



# 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  
April 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         | \$ 158,811          | 47.76%        | \$ 48.88        | \$ 49,205 30/66   | \$ 500              |
| D5650         | \$ 217,866         | \$ 197,976         | \$ 128,538          | 64.93%        | \$ 54.01        | \$ 30,941 29/45   | \$ 125              |
| D5950         | \$ 913,784         | \$ 724,825         | \$ 339,495          | 46.84%        | \$ 112.16       | \$ 21,405 28/61   | \$ 8,292            |
| D5960         | \$ 343,422         | \$ 318,324         | \$ 177,754          | 55.84%        | \$ 53.69        | \$ 123,689 61/64  | \$ 302,036          |
| D5970         | \$ 242,407         | \$ 226,639         | \$ 95,404           | 42.09%        | \$ 32.15        | \$ 57,528 36/56   | 0                   |
| D6000         | \$ 452,457         | \$ 427,077         | \$ 254,031          | 59.48%        | \$ 60.00        | \$ 68,059 43/62   | \$ 150,876          |
| D6220         | \$ 176,197         | \$ 112,915         | \$ 66,019           | 58.47%        | \$ 33.50        | \$ 40,639 23/41   | \$ 100              |
| D6250         | \$ 234,361         | \$ 273,350         | \$ 115,602          | 42.29%        | \$ 33.76        | \$ 80,594 39/61   | \$ 981,514          |
| D6270         | \$ 230,941         | \$ 293,160         | \$ 142,064          | 48.46%        | \$ 42.78        | \$ 227,663 51/60  | \$ 1,000            |
| D6420         | \$ 170,262         | \$ 157,175         | \$ 85,571           | 54.44%        | \$ 38.53        | \$ 42,768 32/49   | 0                   |
| D6440         | \$ 424,200         | \$ 352,730         | \$ 169,298          | 48.00%        | \$ 63.81        | \$ 196,253 52/72  | \$ 69,014           |
| D6450         | \$ 326,066         | \$ 242,005         | \$ 105,050          | 43.52%        | \$ 45.52        | \$ 45,615 32/65   | \$ 10,125           |
| <b>TOTALS</b> | <b>\$3,731,963</b> | <b>\$3,326,176</b> | <b>\$ 1,678,826</b> | <b>51.31%</b> | <b>\$ 51.81</b> | <b>\$ 935,154</b> thru 1-31-09<br>426 / 636 participation<br><b>Goal: \$1,908,000</b><br>(Based on \$3,000/Club<br>-December 2007-2010) | <b>\$ 1,532,082</b> |

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

**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 prepare for our new Zone alignment.
- b. 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 February 28, 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 February 28, 2009**

### Clubs Making Dreams Real Through Their Annual Giving Contributions

| District | Highest Giving Club/Capita     | Membership | Goal     | Thru 2-28-09 | Per Capita       | # < \$10.00/Capita/#Club/# Members |
|----------|--------------------------------|------------|----------|--------------|------------------|------------------------------------|
| D5580    | Central Lakes-Pequot Lakes, MN | 23         | \$15,000 | \$7,958      | \$ 346.00/capita | 24/66 Clubs / 3249 Members         |
| D5650    | Lincoln South, NE              | 43         | 8,500    | 6,614        | 153.81/capita    | 11/45 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   | 27,855       | 348.19/capita    | 26/64 Clubs / 3311 Members         |
| D5970    | Dubuque Key City, IA           | 11         | 0        | 2,780        | 252.73/capita    | 21/56 Clubs / 2967 Members         |
| D6000    | West Liberty, IA               | 33         | 7,632    | 8,600        | 260.61/capita    | 8/62 Clubs / 4234 Members          |
| D6220    | Waupaca Breakfast, WI          | 54         | 6,000    | 9,118        | 170.15/capita    | 21/41 Clubs / 1971 Members         |
| D6250    | Fitchburg-Verona, WI           | 12         | 650      | 1,400        | 116.67/capita    | 26/61 Clubs / 3424 Members         |
| D6270    | Two Rivers, WI                 | 31         | 3,500    | 4,274        | 137.87/capita    | 24/60 Clubs / 3321 Members         |
| D6420    | Quad Cities, IL                | 22         | 2,200    | 3,970        | 180.45/capita    | 18/49 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   | 8,465        | 282.17/capita    | 29/65 Clubs / 2308 Members         |

THE *visionaries* WHO BEGAN ROTARY HAD THE *foresight* – AND  
 THE *desire* – TO *imagine* A BETTER WORLD.  
 THE ROTARY FOUNDATION HELPS TURN THAT *dream* INTO A REALITY.



### **Rotary's \$200 Million Challenge – Can We Do It? & DDF Contributions**

YES we can! It might be helpful for all District TRF leaders to know what the Rotarians in Zone 27 accomplished in the last PolioPlus Eradication effort from 2002-2005. Time seems to have a way of getting away from us and a reminder of what we know we can accomplish may help motivate us to even greater things. Following are two lists. The first will show the total contributions of our Zone 27 Districts from 2002-2005. I hope you will agree that these totals provide us with good historical data that we can use in promoting our efforts between now and 2012. The second listing is from The Rotary Foundation with a special request for your consideration in donating 20% of your 2008-2009 District Designated Funds (DDF) to the End Polio Now effort. This listing also includes DDF Contributions made through February 13, 2009.

|               | <u>2002-2005 Polio Contributions</u> | <u>2008-2009 DDF Requests</u> | <u>DDF Contributions</u> |
|---------------|--------------------------------------|-------------------------------|--------------------------|
| District 5650 | \$ 202,408                           | \$ 20,013.11                  | \$ 8,000                 |
| District 5950 | \$ 934,803                           | \$ 59,159.24                  | \$ 0                     |
| District 5960 | \$ 564,037                           | \$ 34,157.97                  | \$ 50,000                |
| District 5970 | \$ 233,089                           | \$ 20,885.82                  | \$ 0                     |
| District 6000 | \$ 687,218                           | \$ 43,438.45                  | \$ 0                     |
| District 6220 | \$ 234,603                           | \$ 15,341.00                  | \$ 0                     |
| District 6250 | \$ 719,807                           | \$ 25,323.77                  | \$ 24,000                |
| District 6270 | \$ 393,424                           | \$ 24,734.85                  | \$ 0                     |
| District 6420 | \$ 728,381                           | \$ 19,366.66                  | \$ 0                     |
| District 6440 | \$ 999,703                           | \$ 43,448.92                  | \$ 0                     |
| District 6450 | \$ 683,166                           | \$ 27,687.40                  | \$ 0                     |
|               | <b>\$ 6,380,639</b>                  | <b>\$ 333,557.19</b>          | <b>\$ 82,000</b>         |

### **FUND DEVELOPMENT - How Can We Focus Our Efforts?**

When we promote and continue to promote our Annual Programs Fund (APF) and Rotary's \$200 Million Challenge, we need a plan of action. We cannot expect our Clubs to just do it. Let us assist them with a specific plan that will enable them to achieve their goals.

- ◆ Who are we?
- ◆ What is our purpose?
- ◆ What really matters to us?
- ◆ Where can we be most useful?
- ◆ Where are we going?
- ◆ What should we stop doing?
- ◆ What should we start doing?
- ◆ Where should we be focusing our time, energy, money, talents, and passions?

### **Weekly Rotary Foundation Thoughts:**

|        |  |
|--------|--|
| Week 1 | History of The Rotary Foundation   |
| Week 2 | Group Study Exchange   |
| Week 3 | 50% of our gifts comes back to District through District Designated Fund |
| Week 4 | World Peace Centers  |
| Week 5 | Permanent Fund   |

## Weekly Rotary Foundation Thoughts (continued)

|             |  |
|-------------|--|
| Week 6      | PolioPlus  |
| Week 7      | Matching Grants (incorporate Club or District specific Grants)   |
| Week 8      | Annual Programs Fund   |
| Week 9      | District Simplified Grants (incorporate specific Club DSG Grants)  |
| Week 10     | Ambassadorial Scholars   |
| Week 11     | Literacy Projects through The Rotary Foundation  |
| Week 12     | How to become a Bequest Society Member to the Permanent Fund   |
| Week 13     | What can \$100 do? <ul style="list-style-type: none"><li>-Textbooks for one elementary school in Zambia</li><li>-Hearing aids for children in Pakistan</li><li>-De-worming tablets for over 100 children in the Philippines</li><li>-Three cataract surgeries in India</li></ul> |
| Week 14     | Promoting Every Rotarian Every Year  |
| Week 15     | <i>SHARE</i> System  |
| Week 16     | Becoming a Paul Harris Fellow  |
| Week 17     | Putting “Fun” in fundraising   |
| Weeks 18-52 | Go to <a href="http://www.rotary.org">www.rotary.org</a> and type Weekly Rotary Foundation Thoughts in “search” window   |

## **Year to Date Update from the General Secretary as of April 2, 2009**

“Since my letter on this subject on February 12, the global economy has worsened, and the financial markets continue to lose significant value. As of February 28, both RI’s and The Rotary Foundation’s investments had further declined in value in line with the markets, with investment losses of approximately \$25 million and \$222 million, respectively. Although the markets reacted more favorably during the last two weeks in March, they remain extremely volatile.

“The current investment climate will continue to present challenges for all service and charitable organizations in the foreseeable future. It is difficult to predict the near and long-term impact that the US Federal Reserve and Treasury policies will have on the financial markets.

“On a positive note, however, Rotary’s cash flows remain strong, and we have not had to sell any investments to operate. RI’s revenues from dues and other services and activities remain ahead of budget and prior year. Rotarian contributions to The Foundation are up \$6 million over last year. We have cut all non-essential and discretionary spending for the balance of this fiscal year, and I am taking every action possible to reduce costs next fiscal year, with minimum impact on services to you and your Clubs.

“The significant decline in the market value of our Foundation’s investments has diminished The Foundation’s operating reserve, requiring the Trustees to take specific steps needed to continue programs and operations during this economic crisis. At their January meeting, the Trustees reduced the current fiscal year’s World Fund program awards budget by \$16.3 million. Looking ahead, the Trustees will consider additional actions for fiscal 2009-2010 and beyond to fund existing program commitments and to pursue The Foundation’s strategic goals within the current financial constraints. In this regard, I would like to address several questions that Rotarians have raised about The Foundation’s operations.”

**Q** Was Rotary’s \$200 Million Challenge initiated to cover investment losses in the PolioPlus Fund?

**A** The answer is absolutely not. As we have consistently reported to you since the financial crisis began last year, the PolioPlus Fund is safely invested-principally in short-term US Treasury securities-and continues to earn money for program purposes.

**Q** Given the cutbacks in World Fund awards, will Districts be allowed to roll forward their unspent DDF from 2008-2009 into the next fiscal year?

**A** The answer is yes. Although the current situation requires the Trustees to limit World Fund spending, the DDF assets are secure and available for spending as usual.

**Q** Will the Future Vision Plan Pilot be delayed due to the current financial situation?

**A** While many actions are being considered for next year and beyond, the Future Vision Plan represents a more efficient and cost-effective method of operation for our Foundation; the Pilot is a strategic priority and is expected to proceed as planned.

“I hope you find the information I have presented here helpful. In writing letters such as this, I want to be transparent and provide an accurate picture of Rotary’s financial conditions without overwhelming or confusing our members. Unfortunately, the volatility of today’s markets means that the picture is constantly changing. What remains constant is the vigilant response to the situation by our volunteer senior leadership, and our professional staff.

“The RI Board, The Foundation Trustees, and other leaders who are guiding Rotary through this economic turmoil are working to protect Rotary’s assets as much as possible without compromising the organization’s strategic goals. **In addition to our fiscal responsibility, we are all keenly aware of the increasingly urgent need for Rotary’s service and humanitarian aid. In such a time of crisis, Rotary has much to offer our troubled world, and we must remain strong and able to meet these growing needs. As essential as financial resources are to fulfilling our mission, it is our human resources, our 1.2 million members, who will ensure Rotary’s continued commitment to serving its 33,000 communities worldwide.**”

## **Humanitarian Grants Information as of February 13, 2009**

As a follow-up to communication all Districts received regarding the status of Humanitarian Grants:

- ◆ At their January 2009 meeting, **The Rotary Foundation Trustees reduced the Humanitarian Grants budget by \$16.3 million for the 2008-2009 Rotary year**, in an effort to minimize the impact of unrealized losses to Foundation assets.
- ◆ The processing of **Matching Grant applications** were continued on a first-come first-serve basis until the remaining budget was committed. Once the budget is committed for 2008-2009, applications will be processed as follows:
  - Any applications that have been received by TRF and are currently pending will be kept on file, and subsequently reviewed after the start of the new Rotary year. These applications will be approved on a first-come first-serve basis when all requirements are complete. An e-mail communication will be sent to the sponsors of pending applications providing them with these details.
  - Any new applications that arrive after the budget has been fully committed will be returned to the sponsors, and they will be asked to re-submit the application, after July 1, 2009, for consideration beginning August 1, 2009.
  - Any grants that have already been approved this Rotary year will not be affected and will be processed for payment.
- ◆ At this time, the budget for **Volunteer Service Grants** has been fully committed for the 2008-2009 Rotary year and **no further applications will be accepted**. In light of this development, please note the following as we move forward:
  - The sponsors of pending VSG will be notified that their applications cannot be considered for funding in the 2008-2009 Rotary year.
  - Any new VSG applications received by TRF will be returned to the sponsors with an explanation.
  - Any Volunteer Service Grants that are already approved will not be affected and will be processed for payment.
- ◆ Information about **Humanitarian Grants for the 2009-2010 Rotary year** will not be available until after the April 2009 Trustees meeting. Any decisions taken at that meeting will be communicated to Rotarians well in advance of the start of the 2009-2010 Rotary year.
- ◆ Sponsors of applications that do not receive a grant in the current Rotary year are encouraged to fund their humanitarian efforts via other sources if possible. The RI website will be updated regularly as soon as new information is available. In addition, a **frequently asked questions** is available for download at [www.rotary.org](http://www.rotary.org). Should you have further questions about Humanitarian Grant processing in 2008-2009, please contact TRF at [grants@rotary.org](mailto:grants@rotary.org) or contact the grant coordinator for your application. For further information on the financial statements of The Rotary Foundation visit [www.rotary.org](http://www.rotary.org).
- ◆ **District Simplified Grants** are fully funded by the District Designated Fund (DDF) so there will be no impact to the approval or payment process for DSG.
- ◆ The next **World Reporting Analysis** will be concluded in March 2009 for consideration at the April 2009 Trustee meeting. According to the Trustee guidelines, a District below 70% compliance on grant reporting after two semi-annual analyses will be suspended from participating in Humanitarian Grants. In order to ensure that your District is above 70%, please review all of your District's open grants. If your District is below 70%, work with Clubs in your District to ensure they are meeting their grant reporting requirements. If your District's reporting was below 70% in October 2008, it is critical that your District increase its reporting percentage before the next World Reporting Analysis to avoid a possible suspension from Humanitarian Grants.

## **What's Rotary?**

Rotary is a volunteer organization of 1.2 million business and professional leaders united worldwide to provide humanitarian service and help build goodwill and peace. About 33,000 Rotary Clubs in more than 200 countries and geographic areas conduct projects to address today's challenges-including illiteracy, disease, hunger, poverty, lack of clean water, and environmental concerns-while encouraging high ethical standards in all vocations.

As the world's largest private provider of international scholarships, The Rotary Foundation of Rotary International helps more than 1,000 students annually to study abroad and serve as cultural ambassadors. Rotary also partners with six prestigious universities around the world, providing opportunities to earn a master's degree in peace and conflict resolution.

PolioPlus is our flagship program. By the time polio is eradicated, Rotary Club members will have contributed \$850 Million and countless volunteer hours to immunize more than two billion children in 122 countries. Rotary is a spearheading partner in the Global Polio Eradication Initiative, along with the World Health Organization, UNICEF, and the US Centers for Disease Control and Prevention.

Founded in Chicago in 1905 as the world's first volunteer service organization, Rotary quickly expanded around the globe. Today, Club members meet weekly to plan service projects, discuss community and international issues, and enjoy fellowship. Clubs are non-political and open to every race, culture and creed.



## **and Why Should We Remind Ourselves Regularly?**

“What’s Rotary?” offers us several opportunities for membership development and retention, Rotary Foundation fund development and program enhancement and public relations. When we share our Rotary experiences with prospective members and new members of our Clubs, we help them better understand why we became Rotarians and why we are still a Rotarian. Don’t hesitate tell others about Rotary and why it is an important part of your life.

### **Becoming an Effective Leader**

- Assume the Role
- Act the Role
- Create the Vision
- Perform-Challenge your District and Clubs
- Lead by Example

### **Four Pillars of an Effective Club**

- |                   |   |
|-------------------|---|
| <b>Management</b> | Making your Rotary Dream a Reality<br>Leadership based on shared vision, follow-through and accountability  |
| <b>Membership</b> | Renew – Replace – Retain – Reward   |
| <b>Motivation</b> | Service – Program – Fellowship<br>Offering “Pride of Membership”  |
| <b>Money</b>      | Put a <b>FACE</b> on all fund raising activities <ul style="list-style-type: none"> <li>◆ Tell them when you raise it</li> <li>◆ Tell them when you budget it</li> <li>◆ Tell them when you spend it</li> <li>◆ Show everyone the <b>RESULTS</b></li> </ul> |

### **The Rotary Leader’s Year**

- |  |   |
|--|---|
| <b>Prepare (Panic)</b>                 | Now through July 1                      |
| <b>Launch</b>                          | July-September                          |
| <b>Realize</b>                         | September -February                     |
| <b>Enjoy, Replace &amp; Transition</b> | March-June                              |
| <b>The Ultimate Test of Leadership</b> | Do your job so well they don’t miss you |

### **18 Winning Ideas for Achieving Every Rotarian Every Year**

1. **Create or revamp your Club Rotary Foundation Committee, including a training session. The Committee should be the first to make their annual gifts.**
2. Have a respected member of your Club write a letter asking every Rotarian in the Club to make their annual gift.
3. Use available Paul Harris recognition points as a “match” incentive to raise new money.
4. Get your Club involved in international or local community service projects utilizing DDF.
5. Have a Rotary Foundation Dinner or event inviting all members AND their spouses.
6. Invite a charismatic speaker to share a Rotary Foundation program experience.
7. Share specific success stories that put a face on OUR Rotary Foundation.
8. Encourage friendly competition between teams meeting/exceeding goals.
9. Break giving into specific tangible items (\$100 = 3 cataract surgeries in India)
10. Educate NEW Members.
11. Encourage automatic deductions through TRF-Direct.
12. Encourage credit card gifts.
13. Ask for gifts in appreciate stock (this may be problematic at this time...)
14. Make a DVD with local flavor to be shown to the Club and on the community cable channel.
15. Have an art auction (or other fundraising event) with proceeds to go to The Rotary Foundation.
16. Add contributions to member’s quarterly dues invoices.
17. Encourage Rotarians to join the Bequest Society of the Permanent Fund.
18. **ASK EVERY MEMBER to support OUR Rotary Foundation EVERY YEAR.**

**“It isn’t enough to talk about peace. One must believe in it.  
And it isn’t enough to believe in it. One must work at it.”**

-Eleanor Roosevelt