

## RESOURCE GUIDE FOR ZONES 25 & 26

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**Note:** This [Resource Guide for Zones 25 & 26](#) is not an official Rotary International publication but a regional resource compiled by your Annual Giving Officer to assist with accessing various Rotary tools. This Resource Guide supplements [The Rotary Foundation Reference Guide \(219\)](#) which is an official publication of Rotary International. The Reference Guide (219) is a booklet that provides a brief overview of Rotary Foundation programs including PolioPlus, Rotary Peace Centers, Grants, Alumni, Foundation Funding, Recognition, Foundation Recognition Points, Foundation Awards and General Resources.

**Note:** all [blue underlined](#) text in this document are hyperlinks to online resources.

**Location:** This guide is housed on the [Zones 25 & 26 Website](#) (click on “TRF” → click on “TRF Resources” at the bottom left of the page → click on “Resource & Reference Guides” folder → click on the “TRF Resource Guide for Zones 25 & 26” pdf file.)

**Feedback:** Please send any feedback about this Resource Guide to: [steven.solomon@rotary.org](mailto:steven.solomon@rotary.org)

# ACHIEVING EREY SUCCESS

## Every Rotarian, Every Year

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Here are some ideas for achieving Every Rotarian, Every Year (EREY) success which you can use in your newsletters, on your websites, in your club presentations and at your trainings.

1. **Before encouraging others to give, you should be a donor first.** If you haven't yet made your annual gift, lead by example and [contribute today](#). Consider automating your gift through [Rotary Direct](#), Rotary's recurring giving program.

\*For more on Rotary Direct, see page 5 in this Resource Guide and check out the [Rotary Direct frequently asked questions](#).

Every Rotarian is encouraged to participate in a Rotary Foundation program and contribute to the Annual Fund every Rotary year. The Annual Fund is the primary source of funds for The Rotary Foundation activities. Contributions help Rotarians carry out a broad range of local and international projects making the world a better place.

\*For more on Annual Fund & SHARE, visit our [web page](#), read the [EREY brochure \(957\)](#) and [The Rotary Foundation Reference Guide \(219\)](#).

The percentage of participation is an important metric for encouraging growth in giving to our Annual Fund. Educating Rotarians about The Rotary Foundation and encouraging everyone to give something to the Annual Fund (i.e. become EREY Rotarians) is a great way to reach your Annual Fund goals and more importantly create a culture of giving in your club.

\*Request a Banner Recognition Report by emailing [contact.center@rotary.org](mailto:contact.center@rotary.org) to see the percentage of participation for the EREY and Sustaining Members in your club.

2. **People give because they are asked to give.** If Rotarians are not aware of the need, you cannot expect them to respond. 2012-13 RI President Sakuji Tanaka said, "I never lost a friend when I asked them to give to Rotary." The Rotary Foundation is an incredible vehicle for building a better world. Our agents of change, Rotary clubs, are filled with architects of peace--- Rotarians. Your contributions to the Annual Fund-Share help empower Rotarians to make their communities better.

\*Use the EREY Eligibility Report to monitor the Annual Fund support by the individuals in your club for the current and prior Rotary year. You can provide friendly reminders to those who have yet to make their gift for the current Rotary year and thank those that have made contributions.

\*Use this [handout](#) to help you formulate responses to some common donor rejections and misunderstandings.

3. **Thank and recognize Rotarians who support The Rotary Foundation so they know they are appreciated.** Through our collective contributions to The Rotary Foundation, we continually find meaningful ways to help others. The Rotary Foundation is a premiere international service organization that leverages local experience and professional know-how to help communities help themselves.

<b><u>Presentation Remarks (Recognition)</u></b>		
<b>Annual Giving</b> <a href="#">Paul Harris Fellow</a>   <a href="#">Multiple Paul Harris Fellow</a> <a href="#">Paul Harris Society</a>   <a href="#">Major Donor</a>	<b>Planned Giving</b> <a href="#">Benefactor</a> <a href="#">Bequest Society</a>	<b>Club Banner</b> <a href="#">100% Paul Harris Fellow Club</a>

\*Use the EREY Eligibility Report to see the Rotarians who supported the Annual Fund during the current and prior Rotary years. Thank those who have given to the Annual Fund and also remind those who have yet to make a gift. When recognizing Rotarians and Friends of Rotary for their Foundation contributions, ask them to share why they give. These testimonials are excellent opportunities for demonstrating Rotary's impact and may lead to inspiring others to get involved and give to Rotary.

\*Learn about individual recognition opportunities; see pages 7-8 in this Resource Guide.

4. **People give to people.** When Rotarians contribute to The Rotary Foundation, they are supporting the programs and projects identified, developed and managed by their fellow Rotarians all over the world. Your gifts help Rotarians just like you to better their communities. Involved Rotarians remain Rotarians for life. The Rotary Foundation is unique since we inspire our members to participate in both giving and being involved with our projects.

5. **Share the Foundation message with every Rotary club, Interact club & Rotaract club in your district.** Arrange club presentations or ongoing education so that Rotarians understand why The Rotary Foundation can become their charity of choice. Creating a culture of giving and supporting The Rotary Foundation can be achieved through educating your club and prospective members.

\*Use the [TRF Weekly Thoughts](#), [TRF 52 Weekly Messages](#), and our [Photos & videos](#) to share our impact at your Rotary events.

\*Use the Monthly Contribution Report and Club Fundraising Analysis to monitor your club's contributions.

6. **Fundraising is not just asking for a gift, it [inspires](#) people to give.** Tell the story of Rotary. Your gift is used to fund high impact, sustainable solutions to pressing needs around the world. Talk about The Rotary Foundation projects you've been personally involved in, those which have been a life-changing experience for you and for those helped by the project. We need to do more to share the stories of The Rotary Foundation. Inspiration leads to joyful giving which results in recurring gifts rather than obligatory giving.

\*Use these videos (below) as programs or commercials at your Rotary events.

<b>Videos</b>			
Use these <a href="#">instructions</a> for downloading <a href="#">Rotary Videos</a> from <a href="#">www.vimeo.com</a>			
<b>Areas of Focus</b> <a href="#">Vision for a Better World</a>  <a href="#">Doing Good in the World</a> <ul style="list-style-type: none"> <li>• <a href="#">Promote peace</a></li> <li>• <a href="#">Fight disease</a></li> <li>• <a href="#">Provide clean water</a></li> <li>• <a href="#">Save mothers &amp; children</a></li> <li>• <a href="#">Support education</a></li> <li>• <a href="#">Grow local economies</a></li> </ul>	<b>Foundation Grants</b> <a href="#">Improving Our Foundation</a> <a href="#">Lessons Learned</a> <a href="#">Sustainability</a> Grants: <a href="#">District</a>   <a href="#">Global</a> <a href="#">Vocational Training Teams</a>	<b>Global Stories</b> <a href="#">Australia (Men's Shed)</a>   <a href="#">Australia (Rodeo)</a>   <a href="#">Fiji</a>   <a href="#">Ghana</a>   <a href="#">Guatemala</a> <a href="#">Haiti</a>   <a href="#">Honduras</a>   <a href="#">India</a>   <a href="#">Japan</a> <a href="#">Mongolia</a>   <a href="#">Poland</a>   <a href="#">South Africa</a> <a href="#">Ukraine</a>   <a href="#">USA</a>	<b>End Polio Now</b> <a href="#">Rotary Fights</a>   <a href="#">PolioPlus</a> <a href="#">CDC &amp; Rotary Partnership</a> <a href="#">Shot Felt Around the World</a> <a href="#">This Close</a> <a href="#">Final Inch</a>   <a href="#">Last Hurdle</a> <a href="#">South East Asia is Polio-Free</a> <a href="#">After the Rains</a>   <a href="#">Pakistan</a> <a href="#">Crutch</a>   <a href="#">Tree</a>   <a href="#">Faces</a>
	<b>Peace Centers</b> <a href="#">Voices for Peace</a> <a href="#">Practicing Peace</a>	<b>Donor</b> Thank you: <a href="#">2014</a>   <a href="#">2015</a> Dinner 2014: <a href="#">Major Donor</a>   <a href="#">AKS</a>	

7. **Explain why The Rotary Foundation is viewed positively by charity rating services.** “In 2013, The Rotary Foundation earned a grade of A+ from the [American Institute of Philanthropy](#), a top rating of four stars from [Charity Navigator](#), and full accreditation from the [Wise Giving Alliance](#) of the Better Business Bureau, based on the previous year's results.

In fiscal year 2012-13, only 2 percent of Foundation expenditures went to administrative expenses and 9 percent to fundraising. The Foundation directed 89 percent of its spending to programs, far exceeding the benchmarks that independent charity-rating services view as a measure of high efficiency.” ([2012-13 Annual Report](#) page 27).

\*Visit our [Financials page](#) to learn why Rotary is an organization you can trust and support in confidence.

8. **“Give generously to create a better world”** is what Knight Kiplinger suggests in his article [“Eight Keys to Financial Security.”](#) Kiplinger writes, “Your own financial security depends far more than you may think on the financial, physical and spiritual health of others in your community, our nation, our world. When you share your good fortune by donating your money, time and talent to charity, you help create a stronger economy and a healthier, safer world.” Consider joining the [Paul Harris Society](#) and give joyously to the Foundation and be personally fulfilled knowing that your gift is *doing good in the world*.

\*Learn more about the Paul Harris Society; contact your [District Paul Harris Society Coordinator](#) and see page 6 in this Resource Guide.

9. **Club recognition can motivate giving.** The Foundation Trustees like to thank clubs for their support by awarding club banners.

\*Learn about club recognition opportunities; see page 9 in this Resource Guide.

10. Here are some more [fundraising ideas](#).

# MY ROTARY AND ROTARY CLUB CENTRAL

The member website, known as [My Rotary](#), is where you will find everything you need to conduct your Rotary business. Watch this [webinar](#) to learn more about My Rotary. Familiar tools and applications, formerly in Member Access, is now found under Club & District Administration. [Create an account](#) and [sign in](#) so you can:

- Customize and share your profile
- Join or start a [discussion group](#)
- [Find volunteers, partners, and donations for your projects](#)
- View a [dashboard](#) of important links, documents, and online communities
- Through [Rotary Showcase](#), learn about service projects worldwide and put your club's project on display
- Use Rotary Club Central which helps clubs monitor their membership initiatives, service activities, and Foundation giving. Watch this [webinar](#) to learn more about Rotary Club Central.
- [Contribute](#) to The Rotary Foundation, view your Donor History Report which includes your contribution history and recognition summary.
- Search a dedicated [Document Center](#) to find important resources by category

**Note:** The desktop version of the site must be viewed on modern browsers – Internet Explorer 9 or higher, Chrome, Firefox and Safari.

Rotary Club Central Goal Setting			
Task	Club Member	Club Leader	District Leader
View Goals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Goals		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

\*To access Rotary Club Central, click on “My Rotary” and you will see “My Club Snapshot” box on the left side of the screen → click on “View Rotary Club Central”

Contribution & Recognition Reports				
Reports Available	Club Member	Club Leader	District Leader	Zone Leader
Donor history report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Club Fundraising Analysis Major Donor, Arch C. Klumph and Bequest Society Report Monthly contribution report Club recognition summary PolioPlus SHARE Every Rotarian, Every Year Donor history report Benefactors		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

\*To access reports click on “My Rotary” → click on “Manage” → click on “Reports”

\*Club treasurers, club Foundation chairs and club Membership chairs gain access after the current President, Secretary and/or Executive Secretary add them through their “My Rotary” “Club Administration” section by “Add/edit/remove club officers.”

Rotary Club Central <a href="#">Resources</a>	
Club:	<a href="#">Guide</a> • <a href="#">PowerPoint</a> • <a href="#">Webinar</a> • <a href="#">PETS Planning Worksheet</a> • <a href="#">Foundation Goals Worksheet</a>
District:	<a href="#">Guide</a> • <a href="#">Webinar (for Assistant Governors)</a>

Questions	
My Rotary	Rotary Club Central
<b>Rotary Support Center</b> Telephone: 866-976-8279 Email: <a href="mailto:contact.center@rotary.org">contact.center@rotary.org</a>	<b>Club &amp; District Support</b> See page 17 to find your representative

# ROTARY DIRECT

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## Define

[Rotary Direct](#) (formerly known as TRF-Direct) is Rotary's recurring giving program. You can set up recurring gifts to the Annual Fund, PolioPlus Fund and/or the areas of focus. Select an amount, frequency (monthly, quarterly or annually), and contribution method (debit or credit card).

**Note:** Individuals can enroll in Rotary Direct by using a debit card linked to a checking account.

## Purpose

Save time, money & lives by signing up for Rotary Direct. This is the most efficient method for ensuring that your contributions go directly to The Rotary Foundation resulting in faster processing and achievement of your club and personal charitable goals. This convenient method minimizes work for you and your club leadership by setting your own schedule of contributions that count toward your Paul Harris Fellow, Paul Harris Society, and Major Donor recognition. All contributions set up to the Annual Fund (including the areas of focus) count towards EREY and Sustaining Member recognition, as well as your club recognition banners.

## Sign Up

- a) **Web:** Rotarians can [contribute](#) online. The recurring option is presented in Step 2 of the contribution process under the section titled “\*Frequency.” This is the easiest and preferred method for supporting Rotary.
- b) **Handout:** Donors may enroll using the [Rotary Direct form \(USA\)](#) or [Rotary Direct form \(Canada\)](#).
- c) **Contribution Form:** Donors may enroll using [The Rotary Foundation Contribution form \(123\)](#) by checking the frequency box (monthly, quarterly or annually) under section “3. Contribution Details- Make this a recurring contribution.” You can fax forms to 847-328-4101.
- d) **Phone:** Donors may sign up or terminate their Rotary Direct participation by calling 866-976-8279.

## Frequency

If you choose to make a recurring contribution, you will be registering to make a gift every month, quarter, or year on the 1st of the month.

**Note:** Processing of quarterly donations occurs in July, October, January, and April. For annual contributions, you may choose the processing month.

## Modify

To make changes or terminate your account, call 866-976-8279 or email [rotarydirect@rotary.org](mailto:rotarydirect@rotary.org). For security reasons, please notify us by telephone to change or update your credit card information.

## Reports

The Club Recognition Summary identifies Rotary Direct participants in your club on the far right column. Please note that this report does not include contribution amounts due to Rotary's confidentiality and privacy policies.

\*See page 11 in this Resource Guide for more on using the Club Recognition Summary.

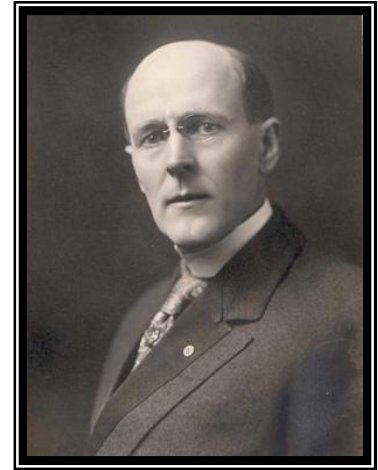
## Paul Harris Society

Individuals with recurring gifts through Rotary Direct (i.e. US \$85 monthly, US \$250 quarterly or US \$1,000 annually) automatically join the Paul Harris Society.

\*To learn more about the Paul Harris Society, contact [your District Paul Harris Society Coordinator](#) and see page 6 in this Resource Guide.



# PAUL HARRIS SOCIETY



## Define

The Paul Harris Society (PHS) is an official recognition program of The Rotary Foundation for individuals who personally contribute US \$1,000 or more to the Annual Fund, PolioPlus Fund and/or an approved global grant every Rotary year, when financially able. Contributions to the Endowment Fund and Disaster Recovery Funds are not eligible for PHS membership.

We say “when financially able” to allow some wiggle room if an individual is having financial issues one Rotary year that may prevent them from meeting their expressed intent as a PHS member.

## Join

Individuals with recurring gifts through **Rotary Direct** (i.e. US \$85 monthly, US \$250 quarterly or US \$1,000 annually) automatically join the Paul Harris Society; enrolling in Rotary Direct through the Rotary website is the preferred method for joining the Paul Harris Society. To make online-gifts recurring, you need to manually change the “frequency” under Step 2 of the contribution process. You can also sign up on the [Paul Harris Society webpage](#). Additionally, individuals can use the [PHS form](#) which can be faxed to 847-328-5260 or email [annualfund@rotary.org](mailto:annualfund@rotary.org) to sign up. Lastly, you can join over the phone through the Rotary Support Center by calling 866-976-8279.

## Questions & Resources

Your [District Paul Harris Society Coordinator](#) is the primary contact for your PHS questions and is responsible for providing PHS insignia for new PHS members. Your District Paul Harris Society Coordinator has a [PHS toolkit](#) that contains electronic resources to help promote PHS in your area including a [form](#), [brochure](#), [advertisement](#), [presentation remarks](#), [certificate](#), [charter certificate](#), [PowerPoint presentation](#), [district guide](#), frequently asked questions ([general](#) & [comprehensive](#)) and a [PHS Best Practices webinar recording](#). Visit the [Paul Harris Society webpage](#).



## Recognition

The Trustees approved the Chevron-style recognition pin as the official Paul Harris Society wearable recognition which is given to members in appreciation for their support by their [District Paul Harris Society Coordinator](#). The District Paul Harris Society Coordinator can request more insignia by emailing [annualfund@rotary.org](mailto:annualfund@rotary.org) with their preferred mailing address and reasonable quantities needed.

## Reports

- 1) The **Donor History Report** provides individual donors with their own Paul Harris Society eligibility for the current and previous Rotary year.
- 2) The **EREY Eligibility Report** is a club tool to identify potential members that lists PHS eligibility for the current and previous Rotary years.
- 3) The **Paul Harris Society Report** is a district tool that lists PHS membership and PHS eligibility for the current and three prior Rotary years. The second tab includes PHS join date, donor contact information including email, telephone and mailing address. This tab will be useful when doing email and mail merges (i.e. thank you letters, email reminders, invitations to recognition events, etc.)

Club	ID	Name	PHS Member	PHS Join Date	Rotary Direct	PHS Eligible 13-14	PHS Eligible 12-13	PHS Eligible 11-12	PHS Eligible 10-11
Chicago	13245	Paul Harris	Y	1 July 2013	Y	1 July 2013	1 July 2012	1 July 2011	1 July 2010
Chicago	24843	Arch Klumph	Y	4 May 2014		2 May 2014	22 March 2013	14 June 2012	8 May 2011

A “**PHS Member**” is an individual who has joined the Paul Harris Society and agreed to support the Foundation every Rotary year with a \$1,000 or more contribution to the Annual Fund, PolioPlus Fund and/or an approved global grant, when financially able.

A “**PHS Join Date**” is the day that Rotary International processed the request to add the PHS member.

“**Rotary Direct**” is an individual who is participating in Rotary Direct (Rotary’s recurring giving program.) Individuals with recurring gifts through Rotary Direct (ie US \$85 monthly, US \$250 quarterly or US \$1,000 annually) will automatically become PHS members.

“**PHS Eligibility**” tracks an individual’s achievement toward PHS recognition during a given Rotary year. The eligibility information provides opportunities for thanking donors, identifying prospective PHS members and sending contribution reminders for current PHS members (who are not giving through Rotary Direct).

# INDIVIDUAL DONOR RECOGNITION

The Rotary Foundation welcomes a number of opportunities to show its appreciation to individuals for supporting its grants and programs.

\*Through [My Rotary](#), you can view your **Donor History Report** which includes your personal contribution history and recognition summary. Request your Donor History Report by emailing [contact.center@rotary.org](mailto:contact.center@rotary.org)

## Rotary Foundation Sustaining Member

A Rotary Foundation Sustaining Member is an individual who personally contributes US\$100 or more each Rotary year to the Annual Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition. Contact your Rotary club president to obtain the annual [Sustaining Member badge sticker \(956\)](#) in appreciation of this achievement.

\*Use the EREY Eligibility Report to see your Rotary Foundation Sustaining members.

\*For more on Annual Fund & SHARE, visit our [web page](#), read the [ERFY brochure \(957\)](#) and [The Rotary Foundation Reference Guide \(219\)](#).



## Paul Harris Fellow

Paul Harris Fellow recognition is given in appreciation to anyone who contributes (or in whose name is contributed using Foundation recognition points), a gift of US\$1,000 or more cumulatively to the Annual Fund, PolioPlus Fund, or an approved global grant. The recognition consists of a certificate and pin. Other optional items include a [medallion \(PHF\)](#) for \$15 and a complimentary [Certificate Cover \(PHCEN\)](#).

\*Use the Club Recognition Summary to see your Paul Harris Fellows.



## Certificate of Appreciation

Certificate of Appreciation recognition is given to honor a business or organization. Since Paul Harris Fellows are only for individuals, a donor may use their Foundation recognition points to award a business or organization a Certificate of Appreciation.



## Multiple Paul Harris Fellow

Multiple Paul Harris Fellow recognition is extended at subsequent 1,000 levels. Recognition consists of a pin with additional stones corresponding to the recipient's recognition amount.

\*Use the Club Recognition Summary to see your multiple Paul Harris Fellows.

- 2,000 to 2,999.99 - one sapphire
- 3,000 to 3,999.99 - two sapphires
- 4,000 to 4,999.99 - three sapphires
- 5,000 to 5,999.99 - four sapphires
- 6,000 to 6,999.99 - five sapphires
- 7,000 to 7,999.99 - one ruby
- 8,000 to 8,999.99 - two rubies
- 9,000 to 9,999.99 - three rubies



## Paul Harris Society










The Paul Harris Society recognizes individuals who contribute US\$1,000 or more each Rotary year to the Annual Fund, PolioPlus Fund, or an approved global grant. Paul Harris Society contributions count toward Rotary Foundation Sustaining Member (Annual Fund contributions only), Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition. Recognition consists of a chevron style pin provided by your District Paul Harris Society Coordinator.

\*Read the [Paul Harris Society form](#) and see page 6 in this Resource Guide for more on the Paul Harris Society. Your District Paul Harris Society Coordinator has access to the Paul Harris Society Report which lists PHS members and their PHS eligibility in your district.

\*Use the EREY Eligibility Report to see your eligible PHS members.



# INDIVIDUAL DONOR RECOGNITION

<p><b>Major Donor</b> The Rotary Foundation recognizes individuals or couples whose combined giving has reached US\$10,000, regardless of the gift designation. This recognition level can be achieved only through personal contributions and not through Foundation recognition points. Major Donors may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level.</p> <p>*Contact your Major Gifts Officer to request a list of the Major Donors in your district.</p> <p>*Read the <a href="#">Major Gifts, Major Impact brochure (166)</a> for more on major gifts.</p>	<p>\$10,000 to \$24,999.99 – Level 1 \$25,000 to \$49,999.99 – Level 2 \$50,000 to \$99,999.99 – Level 3 \$100,000 to \$249,999.99 – Level 4</p> <p>*all currencies are in US dollars</p>	 
<p><b>Arch C. Klumph Society</b> Donors who contribute US\$250,000 or more become members of the Arch C. Klumph Society. Portraits, biographies and in some cases video clips are housed in the Interactive AKS Gallery, one of which is housed on the 17th floor of World Headquarters and another that travels to Rotary events internationally. Members also receive special lapel pins and pendants, signed certificates and invitations to exclusive AKS events held worldwide. New members are invited to a special induction ceremony at World Headquarters.</p> <p>*Contact your Major Gifts Officer to request a list of Arch C. Klumph Society members in your district.</p> <p>*Read <a href="#">Arch C. Klumph Society brochure (308)</a> for more on the Arch C. Klumph Society.</p>	<p>Trustees Circle \$ 250,000 to \$499,999.99</p> <p>Chair's Circle \$500,000 to \$999,999.99</p> <p>Foundation Circle \$1,000,000 and above</p> <p>*all currencies are in US dollars</p>	   
<p><b>Benefactor</b> A Benefactor is someone who informs The Rotary Foundation in writing that he or she has made a provision in his/her estate plans for The Rotary Foundation or by making an outright gift of US\$1,000 or more to the Endowment Fund. Benefactor recognition consists of a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin.</p> <p>*Use the Club Recognition Summary to see the Benefactors in your club.</p> <p>*Read <a href="#">Your Rotary Legacy brochure (330)</a> for more on giving to the Endowment Fund.</p>		
<p><b>Bequest Society</b> The Rotary Foundation recognizes couples or individuals who have made commitments in their estate plans totaling US\$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and a pin commemorating the commitment at each new recognition level.</p> <p>*Contact your Major Gifts Officer to request a list of Bequest Society members in your district.</p> <p>*Read <a href="#">Your Rotary Legacy brochure (330)</a> for more on giving to the Endowment Fund.</p>	<p>\$10,000 to \$24,999.99 –Level 1 \$25,000 to \$49,999.99 –Level 2 \$50,000 to \$99,999.99 –Level 3 \$100,000 to \$249,999.99 –Level 4 \$250,000 to \$499,999.99 –Level 5 \$500,000 to \$999,999.99 –Level 6 \$1,000,000 and above –Level 7</p> <p>*all currencies are in US dollars</p>	 







# CLUB BANNER RECOGNITION

The Rotary Foundation welcomes a number of opportunities to show its appreciation to Rotary clubs for supporting its grants and programs.

## Annual Fund Banner Recognition Status Report

This report displays a club's current Rotary year progress towards becoming an Every Rotarian, Every Year Club, a 100% Rotary Foundation Sustaining Member Club and the Top Three Per Capita in Annual Fund Giving banner recognition. Banner recipients listed in this report may fluctuate throughout the Rotary year due to changes in membership and additional or redistributed contributions. Final certification is processed by The Rotary Foundation following the close of the Rotary year.

\*Request the Annual Fund Banner Recognition Status Report by emailing [contact.center@rotary.org](mailto:contact.center@rotary.org)

<p><b>Every Rotarian, Every Year Club</b></p> <p>This banner is awarded to clubs that achieve a minimum US\$100 per capita giving and 100 percent participation with every active (dues paying) member contributing some amount to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year.</p> <p>*Use EREY Eligibility Report and Annual Fund Banner Recognition Status Report to determine if your club will qualify for this recognition.</p>	
<p><b>100% Paul Harris Fellow Club</b></p> <p>To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time banner recognition is requested by your district governor*. This banner recognition is only awarded one-time to a Rotary club but the intent is that the club will keep their membership at 100% Paul Harris Fellows in future Rotary years.</p> <p>*To obtain this recognition:</p> <ol style="list-style-type: none"> <li>1. A club representative must contact the district governor after determining that all current, dues-paying club members are Paul Harris Fellows</li> <li>2. The district governor must confirm that all members are Paul Harris Fellows by using the Club Recognition Summary and notify The Rotary Foundation by emailing <a href="mailto:contact.center@rotary.org">contact.center@rotary.org</a></li> </ol> <p>*Use Club Recognition Summary to determine if your club will qualify for this recognition. The top of the Club Recognition Summary will indicate if the club received the 100% Paul Harris Fellow Club banner along with the date this was achieved.</p>	
<p><b>100% Rotary Foundation Sustaining Member Club</b></p> <p>Rotary clubs must achieve a US\$100 per capita and every active (dues paying) member of the club must personally contribute \$100 or more to the Annual Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year and is based on active membership as of 30 June.</p> <p>*Use EREY Eligibility Report and Annual Fund Banner Recognition Status Report to determine if your club will qualify for this recognition.</p>	
<p><b>Top Three Per Capita in Annual Fund Giving</b></p> <p>Banners are given to the top three per capita giving clubs in each district. To be eligible, clubs must achieve a minimum US\$50 per capita in annual giving. This banner recognition is awarded at the conclusion of the Rotary year.</p> <p>*Use the Annual Fund Banner Recognition Status Report to determine if your club will qualify for this recognition.</p>	

# FOUNDATION RECOGNITION POINTS

## Define

Foundation recognition points are awarded to donors (individuals or organizations) who contribute to The Rotary Foundation through the [Annual Fund](#), [PolioPlus Fund](#) or an approved global grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Contributions to the [Endowment Fund](#) are not eligible.

Donors can extend Foundation recognition points to others to help them become or to name them as a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor uses the points or until the donor's death at which time they expire (unless the donor is a Major Donor and then their points may be used by their surviving spouse.)

**Note:** Foundation recognition points do not count towards Paul Harris Society or Major Donor recognition.

## Transfer Rules

A minimum of 100 Foundation recognition points must be transferred at a time, and an authorizing signature is required when completing the [Recognition and Transfer Request Form \(102\)](#).

**Note:** Foundation recognition points may not be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow themselves before Foundation recognition points are awarded.

Account	Authorize Transfer*	Report
Individual	Individual donor	Club Recognition Summary Donor History Report for an individual
Club	Club president	Club Recognition Summary Donor History Report for club**
District	District governor	Donor History Report for district**

\*these are the only individuals authorized to transfer Foundation recognition points from the account.

\*\*the reports are only available by emailing [contact.center@rotary.org](mailto:contact.center@rotary.org)

## Reports

### Donor History Report

When you log in to the Rotary website, you can view your personal contribution history, recognition amount, and available Foundation recognition points. To request a copy of the Donor History Report for an individual (requested by the donor), club (requested by your club leadership) or district (requested by the district leadership) email [contact.center@rotary.org](mailto:contact.center@rotary.org)

### Club Recognition Summary

Through [My Rotary](#), your club and district leadership can view the Club Recognition Summary, which provides your individual club members' recognition amount, Foundation recognition points available (to transfer to others), current Paul Harris Fellow level, and date that their Paul Harris Fellow level was achieved.

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	Last Contribution	Benefactor	Rotary Direct
132457	Paul Harris	Y	2,266	PHF +1	Jan-2013	1,500	July 2013 AF-SHARE	Y	
428413	Arch Klumph	Y	9,000 *	PHF +8	May-2014	11,897	May 2014 AF-SHARE	Y	Y

“**Recognition amount**” reflects all Paul Harris Fellow recognition an individual has accumulated through their personal contributions plus all Foundation recognition points given to the individual by other individuals, clubs, or districts. Foundation recognition points given to an individual do not count toward Major Donor recognition, and the maximum amount that can be shown on the Club Recognition Summary report is 9,000 (the “\*” sign indicates that the actual amount exceeds the 9,000-point maximum).

“**Foundation recognition points available**” reflects points that a donor has accumulated through personal outright giving to the Foundation. All points listed can be transferred to other individuals to help them achieve additional Paul Harris Fellow recognition.

# CLUB RECOGNITION SUMMARY



## The Rotary Foundation - Club Recognition Summary as of September 18, 2013

**Somewhere, IL, United States**  
100% Paul Harris Fellow Club 2012-2013

District ID: 9999	Paul Harris Fellows: 15	Bequest Society: 1	Rotarian Donors: 18	Rotary Direct Donors: 5	All-Time Giving: \$76,713.40
Club ID: 99999	Benefactors: 0	Major Donors: 1	Rotarian Non-Donors: 0	Non-Rotarian Donors: 0	

Rotary ID	N A M E	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor	Rotary Direct
99999	R/C of Somewhere					4,436.98	Jun-2013 POLIO PLUS		
1234567	Adams, John	Y	1,600.00	PHF	Apr-2008	600.00	Jun-2013 AF-SHARE	N	Y
7654321	Anderson, Jane	Y	9,000.00 *	PHF+8	Jun-2003	625.00	Jun-2013 AF-SHARE	Y	
2468102	Bakers, Bob	Y	1,300.00	PHF	Jul-2013	300.00	Jun-2013 AF-SHARE	N	Y

### Summary

Club Member's Data	Club Data
<ul style="list-style-type: none"> <li>Recognition amount</li> <li>Current Paul Harris Fellow (PHF) level</li> <li>Foundation Recognition Points Available</li> <li>Last contribution date and designation</li> <li>Rotary Direct participation</li> <li>Benefactors</li> </ul>	<ul style="list-style-type: none"> <li>Number of Paul Harris Fellows, Major Donors, Benefactors, Bequest Society members</li> <li>Number of Rotary Direct Donors, Rotarian Donors, Rotarian Non-Donors and Non-Rotarian Donors</li> <li>All-time giving</li> </ul>

### Sections

- A.** Indicates 100% Paul Harris Fellow Club and the date this was achieved.
- B.** District and club number appear on the top left
- C.** Number of club's Paul Harris Fellows and Benefactors
- D.** Number of Bequest Society Members and Major Donors
- E.** Number of Rotarian Donors and Rotarian Non-Donors
- F.** Number of Rotary Direct Donors and Non-Rotarian Donors
- G.** Total historical contributions to The Rotary Foundation credited to the club. Includes all contribution types (Annual Fund, Endowment Fund and Other Giving (which includes PolioPlus Fund and grants))
- H.** Identifying information by individual, including member ID (+ indicates deceased member), name, and membership status (Y = active member; N = former/deceased member or non-Rotarian with a contribution history; H = honorary member)
- I.** Recognition Amount, which can be a combination of cash contributions and Foundation recognition points received (points do not count toward Major Donor recognition). Maximum amount that can be shown on the report is 9,000 (9,000 \* indicates actual amount exceeds maximum)
- J.** Paul Harris Fellow/Multiple PHF status, and month and year first PHF recognition was achieved
- K.** Foundation recognition points available, which can be transferred to other individuals to help them achieve their first or multiple PHF recognition. Points accumulate 1:1 for every dollar contributed  
\*See page 10 in this Resource Guide to learn more about Foundation recognition points
- L.** Month & year along with the designation (program fund) of most recent contribution
- M.** Indicates Benefactor status. A Benefactor is anyone who informs The Rotary Foundation in writing that s/he has made provisions in their will, or other estate plan, naming the Endowment Fund as a beneficiary; or anyone who makes an outright gift of US\$1,000 or more to the Endowment Fund.
- N.** Rotary Direct status indicated (Y= Rotary Direct participant)

### How to use Foundation recognition points to encourage giving to The Rotary Foundation.

Many Rotary clubs use a matching system to help their members achieve PHF recognition and to promote additional Foundation support. To determine whether your club is close to achieving 100% PHF status, review the Recognition Amounts (section I) of all Rotarians who are currently listed as active club members (indicated by a Y in section H). Calculate the amount needed to get all members to at least 1,000. Matching their contribution with Foundation recognition points may help your club reach or even surpass its Annual Fund goal as well as achieve 100% PHF recognition. Use the [Paul Harris Fellow Recognition and Transfer Request Form \(102-EN\)](#) to transfer points.

# EREY ELIGIBILITY REPORT



ROTARY INTERNATIONAL  
THE ROTARY FOUNDATION

## The Rotary Foundation - EREY Eligibility Report

For Rotary Fiscal Year : Fiscal Year:

**A** District Id : 9999 Club Id : 99999

**B** Somewhere, IL, United States

EREY Member Donors: 11 Non-EREY Member Donors: 7

RFSM Member Donors: 6 Non-RFSM Member Donors: 12

PHS Eligible Donors: 2

Rotary ID	N A M E	Club Member	EREY Date Achieved Current Year	EREY Date Achieved Previous Year	Sustaining Member Date Achieved Current Year	Sustaining Member Date Achieved Previous Year	PHS Eligible Date Achieved Current Year	PHS Eligible Date Achieved Previous Year
1234567	Adams, John	Y	25-Jan-2008	31-Dec-2006	25-Jan-2008	31-Dec-2006		
7654321	Anderson, Jane	Y	09-Jul-2007	31-Dec-2006	09-Jul-2007	31-Dec-2006	09-Jul-2007	30-Jun-2007
2468642	Bakers, Bob	Y						

### Summary

Club Member's Data	Club Data
<ul style="list-style-type: none"> <li>Every Rotarian, Every Year (EREY)</li> <li>Rotary Foundation Sustaining Member (RFSM)</li> <li>Paul Harris Society (PHS)</li> </ul>	<ul style="list-style-type: none"> <li>Every Rotarian, Every Year (EREY) Club</li> <li>100% Rotary Foundation Sustaining Member (RFSM) Club</li> </ul>

\*See page 9 in this Resource Guide to learn more about club recognition opportunities and request a Banner Recognition Report by emailing [contact.center@rotary.org](mailto:contact.center@rotary.org)

### Sections

- A.** District and club number appear on the top left corner
- B.** Number of club's EREY Member Donors and Non-EREY Member Donors
- C.** Number of RFSM Member Donors and Non-RFSM Member Donors
- D.** Number of Paul Harris Society Eligible Donors
- E.** Club and individual identifying information appears on the left  
Account number = individual's membership ID number  
Plus sign (+) denotes a deceased individual.  
Y = active club member  
N = inactive club member (deceased, former member, non-Rotarian donor)  
H = honorary club member  
Total = number of contributing & non-contributing members for the current Rotary year
- F.** EREY status = at least US\$0.01 in Annual Fund contributions
- G.** RFSM status = at least US\$100 in Annual Fund contributions
- H.** PHS eligible status = at least US\$1,000 in Annual Fund, PolioPlus Fund and/or global grant contributions  
*\*Your District Paul Harris Society Coordinator has access to the Paul Harris Society (PHS) Report which lists PHS members and their PHS eligibility in your district.*

**Note:** PolioPlus Fund and Endowment Fund contributions do not count towards Annual Fund recognition opportunities and do not contribute to your club's annual giving goal.

### Foundation Funding

Your district Rotary Foundation committee decides how to use the district's DDF (District Designated Fund) allocations in consultation with the clubs in the district. Districts may choose to use up to 50 percent of their DDF for district grants. Remaining DDF may be used for global grants or donated to the PolioPlus Fund, Rotary's Peace Centers, or another district.

In addition to SHARE, donors may designate their Annual Fund contributions directly to the World Fund or to one of the Foundation's six areas of focus. Annual Fund contributions directed to any of the areas of focus are credited toward a club's annual giving goal and per capita giving calculations. Likewise, these contributions are eligible for all Annual Fund recognition opportunities including EREY, Rotary Foundation Sustaining Member, Paul Harris Fellow, Paul Harris Society, Major Donor and Arch C. Klumph Society. They also count toward all club recognition opportunities.

Contributions designated for areas of focus and World Fund are not included in a district's SHARE calculation and do not generate any increases in the amount of District Designated Fund. Because Annual Fund-SHARE contributions are the primary source of funding for Foundation grants, SHARE designated contributions from Every Rotarian, Every Year remain crucial and therefore are strongly encouraged.

\*For more on Annual Fund & SHARE, visit our [web page](#), read the [EREY brochure \(957\)](#) and [The Rotary Foundation Reference Guide \(219\)](#).



# MONTHLY CONTRIBUTION REPORT



ROTARY INTERNATIONAL®  
THE ROTARY FOUNDATION™

## Rotary Foundation Monthly Contribution Report

A 1-Jul-2012 to 30-Jun-2013

(In US Dollars)

Club No	Name	No. of Members	Annual Fund Goal Amount	AF Goal % Achieved	AF Per Capita	-- Annual Fund --		-- Other Funds --		-- Endowment Fund --		-- YTD Total --
						Month	YTD	Month	YTD	Month	YTD	
<b>District:9999</b>												
9999	District 9999 Contributions	0	\$0.00	0%	\$0.00	\$0.00	\$801.45	\$0.00	\$0.00	\$0.00	\$0.00	\$801.45
12345	Small Town, IL, United States	18	\$1,900.00	301%	\$318.06	\$3,825.00	\$5,725.00	\$380.00	\$480.00	\$0.00	\$0.00	\$6,205.00
6789	Big City, IL, United States	37	\$4,000.00	106%	\$114.86	\$500.00	\$4,250.00	\$125.00	\$225.00	\$0.00	\$0.00	\$4,475.00

### Summary

Club Data
Contribution history to the Annual Fund (AF), Other Funds (including global grants & PolioPlus Fund) and Endowment Fund during a Rotary year

\*See page 9 in this Resource Guide to learn more about club recognition opportunities.

### Sections

- A. Contribution data is finalized after the books for the previous month close, generally on the 15th of the month. Choose year (previous or current) to run data.  
\*Request Monthly Contribution Reports for other Rotary years by emailing [contact.center@rotary.org](mailto:contact.center@rotary.org)
- B. Club number and name
- C. Total club membership count is the starting membership figure based on the July semiannual report, received by Rotary International by September 30 each year. The membership count is populated once (usually in November) and remains the same until next Rotary year.
- D. The first set of data shown is for the Annual Fund:
  - *Annual Fund goal amount* reflects the number submitted via Rotary Club Central. (Clubs that do not submit a goal will show a US\$0.00 amount.)
  - *Annual Fund goal % achieved* is determined by comparing the annual giving year-to-date total with the AF goal amount. (Clubs that do not submit a goal remain at 0% throughout the Rotary year.)
  - *Annual Fund per capita amount* is determined by dividing the annual giving year-to-date total by the number of members.
  - *Annual giving totals* is the total amount given to the Annual Fund (including *Share*, *World Fund*, and *area of focus* contributions)
- E. Other Funds reflect contributions including global grants and PolioPlus Fund. Contributions to these funds do not count toward the Annual Fund goal for the Rotary year and do not affect the Annual Fund per capita giving ratio.
- F. Endowment Fund giving reflects outright contributions to the Endowment Fund. Contributions to the Endowment Fund do not count toward the Annual Fund goal for the Rotary year and do not affect the Annual Fund per capita giving ratio.
- G. The total is the club's combined giving total for Annual Fund, Other Funds (including global grants and PolioPlus Fund), and Endowment Fund contributions for the reporting period.

**Note:** This report is an excellent tool for tracking year-to-date giving for a Rotary year but does not separate contributions given to the Annual Fund-SHARE from Annual Fund contributions to the World Fund or the six area of focus designations. Request the SHARE Detail Report which contains giving to SHARE or District Designated Funds (DDF) by emailing [share.mailbox@rotary.org](mailto:share.mailbox@rotary.org)



# REPORTS AVAILABLE







Rotary leaders can access reports through their “My Rotary” by clicking on “Manage” → click on “Reports.”

\*To request a report e-mail [contact.center@rotary.org](mailto:contact.center@rotary.org)

Report	Information Available	Run	Format	Location
Donor History Report	<ul style="list-style-type: none"> <li>Provides a comprehensive breakdown of a donor’s transactions (contributions, Foundation recognition point transfers in/out, commitments and recognition)</li> <li>*Use to reconcile contributions/recognition issues</li> </ul>	individual	PDF	My Rotary Rotary Support Center
EREY Eligibility Report	<ul style="list-style-type: none"> <li>Provides eligibility dates achieved for EREY, RFSM and PHS for current &amp; previous Rotary years</li> <li>*See page 12 to learn how to read the EREY Eligibility Report</li> </ul>	club district	PDF Excel	My Rotary Rotary Support Center
Club Fundraising Analysis	<ul style="list-style-type: none"> <li>Provides a 5 Rotary year dashboard of Annual Fund goals, giving and recognition totals</li> <li>*Use to set goals which are submitted through Rotary Club Central</li> </ul>	district	PDF Excel	My Rotary Rotary Support Center
Club Recognition Summary	<ul style="list-style-type: none"> <li>Provides club member’s Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct participation, benefactors, last contribution date &amp; designation.</li> <li>Indicates 100% Paul Harris Fellow Club achievement and date along with the club’s all-time Foundation giving</li> <li>*See page 11 in this Resource Guide to learn how to read the Club Recognition Summary</li> </ul>	club district	PDF Excel	My Rotary Rotary Support Center
Monthly Contribution Report	<ul style="list-style-type: none"> <li>Provides contribution information by club for Annual Fund, Other Funds (global grants &amp; PolioPlus Fund) &amp; Endowment Fund</li> <li>*See page 13 to learn how to read the Monthly Contribution Report</li> <li>*Use to identify non-contributing clubs</li> </ul>	district	PDF Excel	My Rotary Rotary Support Center
Annual Fund Banner Recognition Status Report	<ul style="list-style-type: none"> <li>Shows current progress toward club banner recognitions (Top Three Per Capita in Annual Giving, EREY Club, 100% Rotary Foundation Sustaining Member Club) for a Rotary year</li> <li>*Lists the percentage of participation by club for EREY and Sustaining Membership recognition</li> <li>*Banner recipients listed in this report may fluctuate throughout the Rotary year due to changes in membership and additional or redistributed contributions. Final certification is processed by The Rotary Foundation following the close of the Rotary year.</li> </ul>	district	PDF Excel	Rotary Support Center
Paul Harris Society Report	<ul style="list-style-type: none"> <li>Provides PHS membership with PHS join date, &amp; a 4 Rotary year history of PHS eligibility</li> <li>Includes tab with donor contact information including email, telephone and mailing address.</li> <li>*See page 6 for more on Paul Harris Society</li> </ul>	club district zone	Excel PDF	Rotary Support Center
District Fundraising Profile	<ul style="list-style-type: none"> <li>Provides an 5 Rotary year dashboard for district giving to the Annual Fund, PolioPlus Fund, Endowment Fund and Total Giving</li> <li>Lists all-time recognition for Paul Harris Fellow, Benefactor, Bequest Society and Major Donor data</li> <li>Provides five Rotary years of Paul Harris Fellow, Benefactor, Bequest Society, Major Donors, Major Gifts, EREY, Sustaining Member and Paul Harris Society eligible data</li> <li>Lists number of total endowed funds and their market value</li> </ul>	district	PDF Excel	Rotary Support Center
Recognition Report	<ul style="list-style-type: none"> <li>Provides lists of Bequest Society, Major Donor and Arch C. Klumph Society members with their recognition date achieved</li> <li>Report includes two additional tabs with mailing address information</li> <li>*Use excel version for mail merge for invitations</li> </ul>	club district zone	PDF Excel	Major Gifts Officer

# HYPERLINKED RESOURCES

The names of hyperlinked resources appear with an underline and usually in a blue font. The printed resources with numbers can be either downloaded by clicking on the hyperlink or you can order them on the [Rotary website](#), by emailing [shop.rotary@rotary.org](mailto:shop.rotary@rotary.org) or by calling 847-866-4600.

<b>Ways to Give</b>		<b>Forms (Contribution, Recognition &amp; Awards)</b>	
Ways to Give: <a href="#">Brochure (173)</a> Objections & Responses: <a href="#">Handout</a> ▪ <a href="#">Web</a> ① <a href="#">Annual Fund</a> ② <a href="#">Areas of Focus Funds</a> ③ <a href="#">PolioPlus Fund</a>	④ <a href="#">Endowment Fund</a> ▪ <a href="#">Rotary Peace Centers</a> ⑤ <a href="#">Foundation Grants</a> Matching Gifts: <a href="#">Website</a> ▪ <a href="#">FAQ</a>	Rotary Direct: <a href="#">Form (US)</a> ▪ <a href="#">Form (Canada)</a> ▪ <a href="#">FAQ</a> ▪ <a href="#">Presentation</a> Contribution (123): <a href="#">Form</a> ▪ Multiple Donor (094): <a href="#">Form</a> Memorial & Tribute: <a href="#">Form</a> Paul Harris Society: <a href="#">Form</a> Recognition & Transfer Request (102): <a href="#">Form</a> Recognition Replacement: <a href="#">Form</a> ▪ Awards: <a href="#">Website</a>	
<b>Annual Giving (Every Rotarian, Every Year)</b>		<b>Planned (Your Rotary Legacy) &amp; Major Giving</b>	
Annual Fund: <a href="#">Website</a> ▪ <a href="#">Brochure (957)</a> ▪ <a href="#">Presentation</a> ▪ <a href="#">Blog</a> Rotary Foundation: <a href="#">Reference Guide (219)</a> ▪ <a href="#">Resource Guide</a> Doing Good in the World: <a href="#">Video</a> ▪ <a href="#">DVD (978)</a> Foundation Minutes: <a href="#">Weekly Thoughts</a> ▪ <a href="#">Weekly Messages</a> Rotary Direct: <a href="#">Form (US)</a> ▪ <a href="#">Form (Canada)</a> ▪ <a href="#">FAQ</a> ▪ <a href="#">Presentation</a> Paul Harris Society: <a href="#">Website</a> ▪ <a href="#">Form</a> ▪ <a href="#">Brochure (099)</a> ▪ <a href="#">Presentation</a> <a href="#">Webinar</a> ▪ <a href="#">Presentation Remarks</a> ▪ <a href="#">Advertisement</a> ▪ <a href="#">Certificate</a> Using Points: <a href="#">Handout</a> Objections & Responses: <a href="#">Handout</a> ▪ <a href="#">Web</a>		Major Gifts: <a href="#">Brochure (166)</a> ▪ Endowment Fund: <a href="#">Report</a> Bequest: <a href="#">Language</a> ▪ <a href="#">Brochure (330)</a> ▪ <a href="#">Website</a> ▪ <a href="#">Tax ID</a> Estate Planning: <a href="#">Handout (USA)</a> ▪ <a href="#">Handout (Canada)</a> Endowment Fund Programs: <a href="#">Handout</a> ▪ <a href="#">Donor Stories</a> Named Funds: <a href="#">Handout</a> ▪ Life Insurance: <a href="#">Handout</a> Donor Advised Fund: <a href="#">Handout</a> ▪ <a href="#">Circular (382)</a> ▪ <a href="#">Log In</a> Arch C. Klumph Society: <a href="#">Brochure (308)</a> Gift & Estate Planning Professionals Group: <a href="#">Guide</a> ▪ <a href="#">Webinar</a> ▪ <a href="#">Slides</a>	
<b>Rotary Alumni</b>		<b>Finance &amp; Investments</b>	
Alumni: <a href="#">Facebook</a> ▪ <a href="#">LinkedIn</a> ▪ <a href="#">Map</a> ▪ Associations: <a href="#">Map</a> Rotary Program Participation: <a href="#">Survey</a> Rotary Peace Fellows: <a href="#">Map</a>		Finance: <a href="#">Website</a> ▪ <a href="#">Reports</a> ▪ Investments: <a href="#">Report</a> ▪ <a href="#">Returns</a> ▪ <a href="#">Philosophy</a> Funding Model: <a href="#">FAQ</a> ▪ <a href="#">Presentations &amp; Notes</a> ▪ <a href="#">Webinar</a> ▪ <a href="#">Blog Post</a> ▪ <a href="#">Staff</a>	
<b>Rotary Peace Centers</b>			
Peace Centers: <a href="#">Website</a> ▪ <a href="#">PowerPoint</a> ▪ <a href="#">FAQ</a> ▪ <a href="#">Alumni Map</a> ▪ <a href="#">Newsletter</a> ▪ <a href="#">Leaflet (084)</a> ▪ <a href="#">Press Release</a> ▪ <a href="#">Rotarian Guide</a> ▪ <a href="#">Logo</a> <a href="#">Select a top scholar</a> ▪ <a href="#">Application</a> ▪ <a href="#">Recruitment</a> Voices for Peace: <a href="#">Video</a> ▪ Practicing Peace: <a href="#">Video</a> ▪ Social Media: <a href="#">Facebook</a> ▪ <a href="#">Blogs</a> Support Peace Centers: <a href="#">Website</a> ▪ <a href="#">Peace is Possible (850)</a> ▪ <a href="#">Pins (089)</a> ▪ Major Gifts: <a href="#">Letter</a> ▪ <a href="#">Newsletter</a>			
<b>Grants</b>			
Grants: <a href="#">Global Outlook (710)</a> ▪ <a href="#">Terms</a> ▪ <a href="#">Manual</a> ▪ <a href="#">Staff</a> District: <a href="#">Video</a> ▪ Global: <a href="#">Video</a> ▪ Packaged: <a href="#">Webinar</a> Online Fair for Grants: <a href="#">District Website</a> ▪ <a href="#">Global Website</a> Sustainability: <a href="#">Global Outlook (700)</a> ▪ <a href="#">Video</a> Vocational Training Teams: <a href="#">Fact Sheet</a> ▪ <a href="#">Video</a> Scholarships: <a href="#">Flier (132)</a> ▪ <a href="#">Fact Sheet</a> ▪ <a href="#">Best Practices</a>		Areas of Focus: <a href="#">Guide (965)</a> ▪ Managers: <a href="#">Staff</a>  Promote peace: <a href="#">Video</a> ▪ <a href="#">RAG</a> ▪ <a href="#">Global Outlook (704)</a>  Fight disease: <a href="#">Video</a> ▪ <a href="#">RAG</a>  Provide clean water: <a href="#">Video</a> ▪ <a href="#">RAG</a> ▪ <a href="#">Global Outlook (701)</a>  Grow local economies: <a href="#">Video</a> ▪ <a href="#">RAG</a>  Save mothers & children: <a href="#">Video</a> ▪ <a href="#">RAG</a>  Support education: <a href="#">Video</a> ▪ <a href="#">RAG</a>	
<b>PolioPlus Giving (End Polio Now)</b>			
End Polio Now: <a href="#">Brochure (944)</a> ▪ <a href="#">Brochure (940)</a> ▪ <a href="#">Video</a> <a href="#">Guide</a> ▪ <a href="#">Infographic</a> ▪ <a href="#">Take Action</a> ▪ <a href="#">Website</a> ▪ <a href="#">Facebook</a> <a href="#">Poster (941)</a> ▪ <a href="#">Pins (988)</a> ▪ <a href="#">Global Outlook</a> Advocacy: <a href="#">Flyer (943)</a> ▪ <a href="#">Global Outlook (703)</a> ▪ <a href="#">Webinar</a> Lighting: <a href="#">Guide</a> ▪ Media Center: <a href="#">Website</a> Endgame: <a href="#">Prezi</a> Digital Resources: <a href="#">USB drive (942)</a>		<i>This Close</i> : <a href="#">Video</a> ▪ <a href="#">Website</a> ▪ <a href="#">Advertisements</a> ▪ <a href="#">Gallery</a> <i>Conquering Polio</i> : <a href="#">CD (329)</a> ▪ <i>The Final Inch</i> : <a href="#">Video</a> <i>Shot Felt Around the World</i> : <a href="#">Video</a> PolioPlus: <a href="#">Global Outlook (322)</a> ▪ <a href="#">Fact Sheet</a> Global Eradication Initiative: <a href="#">Website</a> ▪ <a href="#">Requirements</a> ▪ <a href="#">Plan</a> Polio Survivors & Associates: <a href="#">RAG</a> ▪ <a href="#">Brochure</a>	
<b>Reports &amp; Manuals</b>			
Annual: <a href="#">Report (187)</a> ▪ <a href="#">Fact Card (159)</a> ▪ <a href="#">Operations Report</a> ▪ Endowment Fund: <a href="#">Report</a> ▪ Gift Acceptance Policy: <a href="#">Manual</a> Club President: <a href="#">Manual (222)</a> ▪ Club Rotary Foundation Committee: <a href="#">Manual (226E)</a> ▪ District Rotary Foundation Committee: <a href="#">Manual (300)</a> Rotary Foundation Seminar: <a href="#">Manual (438)</a> ▪ Grant Management: <a href="#">Manual</a> ▪ Code of Policies: <a href="#">Manual</a> Lead Your District: Committees: <a href="#">Manual (249)</a> ▪ Training: <a href="#">Manual (246)</a> ▪ Assistant Governor: <a href="#">Manual (244)</a> ▪ District Governor: <a href="#">Manual (233)</a>			

# ZONES 25 & 26 FOUNDATION TEAM ROTARIANS

## Zone 25 & 26 Website

<http://zone2526.org>

### Zone 25 Foundation Team Rotarians

<p><b>Regional Rotary Foundation Coordinator*</b> Wyn Spiller C 530-913-6470; H 530-265-3991 <a href="mailto:wyn.spiller@gmail.com">wyn.spiller@gmail.com</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> <b>Paul Harris Society*</b> Dick Elixman C 503-381-7002; W 503-597-5551 <a href="mailto:dick.elixman@bussysconsulting.com">dick.elixman@bussysconsulting.com</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5080, 5100 Robert M. Carroll C 509-292-2430; W 509-993-4176 <a href="mailto:rmpcarroll@aol.com">rmpcarroll@aol.com</a></p>
<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5020, 5030 Judith-Ann (Judy) Byron H 250-655-3672 <a href="mailto:jabyron@shaw.ca">jabyron@shaw.ca</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5110, 5180, 5190 Chuck Root H 541-535-7278; C 541-840-7777 <a href="mailto:chuckroot1112@gmail.com">chuckroot1112@gmail.com</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5150, 5160, 5130 Candy Pierce C 707-953-3735; W 707-434-0346 H 707-446-2903 <a href="mailto:candy4golf@aol.com">candy4golf@aol.com</a></p>
<p><b>End Polio Now Coordinator*</b> Dennis Wickham C 360-397-6226; H 360-576-0466 <a href="mailto:wickhamdj@comcast.net">wickhamdj@comcast.net</a></p>		<p><b>Endowment/Major Gift Adviser*</b> Jerry Hall C 775-329-5538; W 775-329-5538 H 775-323-7610 <a href="mailto:jhallreno@sbcglobal.net">jhallreno@sbcglobal.net</a></p>
<p><a href="#">Click here for Zone 25 Foundation Team Bios</a></p>		

### Zone 26 Foundation Team Rotarians

<p><b>Regional Rotary Foundation Coordinator*</b> Pam Russell H 619-723-3651 <a href="mailto:pdgpamo809@gmail.com">pdgpamo809@gmail.com</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> <b>Paul Harris Society*</b> Districts: 5000, 5170, 5220, 5230 Rosalynn "Roz" Cooper B 808-382-6340 <a href="mailto:cooperroo1@hawaii.rr.com">cooperroo1@hawaii.rr.com</a> <a href="mailto:rosalynn.d.cooperhannah.civ@mail.mil">rosalynn.d.cooperhannah.civ@mail.mil</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5240, 5280, 5300 Rick Mendoza H 310-544-4044; C 310-488-9349 <a href="mailto:rmendoza5280@cox.net">rmendoza5280@cox.net</a></p>
<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5320, 5330, 5340 Greg Owens H 562-985-0787 <a href="mailto:greg@trimodal.com">greg@trimodal.com</a></p>	<p><b>Asst. Regional Rotary Foundation Coordinator</b> Districts: 5490, 5500, 5510 Teree Bergman H 520-544-5987; C 520-395-6804 <a href="mailto:luvgoldens@me.com">luvgoldens@me.com</a></p>	<p><b>End Polio Now Coordinator*</b> Anil Garg H 805-583-0246; B 805-520-9790 <a href="mailto:anil.garg@lpl.com">anil.garg@lpl.com</a></p>
	<p><b>Endowment/Major Gift Adviser*</b> Brenda Cressey H 805-238-4264 <a href="mailto:rotarybrenda@gmail.com">rotarybrenda@gmail.com</a></p>	
<p><a href="#">Click here for Zone 26 Foundation Team Bios</a></p>		

\*serve all districts in their respective Zone

# WORLD HEADQUARTERS STAFF

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Answers Rotary Questions   Provides Reports	
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<b>Email:</b> <a href="mailto:contact.center@rotary.org">contact.center@rotary.org</a> <b>Fax:</b> 847-328-4101	
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<b>Reports</b>	<p>Donor History Report • Club Fundraising Analysis • Paul Harris Fellow Report</p> <p>Monthly Contribution Report • EREY Eligibility Report • Club Recognition Summary</p> <p>District Fundraising Profile • PolioPlus Report • Paul Harris Society Report • Banner Recognition Report</p>

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<b>Club &amp; District Support</b>				
Rotary Club Central   My Rotary				
Assists Districts in Zones 25 & 26 (except Districts 5020 & 5080)		Assists Districts 5020 & 5080*		
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<b>End Polio Now</b>	<b>PolioPlus</b>	<b>SHARE</b>	<b>Rotary Peace Centers</b>
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<b>Areas of Focus Managers</b>	<b>Rotary Alumni</b>	<b>Recognition</b>	
Available for consultation about project design, new initiatives and grants <a href="#">click here for listing</a>	Assists with program questions <a href="mailto:alumni@rotary.org">alumni@rotary.org</a>	Assists with Major Donor recognition <a href="mailto:majordonorcoord@rotary.org">majordonorcoord@rotary.org</a>	Assists with Benefactor & Bequest Society recognition <a href="mailto:bbs@rotary.org">bbs@rotary.org</a>

<b>Zone</b>	<b>District &amp; Global Grants</b>	<b>Major Giving</b>	<b>Planned Giving</b>	<b>Annual Giving</b>
	Handles Rotary grants; <a href="#">staff contact list</a>	Provides Major Donors & Bequest Society lists and provides options for major gifts	Handles <a href="#">Life Income Agreements</a> , <a href="#">Donor Advised Fund</a> and testamentary gifts	Promotes Every Rotarian Every Year, Rotary Direct, and Paul Harris Society
<b>25</b>	Renée Reiling Regional Grants Officer 847-866-3314 <a href="mailto:renee.reiling@rotary.org">renee.reiling@rotary.org</a>	Elizabeth Cruft-Anderson Major Gifts Officer 847-866-3074 or 503-744-0865 <a href="mailto:elizabeth.cruft-anderson@rotary.org">elizabeth.cruft-anderson@rotary.org</a>	Peter Doetschman Senior Planned Giving Officer 847-866-3833 <a href="mailto:peter.doetschman@rotary.org">peter.doetschman@rotary.org</a>	Steven Solomon Annual Giving Officer 847-866-3195 <a href="mailto:steven.solomon@rotary.org">steven.solomon@rotary.org</a>
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