



# Foundation News

## ZONE 22

Richard Clarke, Regional Rotary Foundation Coordinator, Zone 22 East— Districts 6330, 7010, 7040, 7070, 7080, 7790, 7810, 7820

Leigh Higinbotham, Regional Rotary Foundation Coordinator, Zone 22 West— Districts 5010, 5020, 5040, 5050, 5060, 5080, 5360, 5370, 5550

### A MESSAGE FROM THE TRUSTEE CHAIR

November 2007

Dear family of Rotary,

In 2004, The Rotary Foundation embarked on a new venture to boost its ability to do good in the world. The goal was to encourage every Rotarian to support Foundation programs by giving at least US\$100 to the Annual Programs Fund every year.

We've come a long way since the Every Rotarian, Every Year (EREY) effort began. Contributions to the Annual Programs Fund have nearly doubled – from \$55.8 million in 2002-03 to a record \$102.5 million in 2006-07.

But reaching the 2007-08 Annual Programs Fund goal of \$120 million is not merely about every Rotarian donating \$100. It's about each of us generously giving to the best of our ability. For some Rotarians, that amount might be \$100, for others \$1,000, for still others \$10,000.

By raising the bar for support of our Foundation, we can guarantee that its educational and humanitarian programs will be available to more people than ever before. More students will become Ambassadorial Scholars, and many more young professionals will take part in a Group Study Exchange. Increased donations will give greater access to safe drinking water, food supplies, and health care. Imagine once-malnourished children becoming doctors, newly literate people becoming teachers, and those in conflict areas becoming peacemakers.

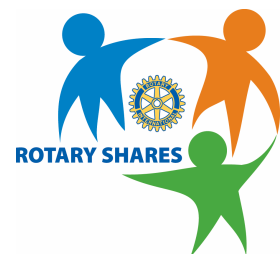
Learn how Rotarians are turning EREY into high-energy fuel for the Foundation's programs by subscribing to the free **Every Rotarian, Every Year** newsletter. Let's open this promising pipeline of help even further to a hurting world, bringing with it greater hope for understanding and peace.

*Robert S. Scott*



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## CONTRIBUTIONS UPDATE

*As of 30 September 2007, contributions to The Rotary Foundation totalled US\$21,221,010 - an increase of 10.58% over last year at this time. Giving to the Annual Programs Fund totalled US\$14,735,988 - an increase of 7.74%. Contributions to the Permanent Fund declined by 12.08%, and totalled US\$1,822,241. Restricted giving was up 35.50% to US\$4,662,780.*

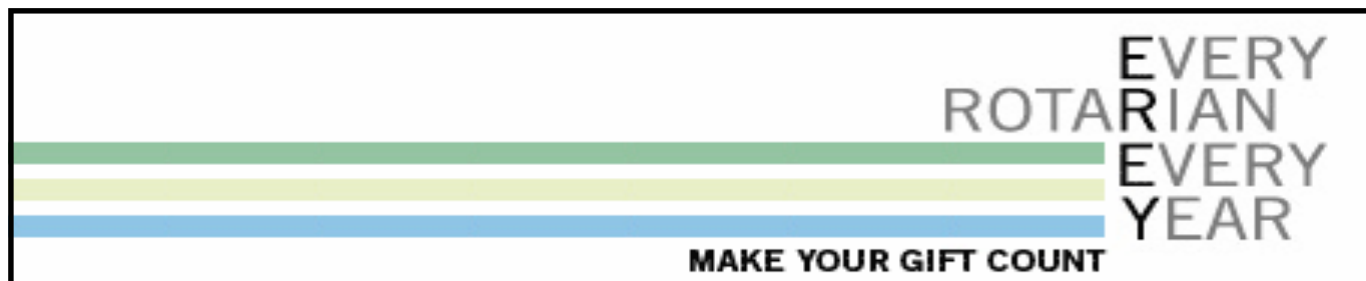
	<b>Increase</b>		
	<b>September 2007</b>	<b>September 2006</b>	<b>(Decrease)</b>
Annual Programs Fund	US\$14,735,988	US\$13,677,501	7.74%
Permanent Fund	US\$ 1,822,241	US\$ 2,072,558	(12.08)%
<u>Restricted Giving</u>	<u>US\$ 4,662,780</u>	<u>US\$ 3,441,293</u>	<u>35.50%</u>
<b>TOTALS</b>	<b>US\$21,221,010</b>	<b>US\$19,191,352</b>	<b>10.58%</b>

## 2006-2007 CLUB RECOGNITION BANNERS

The mailing of club recognition banners for the Top Three Per Capita Giving Clubs, 100% Rotary Foundation Sustaining Member Clubs and Every Rotarian Every Year Clubs in 2006-2007 was completed as of 19 October 2007. The banners and congratulatory letters were mailed to the current District Governors. Inquiries regarding banner recognition should be emailed to: [apf@rotary.org](mailto:apf@rotary.org) or to the Contact Center at [contact.center@rotary.org](mailto:contact.center@rotary.org). Foundation staff will be happy to review any discrepancies in banner recognition on a case-by-case basis.

## USA AND CANADA TAKE NOTE – CHANGES TO TRF DIRECT DONATIONS

Effective 1 November 2007, the Foundation is utilizing a new provider for the transmission of electronic fund transfers (EFT) through our TRF DIRECT Donations of automated recurring bank account contributions in Canada and bank account and credit card contributions in the United States. This transition should appear seamless to the donors. The use of a new provider to conduct our EFT transactions will enable the Foundation to offer Canadian Rotarians the option for recurring credit card withdrawals in the TRF DIRECT program effective 1 January 2008. TRF DIRECT brochures are currently being updated for Canada to reflect this change. Any questions related to TRF DIRECT can be sent to: [trfdirect@rotary.org](mailto:trfdirect@rotary.org) or you may call the Contact Center at: 1-866-976-8279.



## SHARE THIS GREAT NEWS

In 2006-2007, we achieved a worldwide per capita of US\$86.13, an increase of 11.85% over the 2005-2006 Rotary year. A total of 12 zones exceeded the US\$100 per capita and an impressive 83 districts achieved 100% participation, with every club in the district contributing to the Annual Programs Fund. Worldwide, there were 224,341 Rotary Foundation Sustaining Members and 257,508 Every Rotarian Every Year participants.

As of 30 June 2007, there were 177 districts reporting they had a Paul Harris Society with a reported membership of 4,415. Yet, worldwide there were 20,446 Rotarians who contributed \$1,000 or more to the Foundation and could be eligible to be Paul Harris Society members, if only their districts established one.

This November, let's take a serious look at how we can increase giving to our Foundation. Let's encourage every district in Zone 22 to establish a Paul Harris Society. Let's share the Rotary stories so all may be encouraged by the good work that Rotarians are accomplishing in their clubs and districts through Foundation District Simplified Grants, Matching Grants, Ambassadorial Scholars, World Peace Fellows, Grants for University Teachers, Individual Grants, PolioPlus Partners and more. Let's work to increase our membership and increase our participation in Foundation programs so we can retain our members.

Just remember...

***Every Rotarian, every project and every contribution makes a difference every year.***

## IT'S NEVER TOO EARLY TO REMIND ROTARIANS

In order to receive a tax receipt for contributions made in calendar year 2007, contributions must be post-marked before 31 December 2007 and received by the Foundation no later than 7 January 2008 to qualify as a 2007 contribution. Many clubs do a disservice to their members by holding on to member contributions well into the new calendar year. Encourage everyone to get their contributions in early.

## PAUL HARRIS SOCIETY (PHS)

After one year in operation, 177 districts in 18 countries around the world reported a total of 4,415 Paul Harris Society members as of 30 June 2007. The Rotary Foundation officially recognized the Paul Harris Society as a district-administered recognition program starting on 1 July 2006. For those districts interested in starting a PHS or increasing their membership, the Annual Giving Team can help districts identify potential prospects for PHS membership. Simply send an email message to: [apf@rotary.org](mailto:apf@rotary.org). PHS brochures and other information can be found on Rotary's website using this direct link: [www.rotary.org/newsroom/downloadcenter/pdfs/trf\\_phs\\_brochure.pdf](http://www.rotary.org/newsroom/downloadcenter/pdfs/trf_phs_brochure.pdf). Please note that all PHS recognition items must be purchased from licensed vendors.

## TOP GIVING COUNTRIES IN 2006-07

Country	Rank	Rotarians	% of All Rotarians	Clubs	% of All Clubs	Population in thousands	Rotarians per 1,000 Population	Annual Giving	Restricted Giving	Permanent Fund	Total Contributions	Annual Giving Per Capita
USA	1	379,545	31%	7,795	24%	295,734	1.3	41,587,631	9,269,114	5,140,644	55,997,389	\$109.57
Japan	2	99,574	8%	2,323	7%	127,417	0.8	11,193,073	490,308	1,551,300	13,234,681	\$112.41
Korea	3	54,722	4%	1,347	4%	48,641	1.1	8,041,011	259,523	726,372	9,026,906	\$146.94
India	6	93,029	8%	2,718	8%	1,080,264	0.1	4,768,673	692,009	1,826,877	7,287,559	\$51.26
Canada	4	27,843	2%	726	2%	32,805	0.8	3,332,885	1,233,642	964,678	5,531,205	\$119.70
Germany	7	46,431	4%	935	3%	82,431	0.6	3,502,339	909,638	100	4,412,077	\$75.43
Australia	9	33,950	3%	1,169	4%	20,090	1.7	2,535,914	886,423	970,086	4,392,423	\$74.70
Italy	8	42,112	3%	756	2%	58,103	0.7	3,482,064	768,555	137,313	4,387,932	\$82.69
UK	5	60,875	5%	1,785	5%	60,441	1.0	3,552,076	676,022	62,389	4,290,487	\$58.35
Brazil	12	51,454	4%	2,322	7%	186,113	0.3	2,793,718	303,866	43,590	3,141,174	\$54.30

## HUMANITARIAN GRANTS PROGRAM

### *District Simplified Grant Mailing Follow-up*

As announced in August 2007, the 2008-09 District Simplified Grant information packet was sent to all district leaders electronically for the first time. Using email for this purpose saved TRF a great deal in mailing costs and delivered this important information to district leaders almost instantaneously. Please note that hard copies were sent to district leaders if email addresses were not available or if an email attempt indicated a problem with delivery.

In addition, 37 districts will experience a reorganization during the Rotary Year 2008-09. Currently, the Planning and Administration division is recalculating the new DDF and DSG spending limits for these 37 districts. Once this is completed, TRF will send out the 2008-09 DSG mailing to the appropriate district leaders indicating their new spending limits for the 2008-09 DSG year.

If you have any questions or concerns about the 2008-09 DSG mailing, please contact the Program Officer for DSG, Shelby French, at [Shelby.french@rotary.org](mailto:Shelby.french@rotary.org) or 847-866-3832.

### *Humanitarian Grants District Support Forum*

The Humanitarian Grants Program has launched a new resource for district and regional leaders who are involved in Humanitarian Grants—the Humanitarian Grants District Support Forum. It had a few technological setbacks initially, but the Forum now seems to be up and running (with the exception of the discussion forum, which is still under repair). We encourage you to visit the site regularly to receive updated information pertaining to Humanitarian Grants. As always, we welcome any feedback that you might have regarding this resource. Comments and suggestions may be sent to Karen McLeod, [karen.mcleod@rotary.org](mailto:karen.mcleod@rotary.org).

## POLIOPLUS

The October PolioPlus Partners Open Projects List (OPL) contains eight (8) polio eradication projects in need of a total of US \$2,298,955. Two new projects have been submitted by the National PolioPlus Committees in Ethiopia and Democratic Republic of Congo.

[http://www.rotary.org/RIdocuments/en\\_pdf/ppp\\_openprojects.pdf](http://www.rotary.org/RIdocuments/en_pdf/ppp_openprojects.pdf) .

## POSSIBLE GRANT STRUCTURE FOR THE FUTURE

### **FUTURE VISION COMMITTEE SUGGESTED GRANT STRUCTURE**

The Trustees have received the report of the Future Vision Committee on the proposed grant structure for the future. The committee has received feedback on the future of The Rotary Foundation from surveys of Rotarians, selected focus groups, external consultants, and the general secretary and has utilized this feedback along with the priorities and goals approved by the Trustees, RI Board of Directors and the 2007 Council on Legislation. The proposed grant structure for the future is focused on the strategies and vision of The Rotary Foundation to be fully implemented in 2012.

The Future Vision Committee has recommended that the titles for the two types of proposed grants should be replaced by more descriptive names instead of the temporary titles of Type A Grants and Type B Grants.

The Future Vision Committee recommended in June 2007, that Type B Grants would include PolioPlus and any future corporate programs in the grant structure for the future, but they now conclude that PolioPlus and/or any future RI/TRF corporate program should be separate from the grant structure of the future.

**Type A Grants** in the new grant structure of the future have the following characteristics:

- relates and conforms to the mission of The Rotary Foundation;
- consists of block grants that will be managed and administered by Trustee-certified districts according to established guidelines and best practices for the distribution of grants;
- activities/projects preferably completed in less than 18 months;
- sustainability preferred but not required;
- funds used for a variety of eligible activities that are broad in scope;
- provides flexibility for clubs and districts in completing local projects;
- funds utilized for international projects in other countries, including non-Rotary countries and areas.

**Type B Grants** in the new grant structure of the future have the following characteristics:

- activities/projects take place in Rotary countries and non-Rotary countries and areas;
- clubs and districts may participate with cooperative relationship organizations at the local and international levels;
- greater role for and participation of Rotarian Action Groups;
- international partnerships (cooperative relationships) considered in broader terms;
- projects designed to support the areas of focus that are based on Rotarians' interests and specific selection criteria;
- focuses on long-term projects/activities (e.g. typically completed in 3-4 years except for Rotary scholarships);
- includes larger grant awards (minimum/maximum amounts to be determined);
- emphasizes competitive process for grant awards;
- considers Group Study Exchange and TRF scholarships in more strategic manner;
- encourages or requires sustainability;
- includes club and district developed grants and TRF packaged grants (names and titles under further consideration);
- agree to select three to five areas of focus for Type B Grants to ensure strategic use of Rotary's organizational expertise and resources in a way that:
  - differentiates the areas of focus from the corporate program of RI/TRF;
  - relates to TRF mission;
  - provides durability and long-term commitment (e.g. 10 years focus) on the priority world needs;
  - is narrow enough to construct specific strategies for sustainable beneficiary outcomes;
  - focuses on packaged grants with support from our strategic cooperative relationships where relevant;
  - demonstrates Rotarian involvement and ownership.

## EDUCATIONAL PROGRAMS

### **Rotary Centers Committee Meets to Select 60 New Rotary World Peace Fellows**

The thirteen Rotarian members and seven University Representatives of the Rotary Centers Committee met in Evanston 8-12 October 2007. In addition to discussing many varied topics relating to the program, the Committee selected 60 new Rotary World Peace Fellows for the 7<sup>th</sup> Class (2008-10), along with 9 alternates.

### **University of Queensland Rotary Center Receives Award from Queensland Government**

The Rotary Center at the University of Queensland was recently recognized by the Department of the Premier and Cabinet of the State of Queensland, Australia as an institution dedicated to enriching the international student experience. Rotary Center Past Director, Dr. Marianne Hanson and Rotary Center Host Area Coordinator Judy Magub received the award on behalf of the Center and TRF. The 2007 Celebrating International Education and Training Industry Showcase highlighted the best practices and contributions of Queensland's international education and training providers and individuals. Congratulations to all at the Rotary Center at UQ!



## **ROTARY PEACE AND CONFLICT STUDIES PROGRAM**

### **Call for Applications - July 2008 Session**

TRF is eagerly accepting applications for the July 2008 and all succeeding sessions of the Rotary Peace and Conflict Studies Program. Application forms and other materials are available on the RPCS webpage now listed under the "Students and Youth" section of [www.rotary.org](http://www.rotary.org). District endorsed applications for the July 2008 session is due to TRF by 1 December 2007. Contact Jenn Weidman at [jenn.weidman@rotary.org](mailto:jenn.weidman@rotary.org) with any questions.

### **Mandatory Attendance at Scholar Orientation Seminars**

For the fifth year, mandatory attendance at an outbound scholar orientation seminar is stressed in the following two communications from TRF:

- 1) E-mail addressed to District Governors acknowledging receipt of the 2008-09 Scholarship Applications from their districts;
- 2) Assignment letters sent to 2008-09 Ambassadorial Scholars.

Sponsor Districts and recipients of these letters are referred to the following link for an updated list of 2007-08 Regional Scholar Orientation Seminars:

<http://www.rotary.org/en/StudentsAndYouth/EducationalPrograms/AmbassadorialScholarships/Pages/About.aspx>

### **Scholarships Fund Pool for Low-Income Countries**

The Scholarships Fund Pool for Low-Income Countries Selection Committee will meet at RI World Headquarters 13-15 November 2007 to select up to 32 Ambassadorial Scholars to study during the 2008-09 program year. The Trustee-appointed selection committee includes current RRFC Alan Hollands and past RRFCs Sam Okudzeto, P.T. Prabhakar and Rudolf Hörndler. Contact: Renée Stephenson, Resource Development Senior Supervisor, tel: 847-866-3314; fax: 847-866-0934; email:

[Renee.Stephenson@rotary.org](mailto:Renee.Stephenson@rotary.org).

## GROUP STUDY EXCHANGE

### *New GSE Coordinator*

The GSE department is pleased to announce that a new coordinator has been hired. Rebecca Crall comes to the GSE department from Rotary International. She will be working with Zones 10, 13, 14, 15, 16, 19, 20, 21 and 34. Please feel free to contact Rebecca via e-mail at [Rebecca.Crall@rotary.org](mailto:Rebecca.Crall@rotary.org) or by phone at 847-866-3327.

### *2007-08 GSE CD ROM*

The GSE department would like to alert all districts that are new this year that both the Team Member Handbook CD ROM and the Program Guide for Rotarians CD ROM have been combined into one comprehensive CD. By now all Rotary districts have received this CD, and are encouraged to distribute the CD to any interested GSE applicants. Additional CDs can be ordered online, free of charge. Please contact your GSE Coordinator at TRF if you are interested in ordering additional CDs.

### *Interactive GSE Program Materials*

This year, all GSE program materials on the GSE 2007-08 CD ROM are interactive and can be completed electronically. The GSE department would like to encourage all districts to submit typed team member and team leader applications, as well as GSE Medical, Insurance and Travel Request Forms. Should you have any questions about the new program formats, please contact your GSE Coordinator.

### *2008-09 GSE Partnerships and Confirmation*

TRF will send out 2008-09 GSE pairing confirmation notices via e-mail starting in November 2007. We encourage Governors-elect to immediately contact their partners once they receive their confirmation of the pairing in order to fill out the GSE Travel Information Form. This form is due to the GSE department no later than **1 January 2008**.

Districts that are seeking Trustee pairings for participation in the GSE program for 2008-09 should remain flexible to partnering with regions/countries they have not partnered with in the past 5-10 years.

**Themistocles Pinho**, 1991-92 GSE team leader alumnus sponsored by District 4750 (Brazil) to District 5710 (Kansas, USA), has taken office as RI Director for 2007-09. Director Pinho became a Rotarian in 1971, has been on several committees, and has won several awards. He was also a Polio Plus volunteer in 1989-90

### *SHARE Tip of the Month*

Wondering where to find *SHARE* on the new rotary.org? Go to the **Contribute** tab. Click on **Funds** (underneath Contribute). On the left is a link to **SHARE**. Click on the link and you will be taken to a brief description of the *SHARE* system. From there, you can click on a link to the *SHARE* kit, as well as links to the programs funded through *SHARE*

## ALUMNI RELATIONS

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 preconvention event tailored to TRF alumni and interested Rotarians and includes workshops, networking opportunities, featured speakers, and a reception. For additional information go to [www.rotary.org/events/conventions/2008](http://www.rotary.org/events/conventions/2008).

### *Change in RFAC Leadership*

Don Osburn will no longer be serving as RFAC general coordinator. Effective 16 November, Rodney Mazinter has accepted the position of general coordinator and will serve until the end of the Rotary year.

### *Comments from General Coordinator Rodney Mazinter*

I wish to pay tribute to, and thank Don Osburn for his work, sage advice and friendship over the time he has served as general coordinator of RFACs. He entered into the spirit of the program with energy, bringing his wealth of experience in Rotary to our discussions. His inability to continue will be viewed with regret by those who were privileged to work with him. We wish him well in his future work in Rotary. Rotary is more than an organization made up of men and women providing service; the whole is much greater than its parts. Rotarians come and go but their departure makes no difference to the ideals that were created in the minds and hearts of its founders and those who followed. With intellect and compassion Rotarians down the years strove to mould an institution that attracts men and women of all ages, cultures and religions to its banner. During Rotary Foundation month it is worth remembering the insightful genius that has extended Rotary's ideals to encompass talented young people, not only to give them an undreamed of opportunity, but to help Rotary extend its standards of peace, personal fulfillment, service, ethics, fellowship and world understanding among the "family of nations." That this effort is a success is borne out by the influence that these alumni of The Rotary Foundation have, not only while living out their time of scholarship or exchange, but long afterwards as they carve out their independent life's niches, impacting on the human condition by means of what Rotary has helped them achieve. Their vision is Rotary's and Rotary's vision is theirs. We can do no better for the growth/survival of Rotary in the 21st Century than to explore every effort to keep them close, culminating in bringing them into Rotary.

### *Rotary Centers Alumni on the move*

**Francesca Giovannini** (University of California-Berkeley 2004-06) Peace & Conflict Studies Instructor, University of California - Berkeley

**Judith Norton** (University of Bradford 2003-05) is a Research Assistant at the Center for International Trade and Security (CITS) at the University of Georgia (UGA). She is also a Ph.D. candidate in Comparative Studies/ International Relations at the University of Georgia (UGA).

**Crystal Procyshen** (International Christian University 2003-05) is an analyst for the Iraq Program at the Canadian International Development Agency.

**Arik Gutler Ofir** (University of Queensland 2004-06) works as a theatre facilitator with Arabs and Jews in Israel. He is producing the "Peace and Social Justice" festival of short plays at the Al-Laz Theatre in Acre, Israel for the Theatre of the Oppressed Centre. The festival will occur in June 2008.

**Sukthawee Suwannachairop** (University of Queensland 2004-06) will be teaching conflict resolution at the undergraduate level in Nicaragua.



# GATES/ROTARY FUNDING ANNOUNCEMENT

**Wilfrid J. Wilkinson**  
*President, 2007–08*

**Robert S. Scott**  
*Chairman, 2007–08*

Dear Fellow Rotarians,



This is a historic day for Rotary. It is our great pleasure to inform you of a new partnership between Rotary International and the Bill & Melinda Gates Foundation that will provide a much needed US\$200 million in support of our top goal of a polio-free world.

The Gates Foundation has awarded The Rotary Foundation a challenge grant of \$100 million, which Rotary will match, dollar for dollar, over three years. This is the largest single grant ever given to a volunteer service organization and represents a tremendous validation of the approach and success of our PolioPlus program.

This partnership comes at a critical juncture for the polio eradication initiative, which needs an infusion of funds to reach the eradication goal. For this reason, the initial \$100 million will be distributed by The Rotary Foundation through grants to the World Health Organization and UNICEF in direct support of polio immunization activities in 2008.

Your participation in this effort is crucial to making it a success. The Rotary International Board of Directors and the Trustees of The Rotary Foundation have unanimously agreed to accept this challenge grant to ensure the success of the PolioPlus program. We feel confident that this extraordinary commitment from the Gates Foundation and Rotary will serve as a catalyst for further donations from others to help us realize the dream of a polio-free world.

In 1985, we promised every child a world free from the threat of polio, and we are almost there. This funding agreement between Rotary and the Gates Foundation is a huge step forward, bringing us even closer to our goal. Success is our only option.

One Rotary Center  
1560 Sherman Avenue  
Evanston, Illinois  
60201-3698 USA  
TEL 847.866.3000  
FAX 847.328.8554  
www.rotary.org

**Wilfrid J. Wilkinson**  
Rotary International, President 2007-08  
Chairman 2007-08

**Robert S. Scott**  
The Rotary Foundation,

For more information visit:

[http://www.rotary.org/en/MediaAndNews/PressCenter/PressReleases/Pages/071120\\_pr\\_gates.aspx](http://www.rotary.org/en/MediaAndNews/PressCenter/PressReleases/Pages/071120_pr_gates.aspx)

## Zone 22 Regional Rotary Foundation Seminar

Jan. 19, 2008  
Dist. 5010, 5020, 5040, 5050, 5060,  
5080, 5360, 5370, 5550



### Seminar Agenda

- Update on TRF Grant Policies
- How to increase Club & District Donations
- Every Rotarian-Every Year Humanitarian & Education Programs update
- TRF Resources- where to find them
- Donor Recognition

Hotel Rooms are available at \$99.00 plus tax, includes parking & airport shuttle Phone 1-800-268-1133 and quote "Rotary International".

This rate is only available until Dec. 22, 2007

Delta Vancouver Airport Hotel, 3500 Cessna Drive, (Vancouver) Richmond, BC

### Keynote Speaker

Jose Tenga

*Rotary World  
Peace Fellow*



Registration, agenda, hotel link, directions and list of speakers all at [www.RotaryEvents.ca](http://www.RotaryEvents.ca)

**Registration — \$50.00**

For information go to  
[www.RotaryEvents.ca](http://www.RotaryEvents.ca)

Please Pre-register  
Download registration form at  
[www.RotaryEvents.ca](http://www.RotaryEvents.ca)

## DIRECTOR TRF CITATIONS 2006/2007

### THE FOLLOWING AWARDS WERE PRESENTED AT THE HALIFAX ZONE 22 INSTITUTE

1. Achieving the largest percentage increase in total TRF Permanent Fund contributions among clubs in a District - PDG Bill Patchett, District 7070.
2. Achieving the largest per member US\$ amount of giving to the Polio Partners Program - PDG Bill Patchett, District 7070
3. Achieving the largest percentage increase in per capita contributions to the Annual Programs Fund - PDG Bill Patchett, District 7070
4. Achieving the largest percentage increase in total TRF contributions among clubs in a District - PDG Raju Paul, District 5360
5. Achieving the largest percentage increase in total Paul Harris Fellows among clubs in a district - PDG Kevin Conway, District 5040
6. Achieving the largest percentage increase in total number of TRF Major Donors in the District - PDG Dave Vose, District 5580
7. Achieving the largest percentage increase in the total number of TRF Bequest Society Members among clubs in the District - PDG John Tomlinson, District 7010
8. Achieving the largest numerical increase in the number of TRF Benefactors in the district - PDG Eric Frederickson, District 5020
9. In recognition of exemplary effort in making an outstanding contribution to Rotary International in achieving the "Every Rotarian – Every Year" goal of \$100/Rotarian in the district.

5010 PDG Gayle Knepper

5020 PDG Erik Frederickson

5040 PDG Kevin Conway

5050 PDG Rod Thomson

5060 PDG Jeff Den Biesen

5080 PDG Tom Halazon

5360 PDG Raju Paul

5370 PDG Ed Willson

5550 PDG Rick Felstead

6330 PDG Pat Voegelin

6380 PDG Gerry Jackson

6400 PDG Dave Carpenter

7010 PDG John Tomlinson

7070 PDG Bill Patchett

7080 PDG Syd Harmon

7090 PDG Dick Earne

## TRF SERVICE AWARD FOR A POLIO FREE WORLD

This award was established by the Trustees of The Rotary Foundation to recognize outstanding contributions to the polio eradication effort and to encourage participation in the final eradication work.

Two Rotarians from Zone 22 are recipients of the award this year and were recognized at the Zone 22 Institute. They are:

- PDG Chris Offer, District 5040 and
- PDG Terry Youlton, District 6380

## NOT ALL ASSETS ARE EQUAL

*PDG Chris Offer, Annual Program Fund Strategic Advisor*

Different assets have different tax liabilities. For instance, final income tax on registered funds is on market value, but for stocks, only the difference between market value and original cost is taxable. Consider this:

Susan has three grown children and actively supports a number of charities including The Rotary Foundation. She is planning to update her will. Let's assume she has five main assets in her estate worth \$300,000 each:

Asset	Market Value	Original Cost	Tax Liability
Primary residence	\$300,000	\$150,000	\$0
Vacation home	\$300,000	\$150,000	\$32,775
Combined RRIFs*	\$300,000	\$150,000	\$131,300
Non-registered stocks	\$300,000	\$150,000	\$32,775
Cash/TBills/GIC	\$300,000	N/A	\$0

\* *Registered Retirement Income Fund (RRIF)*

In evaluation which assets to bequeath to children and charity, including The Rotary Foundation, the ones with the least tax liability should pass to the family. Assets with the highest tax liability are best suited as charitable gifts. This reduces the taxes payable by Susan's estate.



A Zone 22 newsletter with information about the Rotary Foundation, produced by:



**PDG Richard Clarke**, Regional Rotary Foundation Coordinator, Zone 22 East— Districts 6330, 7010, 7040, 7070, 7080, 7790, 7810, 7820

Phone: 416-326-5620  
Email: [clarker@sympatico.ca](mailto:clarker@sympatico.ca)



**PDG Leigh Higinbotham**, Regional Rotary Foundation Coordinator, Zone 22 West— Districts 5010, 5020, 5040, 5050, 5060, 5080, 5360, 5370, 5550

Phone: 604-263-0033