our 2009-2010 Rotary year, I would offer the following quote that I hope you all take to heart and share...

**“Leadership is the ability
of a single individual,
through his or her actions,
to motivate others
to higher levels of achievement”**

-Buck Rodgers