



# Foundation News



January 08

Leigh Higinbotham, Regional Rotary Foundation Coordinator, Zone 22 West— Districts 5010, 5020, 5040, 5050, 5060, 5080, 5360, 5370, 5550  
Richard Clarke, Regional Rotary Foundation Coordinator, Zone 22 East— Districts 6330, 7010, 7040, 7070, 7080, 7790, 7810, 7820

## FOUNDATION WITH A FUTURE—TRUSTEE CAROLYN JONES

Remember the Tom Cruise movie “A Few Good Men”? Well the Rotary Foundation is looking for a few good districts – 60 of them to be precise. These 60 Rotary districts from all around the world will be the trail blazers when we take the Foundation’s Future Vision Plan out for a test drive. Does your district want to take the wheel and be one of the leaders in developing the final plans for the Foundation’s future, or will your district be more comfortable sitting back in comfort for 4 more years while other Rotarians take the lead and the risks. It is up to you. There is no right or wrong answer. Here’s the story.

In October 2007, the Trustees approved the general parameters for how the Rotary Foundation will operate in the Foundation’s next century of service. The RI Board of Directors subsequently endorsed the Plan. There are still many fine details that have to be decided and all the blanks filled in. The Future Visions Committee is working on the details now and will present its report to TRF at the Trustees’ April board meeting. If all goes well, the Trustees will finalize the Plan in April and seek the Board’s endorsement at the Board’s 2008 June meeting.

This is where you come in. In Rotary Year 2008-2009, TRF will be looking for 60 Rotary districts willing to pursue their humanitarian and educational programs under the new Future Visions Plan. Every district will receive information about the Future Vision Plan and the qualifications for participating districts. Interested districts will be trained and certified. The first grants under the Plan will be awarded in 2009-2010 and the pilot program will go forward through 2011-2012. All during the 3-year pilot period, the staff will be supporting, monitoring and evaluating the districts’ activities, successes and challenges related to operating under the Plan. [During the test pilot period, the nonparticipating districts will continue to pursue their humanitarian and educational activities under the existing programs.] The Trustees will fine tune the Plan, and in RY 2012-2013, all districts will be certified to operate under the new Plan. Existing programs will begin being phased out.

“Why would you want to be a pilot district? It means a committed district Foundation committee that is willing to learn something new and then to communicate this information to the clubs. For the duration of the pilot period, the Foundation committee will be responsible for exercising good stewardship over all the clubs engaged in this new adventure. The district leadership may have to endure complaints from clubs, Rotarians and past leadership about their unhappiness with being involved in the pilot program. Why would you want to be a pilot district?”

Well, on the flip side, your district would be one of 60 districts making history. Your involvement in the pilot program would help write the final lines to the Future Vision Plan. Your experiences would provide the information needed to accept the Plan as is or to fine tune it where needed. Your district would have access to new financial resources available under the Plan. You would be amongst the first of 530+ Rotary districts that, sooner or later, will have to participate in the Future Plan. Once the Plan goes into full effect in 2012-2013, your district would already be well along the learning curve while another 470+ districts would just be getting started. The Rotary Foundation needs your help. You would be one of the pioneers.

Think about it.

# DISTRICT 7820'S 1ST PEACE AND CONFLICT SCHOLAR

— CHERYL HEBERT



I had the good fortune of spending my summer with 19 leaders from around the world who share the same desire - seeking peaceful solutions to our problems whether they be individual, community or global.

The Rotary Centre for Peace and Conflict Studies at Chulalongkorn University in Bangkok, Thailand was established in July 2006 to help mid to upper level professionals become better equipped to prevent and resolve conflict and promote world understanding and peace.

This 2.5 month course offered many rich learning opportunities. Along with experiencing the Thai culture was the opportunity to get to know a diverse group of people from countries in Asia, Europe, Africa, and other parts of North America. From these classmates I learned more about the conflicts in the countries where they live and work such as Zimbabwe, Cambodia, Sri Lanka, and Afghanistan and of the incredible strengths of their countries' people.

Our many instructors, throughout the course, shared their wealth of knowledge and practical experience on such topics as conflict analysis and mediation; strategies for peace including the role of the military, the United Nations and civil society; and the challenges of post war reconstruction, reconciliation and truth commissions.

The field trips were the highlight for me. In Northern Thailand I learned about the impact of the civil war in Burma (Myanmar) and the plight of the indigenous peoples forced to flee the country. We also visited Mae La refugee camp in Mae Sot, one of the largest refugee camps with 40,000 people. We met many leaders in the region who inspired me with their courage including staff of the Mae Tao Medical Clinic who risk their lives to deliver medical services to people in the jungles of Burma.

While in Cambodia I was exposed to the impact of genocide and the complexities of post war reconstruction. I was inspired by the perseverance of the people from local and UN agencies working to re-build civil society through education, human rights, legal reform, and arms reduction.

And now, I continue to connect with my former classmates as we exchange information about current projects and ideas for future initiatives. I have been given a new perspective on the importance of human rights which I bring to my work at the Nova Scotia Human Rights Commission.

Thank you Rotarians for supporting this very important program.

## **HUMANITARIAN GRANTS CADRE OF TECHNICAL ADVISORS: OVER 250 VOLUNTEERS ENROLLED—PDG PAUL BEAULIEU**

For more than a decade the Humanitarian Grants Cadre Program has existed to ensure proper stewardship of the Foundation grants awards and to assist Trustees in the grant decision-making process by providing technical expertise when evaluating grants requests.

The Cadre provides assistance not only to the Foundation but also to Rotarians who are planning and implementing projects, thus helping to ensure their success and at the same time increasing the effectiveness of TRF funds. The Humanitarian Grants Cadre is an expanded version of the Health, Hunger and Humanity (3-H) Cadre of technical Advisors whose original function was to support the 3-H Program by providing technical guidance to help groups of Rotarians plan large-scale projects. In its new role, the Humanitarian Grants Cadre provides technical evaluations and helps to ensure that stewardship guidelines are complied with for all humanitarian projects supported by TRF.

The Humanitarian Grants Cadre of Technical Advisors represents a team of Rotarians who have volunteered to serve as experts in their professional field to review, monitor and evaluate Humanitarian Grants projects. Although almost unknown to other Rotarians, over 250 Rotarians are enrolled as Cadre Technical Advisors.

Each Technical Advisor is assigned to one or more of the following seven Cadre teams, based on individual expertise with respect to formal training/education and/or professional experience:

- Agriculture and Food Production - Education and Literacy - Financial Auditors
- - Health - Low Cost Shelters (Existing projects only)
- Small Business and Revolving Loans - Water, Sanitation and Environment

Each of those seven teams is headed by a group of three Technical Coordinators under the responsibility of the Cadre Chair appointed by the Trustees.

Role & Responsibilities:

There are three types of Cadre assignments:

Technical Reviewers are asked to provide written evaluation of a proposed project.

Monitors are asked to undertake a technical evaluation of a proposed project in the application stage (advance Monitor); a project in progress (Interim Report); or a completed project (Post Project Monitor) for 3-H or Matching Grants. A Monitor visits the project site(s) to physically inspect the project. Sites visits last two or three days.

Auditors are asked to conduct a financial audit of a 3-H or Matching Grant project when it is in progress or after it has ended. Like Monitors, an Auditor visit the project site(s) to physically verify any assets or other item provided, review the financial records and related documentation.

Language skills are important for a Technical Advisor. Proficiency in two or more languages facilitates the communication with the project committees. A Technical Advisor should be able to accept assignments on short notice, as often project information is required in time for the next Trustees' meeting.

Rotarians interested in becoming a Technical Advisor will find the application information on the R.I. website.

## TRF DONATIONS UPDATE

For the five months ending 30 November 2007, contributions to The Rotary Foundation totaled US\$140,459,233, up 273.70% overall due to the significant PolioPlus contribution made by the Bill and Melinda Gates Foundation for US\$100,000,000, challenging The Rotary Foundation to match this gift with an additional US\$100 million in contributions to PolioPlus over the next three years. Annual Programs Fund contributions remain solid with a modest growth of 6.67% to US\$28,580,642 over last year. Contributions to the Permanent Fund declined -19.45% totaling US\$4,033,158. But even without the Gates Foundation Contributions—donations are running ahead of last year by just slightly less than \$3M or approximately 8% ahead of last year.

	<u>November 2007</u>	<u>November 2006</u>	<u>Increase (Decrease)</u>
Annual Programs Fund	US\$ 28,580,642	US\$26,792,855	6.67%
Permanent Fund	US\$ 4,033,158	US\$ 5,007,090	(19.45)%
<u>Restricted Giving</u>	<u>US\$107,845,433</u>	<u>US\$ 5,786,402</u>	<u>1,763.77%</u>
<b>TOTALS</b>	<b>US\$140,459,233</b>	<b>US\$37,586,349</b>	<b>273.70%</b>

## ZONE 22 IN TOP 5

### Top Five Zones

For the Five Months Ended 30 November 2007

ZONE	TOTAL	ZONE	ANNUAL PROGRAMS FUND
9 - Korea	3,995,171	9 - Korea	3,511,441
23 - U S A - CA, ID, NV, OR, WA	2,710,219	24 - U S A - CA, HI, NV	1,882,930
24 - U S A - CA, HI, NV	2,386,608	23 - U S A - CA, ID, NV, OR, WA	1,456,429
22 - Canada and U S A, AK	1,980,395	2 - N. Central Japan and Micronesia	1,310,006
2 - N. Central Japan and Micronesia	1,722,360	22 - Canada and U S A, AK	1,260,951

  

ZONE	PERMANENT FUND	ZONE	RESTRICTED
23 - U S A - CA, ID, NV, OR, WA	660,786	22 - Canada and U S A, AK	600,582
2 - N. Central Japan and Micronesia	370,756	14 - Austria, Germany, Israel, Others	594,827
9 - Korea	366,850	23 - U S A - CA, ID, NV, OR, WA	573,005
25 - U S A - AZ, CA, CO, IA, ID, KS, Others	250,853	24 - U S A - CA, HI, NV	516,670
3 - South Central Japan	222,572	13 - Belgium, Lux, Liech, Neth, Switz	432,526

A big vote of thanks to Rotarians from across Zone 22—your generosity, hard work and dedication to Our Rotary Foundation has us continuing to be a leader in contributions to the Foundation.

Let's keep it up for the second half of the Rotary year in support of our 4 Zone leaders—President Wilf, Trustee Chair Bob, Director Monty and Trustee Carolyn! Lets make this a year to remember!

## THE IMPORTANCE OF ALMUNI

The first-ever Rotary Alumni Celebration will take place in conjunction with the upcoming 2008 RI Convention in Los Angeles, CA, USA, 13-14 June. This is a special pre-convention event tailored to TRF alumni and interested Rotarians and includes workshops, networking opportunities, featured speakers, and a reception. Information has been sent to all district governors and alumni and can be found on the RRFC forum under Alumni News. Districts are encouraged to sponsor at least one Alumnus to attend this inaugural alumni event.

## ZONE 22 EAST—AMBASSADORIAL/GSE ORIENTATION



On the weekend of Dec 7th and 8th—seven districts in the Eastern end of Zone 22 held their first multi-district orientation session for out-going GSE and Ambassadorial scholars.

This inaugural event was organized by PDG Roger Hayward, the Rotary Foundation Alumni Coordinator with the assistance of PDG Joan Hayward. They were assisted by trainers 7070 DRFC PDG Mike Cooksey and RRFC Richard Clarke.

The keynote speaker for the opening session was a returned GSE team member and now a new Rotarian, Ms Lynn

Malandrino of the Whitby Sunrise club. Who spoke about her experience and her decision to become a Rotarian.

The orientation session included background briefings on Rotary International, the Rotary Foundation, an insight into dealing with sexual harassment, how to prepare presentations, responsibilities of the scholars and Exchange team members and how to build their relationship with Rotary at home and abroad. The participants had an opportunity to ask any and all questions about the experience they could expect and what is expected before, during and after their Foundation funded opportunity.

The scholars and GSE team participants had an opportunity to share their planning to date and had separate break out sessions and for the GSE teams, times for the individual teams to do some planning for their specific trip.

All of the participants appreciated the opportunity to come together, meet others who are about to undertake a similar experience and to learn more about Rotary.

The benefits of the session were very evident and the program will be repeated next Rotary year.

## POLIOPLUS IN AFGHANISTAN



In the mountainous region of Kamadaca a few kilometres from the border, WHO Afghanistan polio supervisors consult with vaccination team leaders on the phone to monitor how the campaign is progressing. More than 70 teams are working in this area alone.

A child from a nomadic family receives polio vaccine in a settlement in Kabul. Nomadic communities are at high risk for polio. They regularly move both within the country and across the border, and often live in areas that lack access to clean water and sanitation. Vaccination teams formed within the community help increase vaccination coverage among nomadic people.



## POLIO-UPDATE

We are clearly making progress. The four endemic countries count for most of the new cases of polio last year, They are considerably fewer than this time this year and are restricted to pockets within those countries.

Total cases	Year-to-date 2007	Year-to-date 2006	Total in 2006
Globally	992	1902	1997
- in endemic countries:	897	1783	1869
- in non-endemic countries:	95	119	128

2007 is the year with the lowest-ever recorded incidence of WPV1 polio, with 293 cases reported, compared to 1,616 for the same period in 2006

More than 50% of the new cases have occurred in India, with Nigeria's new cases down by 80% from 2006. There has been a bit of bounce in Sudan and in the Democratic Congo Republic—both difficult to immunize in these days.

## CANADIAN CHARITABLE GIVING REACHES ALL TIME HIGH

According to a recently released Stats Canada tax return study individual charitable giving in calendar year 2006 reached \$8.5 billion. This was an 8.3 percent increase over the previous year. The national median gift increased for the 10<sup>th</sup> year in a row to \$250.00.

This positive trend masks another. The number of donors shrunk slightly by 1.4 % to 5.8 million.

Also just released is the third in a series of studies undertaken by the Edmonton based Muttart Foundation. In survey worked conducted for them by IPSOS-REID. Their study shows that Canadian Charities and those who lead them have the trust of Canadians. Only two professional groups have higher levels of trust, Nurses and Medical Doctors.

While the trust level is high, the study does indicate that Canadians have concerns about how charities raise funds and the degree that they inform donors of how the funds are use.

For instant 98% of Canadians consider it important that charities provide information about how donations are used, while 96% agree that charities should share information on fund raising costs. However, when asked how charities are doing at sharing information: only 51% think charities do a good job about providing information about the programs and services they provide; only 31% agreed that charities provide a good job of how they use donations; and even fewer 27% agree that charities provide sufficient information on fund-raising costs.

That is something we should all think about. How well are Rotary Clubs doing at informing our donors about how we are spending the funds we raise publicly. We have a good story to tell, but are we telling it?

Many Canadians (60%) agree that charitable organizations should be able to use some funds raised to offset fund-raising costs. However 2/3rds of survey respondents think that using commission based fund-raisers is wrong. A total of 87 % say that more attention should be paid to the amount charities spend on hiring professional fund-raisers. Again Rotary has a good story to tell our financial supporters – but are we telling it?

One last interesting finding from the Muttart study is that some 58% of Canadians indicate that they check out a charity via its website before giving. Another reason for Rotary Clubs to keep their websites up to date and informative of what they do.

## ROTARY CONTACT CENTRE

Need to contact The Rotary Foundation? A team of Foundation specialists in the new Contact Center is there to help. Specialists answer calls Monday through Friday from 8 a.m. to 5 p.m. CST.

**Phone:** 866-9RO-TARY or 866-976-8279 (U.S. and Canada only)

**E-mail:** [contact.center@rotary.org](mailto:contact.center@rotary.org)

For a list of other Foundation staff who are at your service, visit the [Contact Us page](#)

## AMBASSADORIAL SCHOLAR CREDITS

If a 2006-07 Ambassadorial Scholar expended less than the award amount, the district will receive the difference in the form of a "lower-cost scholarship credit" in their current DDF account. DRFC chairs in the districts that are receiving these credits for last Rotary year should have received an email notification late in the fall.

Scholars studying currently in 2007-08 are the last ones for which lower cost DDF credits will be available. Effective with 2008-09, the Trustees reduced the DDF option amount for scholarships and changed them to flat grant awards.

## PHILANTHROPY 400

The US Chronicle of Philanthropy recently published its report on the 400 largest by annual contributions, US-based Foundations. Overall donations were up by 4.3 %. However a significant proportion of the increase was due to funds raised in response to Hurricane Katrina.

The top 3 recipients of donations in the USA in 2006 were the United Way of America , the American red Cross and the Salvation Army. Our Rotary Foundation was 167th.

## ADDRESSES FOR USA AND CANADIAN CONTRIBUTIONS

We gratefully request that all District Governors put a special notice in their District Newsletters reminding Rotarians of the change of lockbox addresses for sending in contributions to the Foundation. In the United States, all contributions should be sent to:

The Rotary Foundation  
to:  
14280 Collections Center Drive  
Chicago, IL 60693

In Canada, all contributions should be sent

The Rotary Foundation Canada  
Lockbox B9322  
P.O. Box 9100 Postal Station F  
Toronto, ON M4Y 3A5

All Fund Development contribution forms are updated and available for download from the RI website. Please encourage clubs to use them.

## CREDIT CARD DONATIONS

Canadians love their credit cards and Rotarians are no exception. During the last two months of calendar year 2007, more than \$100,000 was contributed to the Rotary Foundation Canada via on-line credit card donations.

That is more than was contributed on-line in the entirety of 2006. Needless to say, TRF Canada is busy processing all the tax receipts.



As Rotarians we have the good fortune to have partnered in the past and now into the Future with The Bill and Melinda Gates Foundation. Like the Rotary Foundation, it is very much a value and principle based Foundation.

There are two simple values that lie at the core of the Foundation's work:

- All lives—no matter where they are being led—have equal value.
- To whom much is given, much is expected

The 15 principles below reflect the Gates family's beliefs about the role of philanthropy and the impact they want their foundation to have. The principles guide what they do, why they do it, and how they do it. These beliefs are shared by Warren Buffet which is why he has pledged billions of dollars to the Gates Foundation.

- This is a family foundation driven by the interests and passions of the Gates family.
- Philanthropy plays an important but limited role.
- Science and technology have great potential to improve lives around the world.
- The Gates Foundation are funders and shapers—they rely on others to act and implement.
- Their focus is clear—and limited—and prioritizes some of the most neglected issues.
- They identify a specific point of intervention and apply their efforts against a theory of change.
- They take risks, make big bets, and move with urgency. They are in it for the long haul.
- They advocate—vigorously but responsibly—in their areas of focus.
- They know they must be humble and mindful in their actions and words. They seek and heed the counsel of outside voices.
- They treat their grantees as valued partners, and they treat the ultimate beneficiaries of their work with respect.
- Delivering results with the resources they have been given is of the utmost importance—and they seek and share information about those results.
- They demand ethical behaviour of ourselves.
- They treat each other as valued colleagues.
- Meeting their mission—to increase opportunity and equity for those most in need—requires great stewardship of the money they have available.

## ROTARY FOUNDATION ALUMNI COORDINATORS

### Zone 22—West PDG Judy Harcourt

**The western end of Zone has the good fortunate of having PDG Judy Harcourt to assist with all matters concerning Rotary Foundation Alumni.**



Judy is a Past District Governor of Rotary District 5370 (2003 – 2004). She belongs to the Edmonton Riverview Rotary club, and was President of that club in 1998 – 1999. She has been a Rotarian for 17 years.

She serves on the District Rotary Foundation Committee as Alumni Sub-Committee Chairperson. She also serves on several other District Committees, and is the District Trainer for her District. Judy is also involved at the Zone level, as Rotary Foundation Alumni Coordinator for Zone 22 West and Zone 23 North.

District 5370 has been chosen to host the Zone Institute in Edmonton in September 2009, and Judy is Co-Chair of the host committee.

Judy is a multiple Paul Harris Fellow and a Benefactor for the Rotary Foundation.

### Zone 22—East PDG ROGER HAYWARD

**The eastern end of the Zone is equally fortunate to have PDG Roger Hayward assist with alumni matters.**

Roger was Governor of District 7070 in 1995/96 and is a member of the Alliston Club in Ontario

At the District level he has been heavily involved in Rotary Foundation, serving two three-year terms in which the 7070 Annual Foundation Challenge Walk was developed, producing, since 1995, over \$100,000 Canadian.

At the Zone and International levels he has been Chair of the Finding Committee, a member of the Selection Committee for Director, a delegate to the Youth Exchange Official Planning Meeting, a member of the World Community Service Task Force, a Zone Literacy Resource Group Coordinator, a Regional Rotary Foundation Coordinator, and is now the Zone 22 East Rotary Foundation Alumni Coordinator and the North American Region Literacy Resource Group Coordinator.

Since retirement, Roger has resumed working as a volunteer in the third world. Earlier in his life he worked for a year in Guyana as a volunteer and is now working with District 7070 as a member of sweat equity teams in Tanzania.

Roger's wife, Joan, is also a Rotarian and a Past District Governor of District 7070 (2005/06). Their son Stephen is a graduate student and attends Rotary meetings and events when on holiday from university. He is a PhD candidate in Chemical Engineering at the University of Toronto.

