
THE ROTARY FOUNDATION

2013-14 **Resource Guide** for Zones 25 & 26



The 2013-14 **Resource Guide** for Zones 25 & 26 supplements [The Rotary Foundation Reference Guide \(219\)](#) which is an official publication of Rotary International.

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

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Note: This is not an official Rotary International publication but a resource compiled by your Annual Giving Officer to assist with accessing various tools to help fundraise and promote The Rotary Foundation.

[The Rotary Foundation Reference Guide \(219\)](#) is a booklet that provides a brief overview of Rotary Foundation programs (including the Annual Fund and SHARE, Endowment Fund, PolioPlus Fund, Rotary Peace Fellowships, Grants, Rotary Foundation Alumni, Recognition and Foundation Awards)

STRATEGIES FOR INCREASING GIVING TO THE ROTARY FOUNDATION

Adopted from the "Global Leadership in Rotary" presentation by PDG John Jacob Gardiner



- ① **Setting high Foundation goals** at club & district levels.
Resources: ■ Rotary Club Central
Reports: ■ Club Fundraising Analysis ■ [Monthly Contribution Report](#)
- ② **Leading by example** --- personally giving at the highest level possible during first month. Encouraging your club & district leadership to do the same.
Resources: ■ [Ways to Give Brochure \(173\)](#) ■ [Every Rotarian, Every Year Brochure \(957\)](#)
Reports: ■ [EREY Eligibility Report](#) ■ [Club Recognition Summary](#) ■ [Donor History Report](#)
Forms: ■ [Contribution Form \(123\)](#) Rotary Direct: [Form \(USA\)](#) ■ [Form \(Canada\)](#) ■ [Guide](#)
- ③ **Celebrating Foundation Supporters**
Resources: ■ [Rotary Foundation Reference Guide \(219\)](#) ■ Your Rotary Legacy (330)
Staff: ■ Work with your Major Gifts & Planned Giving Officers and Zone Foundation Team
- ④ **Growing Paul Harris Society** (those donors giving US \$1,000 or more every year to the [Annual Fund](#), [PolioPlus Fund](#) or approved Foundation grant).
Resources: ■ [Paul Harris Society Brochure \(099\)](#)
Reports: ■ [EREY Eligibility Report](#) ■ Paul Harris Society Eligibility Report
Staff: ■ Work with your Annual Giving Officer and Zone Foundation Team
- ⑤ **Growing Major Donors** (donors whose outright giving has reached US \$10,000)
Resources ■ Major Gifts, Major Impact (166)
Reports: ■ Work with your Major Gifts Officer
- ⑥ **Using Rotary International Club Leadership Plan** to ensure that a club Foundation chair is in charge of encouraging giving to the Foundation.
Resources: ■ [Club Leadership Plan \(245\)](#) ■ [Club Rotary Foundation Committee Manual \(226\)](#)
- ⑦ **Creating Private Sector Committee** at the district level to identify and cultivate major individual and corporate givers to the Foundation.
Resources: ■ Corporate Matching Gifts: [Website](#) ■ Areas of Focus: [Guide](#) | [Website](#)
■ [Doing Good in the World DVD \(978\)](#)
Staff: ■ Work with your Major Gifts & Planned Giving Officers
- ⑧ **Gathering matching funds or points** to stimulate additional giving with 1:2 or 1:3 matches of gifts to the Foundation.
Resources: ■ [Understanding Foundation Recognition Points](#)
Forms: ■ [PHF Recognition and Transfer Request Form \(102\)](#)
- ⑨ **Sharing a Foundation Minute** at every club meeting every week across the district.
Resources: ■ [Rotary YouTube Videos](#) ■ [Rotary Vimeo Videos](#)
■ [Rotary Foundation Reference Guide \(219\)](#) ■ [Doing Good in the World DVD \(978\)](#)
- ⑩ **Giving club, district, zone, and Foundation awards** to individuals, clubs & districts who lead in per capita giving.
Resources: ■ [Rotary Foundation Reference Guide \(219\)](#)
Reports: ■ [EREY Eligibility Report](#) ■ [Club Recognition Summary](#) ■ [Donor History Report](#)
Staff: ■ Work with your Annual Giving, Major Gifts & Planned Giving Officers

THE ROTARY FOUNDATION

Member Access



Creating an account with Rotary's [Member Access](#) allows you to access online services and features. To ensure your personal information remains confidential, our online service requires you to log in to our secure environment with a unique email address and password. Through Member Access, you can view your **Donor History Report** which includes your personal contribution history and recognition summary.

Web Links

[Signing in](#)

[Frequently asked questions](#)

[Creating an account & logging in](#)

[Contribution and Recognition Reports User Guide](#)

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

| Member Access | All Rotarians | Club | | | | District | | | |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | | President | Secretary & Executive Secretary | Rotary Foundation Committee Chair | Treasurer | DG/AG | DGE | DRFC chair | DFSC chair |
| Contribute | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View your contribution history | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rotary Club Central | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rotary Club Central : enter goals | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rotary Showcase | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View Club Recognition Summary (for your own club) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View Club Recognition Summary (for other clubs in the district) | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View Monthly Contribution Report , SHARE , and polio reports | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View EREY Eligibility Report | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <p>Note: Club treasurers and club Foundation chairs gain access after the current President, Secretary and/or Executive Secretary add them through their Member Access by "Updating Club Data."</p> | | | | | | | | | |
| <p>ACRONYMS: DG District Governor AG Assistant Governor DGE District Governor-Elect DRFC District Rotary Foundation committee chair DFSC District Fundraising subcommittee chair</p> | | | | | | | | | |
| Contact Center handles Member Access Questions | | | | | | | | | |
| <p>Telephone: +1-866-9ROTARY (+1-866-976-8279) Email: contact.center@rotary.org</p> | | | | | | | | | |
| Club & District Support handles Rotary Club Central Questions | | | | | | | | | |
| James Damato (Sr. Supervisor) +1-847-866-3405 Victoria Schiffman (Coordinator) +1-847-866-3354 | | | | | Chris Brown (Sr. Coordinator) +1-847-866-3271 Susan Schmidt (Coordinator) +1-847-866-3269 Julie Aubry (Coordinator) +1-847-866-3429 | | | | |
| Assist all districts in Zones 25 & 26 except Districts 5020 & 5080 | | | | | Assist Districts 5020 & 5080 | | | | |
| To find your representative: www.rotary.org/cds | | | | | | | | | |

ROTARY DIRECT

Frequently Asked Questions



What is Rotary Direct?

[Rotary Direct](#) (formerly known as TRF-Direct) is The Rotary Foundation's recurring giving program. Select an amount, frequency (monthly, quarterly or annually), and contribution method. You can set up recurring gifts to the Annual Fund, PolioPlus and the Areas of Focus. You can learn more from the [Rotary Direct Information Guide](#).

Why sign up for Rotary Direct?

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, as well as your club recognition banners.

How do you sign up?

- (1) **Web:** Once registered in [Member Access](#), Rotarians can contribute at www.rotary.org/contribute. The recurring option is presented in Step 2 of the contribution process under the section titled "Frequency."
- (2) **Handout:** Donors may enroll using the [Rotary Direct \(USA\)](#) or [Rotary Direct \(Canada\)](#)
- (3) **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."
- (4) **Phone:** Donors may enroll over the phone with the Contact Center by calling +1-866-976-8279 or +1-866-9ROTARY.

What are the frequency options available for Rotary Direct gifts?

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.

Can I enroll using a checking account (direct debit) arrangement?

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

How do I change my method of payment, amount or stop Rotary Direct contributions?

To make changes to your account, please call +1-847-866-3066 or email rotarydirect@rotary.org. For security reasons, please notify us by telephone to change or update your credit card information.

Where can I get a list of Rotary Direct participants for my district?

The Rotary Foundation is in the process of adding a notation on the EREY Eligibility Report and Club Recognition Summary so you can identify the Rotary Direct participants in your club. Please note that these reports do not include contribution amounts due to Rotary's confidentiality and privacy policies.

PAUL HARRIS SOCIETY

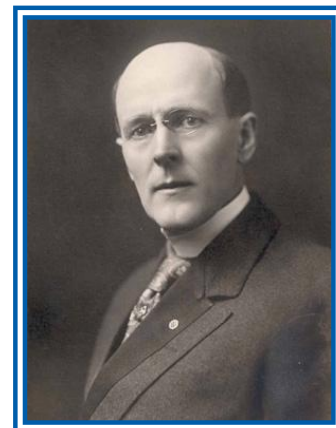


1. What is the Paul Harris Society?

The [Paul Harris Society](#) is a recognition program for Rotarians and friends of [The Rotary Foundation](#) who personally contribute US \$1,000 or more to the [Annual Fund](#), [PolioPlus Fund](#) or an approved Foundation grant each year. Contributions to the [Endowment Fund](#)) and [Disaster Recovery Funds](#) are not eligible for Paul Harris Society membership.

View the [Paul Harris Society Brochure \(099\)](#)

View the [Paul Harris Society Best Practices Webinar](#)



2. What do your contributions support?

Your contributions support a wide range of [humanitarian](#) and [educational](#) activities [around the world](#).

3. What is the recent Trustee decision about Paul Harris Society?

The Trustees of The Rotary Foundation have adopted the Paul Harris Society as an official recognition program of The Rotary Foundation effective 1 July 2013. **The Rotary Foundation will begin providing consistent recognition material, reporting, tracking while increasing marketing and district support for the Paul Harris Society program.** The administration and operations plans are still being developed.

4. How do you get help from the Foundation to track Paul Harris Society eligibility?

(a) The Contact Center (contact.center@rotary.org) provides the following reports:

- (i) The [EREY Eligibility Report](#) is a **club tool** to identify potential members that lists PHS eligibility for the current and previous Rotary years.
- (ii) The **donor history report** provides **individual donors** with their own Paul Harris Society eligibility for the current and previous Rotary year. You can use the [Contribution and Recognition Reports User Guide](#) for assistance in running this report in [Member Access](#).
- (iii) The **Paul Harris Society Eligibility Report** is a **district tool** to identify potential members that lists Paul Harris Society eligibility for the current and previous two Rotary years.
- (iv) The **Recognition Report by Individual (Paul Harris Society Eligibility)** is a **district tool** that lists potential members and the date they achieved their last PHS eligibility. There are two additional tabs with this excel report that includes mailing address information (which can be used for mail merges).



5. Who provides the recognition items for Paul Harris Society members?

The 2013-14 Paul Harris Society recognition will be provided by The Rotary Foundation. The administration and operations plans are still being developed.

6. Can I set up automatic giving to The Rotary Foundation to fulfill my Paul Harris Society membership?

Through [Rotary Direct](#), Rotary's recurring giving program, you can set up automatic contributions through your credit card or direct debit card online. Sign up through [Member Access](#), by completing the Rotary Direct Handout [USA](#) [Canada](#) or over the phone with the Contact Center by calling +1-866-976-8279 or +1-866-9ROTARY.

THE ROTARY FOUNDATION

Individual Recognition Opportunities



The Rotary Foundation welcomes a number of opportunities to show its appreciation to individuals for supporting its grants and programs. Through [Member Access](#), you can view your **Donor History Report** which includes your personal contribution history and recognition summary. Use the [Contribution and Recognition Reports User Guide](#) for assistance in running this report through [Member Access](#). To request a copy of this report from the Foundation, e-mail contact.center@rotary.org.

ROTARY FOUNDATION SUSTAINING MEMBER

A Rotary Foundation Sustaining Member is an individual who personally contributes US\$100 or more each 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 in appreciation of this achievement. Use the [EREY Eligibility Report](#) to see the Rotary Foundation Sustaining Members in your club.



PAUL HARRIS FELLOW

Paul Harris Fellow recognition is given in appreciation to anyone who contributes (or in whose name is contributed), a gift of US\$1,000 or more cumulatively to the Annual Fund, PolioPlus Fund, or an approved Foundation 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 the list of Paul Harris Fellows in your club.



CERTIFICATE OF APPRECIATION

Occasionally, a donor contributes US\$1,000 and wishes to recognize a business or organization. In these instances, a Certificate of Appreciation is given instead of Paul Harris Fellow recognition, which is only for individuals.



MULTIPLE PAUL HARRIS FELLOW

Multiple Paul Harris Fellow recognition is extended at subsequent US \$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 the list of multiple Paul Harris Fellows in your club.

US\$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 year to the Annual Fund, PolioPlus Fund, or an approved Foundation 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. Use the [EREY Eligibility Report](#) to see the eligible Paul Harris Society members in your club.



THE ROTARY FOUNDATION

Individual Recognition Opportunities



MAJOR DONOR

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. **Contact your Major Gifts Officer to request a list of the Major Donors in your district.**

US\$ 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



ARCH C. KLUMPH SOCIETY

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. **Contact your Major Gifts Officer to request a list of Arch C. Klumph Society members in your district.**

Trustees Circle
 US\$ 250,000 to 499,999.99

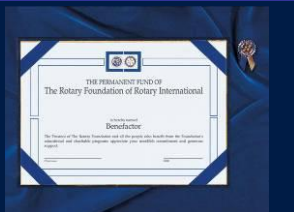
Chair's Circle
 500,000 to 999,999.99

Foundation Circle
 1,000,000 and above



BENEFACTOR

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. **Use the Club Recognition Summary to see the Benefactors in your club.**



BEQUEST SOCIETY

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. **Contact your Major Gifts Officer to request a list of Bequest Society members in your district.**

US\$ 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



THE ROTARY FOUNDATION

Club Banner Recognition Opportunities



To request a copy of the **Annual Fund Banner Recognition Status Report** from the Foundation, e-mail contact.center@rotary.org. 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.

EVERY ROTARIAN, EVERY YEAR CLUB

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. Use [EREY Eligibility Report](#) to determine if your club will qualify for this recognition.



100% PAUL HARRIS FELLOW CLUB

To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time banner recognition is requested*. In addition to the banner, the club's name is included on the [list of 100% Paul Harris Fellow Clubs](#) available at www.rotary.org. This one-time only banner recognition is awarded throughout the Rotary year. Use [Club Recognition Summary \(CRS\)](#) to determine if your club will qualify for this recognition.

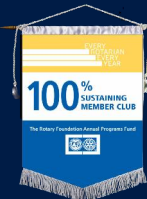


*To obtain this recognition:

1. A club representative must contact the district governor after determining that all current, dues-paying club members are Paul Harris Fellows
2. The district governor must confirm that all members are Paul Harris Fellows and notify The Rotary Foundation by emailing APF@rotary.org

100% ROTARY FOUNDATION SUSTAINING MEMBER CLUB

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. Use [EREY Eligibility Report](#) to determine if your club will qualify for this recognition.



TOP THREE PER CAPITA IN ANNUAL FUND GIVING

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. Use the [Annual Fund Banner Recognition Status Report](#) to determine if your club will qualify for this recognition.



UNDERSTANDING FOUNDATION RECOGNITION POINTS



What are Foundation recognition points and how are they accumulated?

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the [Annual Fund](#) or [PolioPlus Fund](#), or as a sponsor portion to a Foundation 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's death, or until the donor uses the points (the surviving spouse of a Major Donor may also use the points).

How do you transfer Foundation recognition points?

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](#).

- Individual donors are the only ones authorized to transfer Foundation recognition points from their individual account.
- Club presidents are the only ones authorized to transfer Foundation recognition points from the club's account.
- District governors are the only ones authorized to transfer Foundation recognition points from the district account.

Foundation recognition points may not be transferred from individuals to a club or district.

Can Foundation recognition points of deceased Rotarians be transferred?

No. Foundation recognition points of deceased Rotarians expire unless the deceased is a [Major Donor](#), in which case, the spouse/partner maintains control of the Foundation recognition points during their lifetime.

Can a business or organization become a Paul Harris Fellow?

No. Paul Harris Fellow awards are issued only to individuals. However, businesses and organizations can be recognized for contributions of US\$1,000 or more with a Certificate of Appreciation.

Can someone deceased become a Paul Harris Fellow?

Yes. A donor can recognize a deceased individual by requesting a [Memorial Paul Harris Fellow](#).

Do Foundation recognition points count toward Major Donor recognition?

No. Only cumulative personal outright contributions count toward [Major Donor recognition](#).

What report tracks Foundation recognition points?

Through [Member Access](#), your club and district leadership can view the [Club Recognition Summary](#), which provides the recognition amount, Foundation recognition points, current Paul Harris Fellow level, and date that Paul Harris Fellow level was achieved.

Through [Member Access](#), you can view your personal contribution history, recognition amount, and available Foundation recognition points. You can request a copy of your **Donor History Report** from the Foundation at contact.center@rotary.org.

On the Club Recognition Summary, what is the difference between recognition amount and available Foundation recognition points?

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).

Available Foundation recognition points 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.

Can clubs or districts accumulate Foundation recognition points?

Yes. Clubs can view recognition points in the [Club Recognition Summary](#).

District Foundation recognition points are shown in the **Donor History Report**. Districts may request the report at contact.center@rotary.org.




How can I use Foundation recognition points to increase giving to the Foundation?

Matching outright contributions with Foundation recognition points may help your club reach or even surpass its Annual Fund goal, as well as achieve 100% Paul Harris Fellow recognition.

To determine whether your club is close to achieving 100% Paul Harris Fellow status, review the recognition amounts of all active Rotarians in the [Club Recognition Summary](#) who are currently listed as active club members.

To determine whether you’re close to achieving your Annual Fund goal, review the [Monthly Contribution Report](#).

What recognition opportunities are available with Foundation recognition points?

| | |
|--|---|
| <p>Paul Harris Fellow Paul Harris Fellow recognition is given in appreciation to anyone who contributes, outright or cumulatively (or in whose name is contributed), a gift of US\$1,000 or more to the Annual Fund, PolioPlus Fund, or the World Fund, or as a sponsor portion of a Foundation grant. The recognition consists of a certificate and pin. In addition, Paul Harris Fellow medallions can be ordered at shop.rotary.org for \$15 each. Use the Club Recognition Summary to see a listing of the Paul Harris Fellows in your club.</p> |  |
| <p>Certificate of Appreciation Occasionally, a donor contributes US\$1,000 and wishes to recognize a business or organization. In these instances, since Paul Harris Fellow recognition can only be presented to individuals, a Certificate of Appreciation is given instead.</p> |  |
| <p>Multiple Paul Harris Fellow Multiple Paul Harris Fellow recognition is extended at subsequent US\$1,000 levels (\$2,000, \$3,000, and so on). Recognition consists of a pin with stones corresponding to the recipient’s recognition amount level. Use the Club Recognition Summary to see a list of Multiple Paul Harris Fellows in your club.</p> |  |

THE ROTARY FOUNDATION

Reports Available



| Report | Information Available | Run | Format | Location |
|---|--|------------------|--------------|---------------------------------|
| Donor History Report | Recognition type including Major Donor or AKS, Bequest Society, Benefactor, Paul Harris Fellow Recognition amount and Foundation recognition points available for transfer EREY, RFSM and PHS Eligibility date achieved for current & previous Rotary years Outright gifts by designation subtotal and total giving Bequest Society and Benefactor commitments Detailed contribution and Foundation recognition point transfer activity *use to reconcile any issues with contributions or recognition for individuals | individual | PDF | Member Access Contact Center |
| EREY Eligibility Report | EREY, RFSM and PHS Eligibility date achieved for current & previous Rotary years Rotary Direct participants count of EREY, RFSM, PHS Eligibility and Rotary Direct donors | club district | PDF Excel | Member Access Contact Center |
| Club Fundraising Analysis Report | Annual Fund goal, Annual Fund contribution, Annual Fund per capita and total contributions for 5 Rotary years EREY, RFSM and PHS Eligible members count by club for 5 Rotary years *use to set goals | district | PDF Excel | Contact Center |
| Club Recognition Summary | Club member's Recognition Amount, Foundation recognition points available to transfer, current Paul Harris Fellow level & date achieved and indicates 100% Paul Harris Fellow Club and the date this was achieved Rotary Direct participants Benefactors Last contribution date & designation Club's all-time giving to the Foundation *use to identify current and new Paul Harris Society members | club district | PDF Excel | Member Access Contact Center |
| Monthly Contribution Report | Contribution history by club for Annual Fund, Other Funds (Foundation grants & PolioPlus) & Endowment Fund Annual Fund per capita *use to identify non-contributing clubs | district | PDF Excel | Member Access Contact Center |
| District Fundraising Profile | Annual Fund goal, percent goals received, Annual Fund contribution, Annual Fund per capita, Endowment Fund, total contributions, percent RFSM, and number of non-contributing clubs for 8 Rotary years Cumulative number of benefactors, Bequest Society members, and Major Donors each year for 8 Rotary years Number of major gifts and PHS eligible members per year for 8 Rotary years Number of total endowed funds and their market value | district | PDF Excel | Contact Center |

THE ROTARY FOUNDATION

Reports Available









| Report | Information Available | Run | Format | Location |
|--|--|--------------------------|--------------|-----------------------|
| Paul Harris Society Eligibility Report | PHS Eligible by individual in a district for current & 2 prior Rotary years *use to identify current and new Paul Harris Society members | district | Excel PDF | Contact Center |
| Recognition Report by Individual | Select Recognition type-Benefactor, Certificate of Appreciation, EREY Eligible, Paul Harris Fellow, Paul Harris Society Eligible, Sustaining Member Eligible Individual and date achieved last recognition type Report includes two additional tabs with mailing address information *use excel version for mail merge for invitations | club district zone | Excel PDF | Contact Center |
| Recognition (BS/MD/AKS) Report | Select Recognition type-Bequest Society, Major Donor, Arch C. Klumph Society Individual and date achieved last recognition type Report includes two additional tabs with mailing address information *use excel version for mail merge for invitations | club district zone | PDF Excel | Major Gifts Officer |
| Rotary Direct Report | Individuals by club who are signed up for Rotary Direct includes frequency and contribution designation | district | PDF | Annual Giving Officer |
| Every Rotarian Every Year Annual Fund Report | District membership, Annual Fund total, Annual Fund per capita, number of clubs with goals, percentage of clubs with goals, district goal, sustaining member, PHS Eligible, non-giving clubs, and total giving year to date | zone | PDF Excel | Contact Center |
| Annual Fund Banner Recognition Status Report | Displays a club's current Rotary year progress towards becoming an Every Rotarian, Every Year Club (EREY), a 100% Rotary Foundation Sustaining Member Club and the Top Three Per Capita in Annual Fund Giving banner recognition *lists the percentage of participation by club for EREY and Sustaining Membership 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. | district | PDF Excel | Contact Center |
| Regional Contribution Summary | Data on giving by geographic region to the Annual Fund, PolioPlus Fund, Endowment Fund & Related, Other Giving and total contributions for current and previous Rotary year with the percentage change between the two years | world | PDF | Contact Center |
| Top 30 Giving Countries | Data on top 30 countries including their giving to Annual Fund, Other Giving and Endowment Fund for a Rotary year Number of Rotarians, percent of all Rotarians, number of clubs, percent of all clubs | world | PDF | Contact Center |

THE ROTARY FOUNDATION

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](#) or through Publications Order Services (see page 15 for contact information).

| Ways to Give | | Forms: Contribution & Recognition |
|---|--|--|
| Ways to Give: Brochure (173) ① Annual Fund ② Areas of Focus Funds ③ PolioPlus Fund | ④ Endowment Fund ▪ Rotary Peace Centers ⑤ Foundation Grants Corporate Matching: Website | Rotary Direct: Form (USA) ▪ Guide ▪ Form (Canada) Contribution (123): Form ▪ Multiple Donor (094): Form Memorial & Tribute: Form ▪ Recognition Replacement: Form PHF Recognition and Transfer Request (102): Form |
| Annual Giving: Every Rotarian Every Year | | Planned & Major Giving |
| Annual Fund: Website ▪ Brochure (957) ▪ Newsletter ▪ Poster (959) Rotary Foundation Reference: Guide (219) Doing Good in the World: Video ▪ DVD (978) Paul Harris Society: Brochure (099) ▪ Webinar Club Talk: Presentation ▪ Foundation Funding: e-Learning Understanding Foundation Recognition Points: Handout Sustaining Member: Badge Stickers (956) | Planned Giving: Website ▪ Brochure (330) ▪ Newsletter Legacy Gifts Q&A: USA ▪ Canada ▪ Presentation Life Income Gifts: Brochure (109) Donor Advised Fund: Quick Guide (382) Arch C. Klumph Society: Brochure (308) Gift Acceptance Policy: Manual Major Gifts: Brochure (166) ▪ Endowment Fund: Report | |
| Rotary Peace Centers | | Finance & Investments |
| Rotary Peace Centers: Website ▪ Newsletter ▪ Facebook ▪ Leaflet (084) Voices for Peace: Video ▪ Practicing Peace: Video Gifts to Peace Centers: Peace is Possible (850) ▪ Website ▪ Pins (089) Program Guide for Rotarians: Guide (085) ▪ Press Release: Word Application: Word (083) ▪ PDF (083) ▪ How to apply Fellow Handbook: Master's Degree (087) ▪ Certificate Program (106) Current & Past Students (Alumni): Website ▪ Pamphlet (092) | Finances: Website ▪ Admin: FAQ ▪ Governance: FAQ Investments: FAQ ▪ Report ▪ Returns ▪ Philosophy ▪ Equity Holdings | |
| | | Alumni |
| | | Alumni: Newsletter ▪ Facebook ▪ LinkedIn ▪ Website ▪ Cards Alumni Associations: How to Form ▪ FAQ Awards: Website ▪ District Grant Nomination: Form Rotary Program Participation: Survey ▪ Resources: Website |
| Areas of Focus | | Grants |
| Rotary Foundation Reference: Guide (219) Areas of Focus: Guide (965) ▪ e-Learning  Promote peace: Video ▪ e-Learning ▪ RAG  Fight disease: Video ▪ e-Learning ▪ RAGS  Provide clean water: Video ▪ e-Learning ▪ Global Outlook (701) ▪ RAG  Save mothers & children: Video ▪ e-Learning ▪ Global Outlook ▪ RAG  Support education: Video ▪ e-Learning ▪ Global Outlook ▪ RAG  Grow local economies: Video ▪ e-Learning ▪ RAG | Rotary grants: Global Outlook (710) ▪ Terms & Conditions Grant Management: Manual ▪ Choosing a Grant: e-Learning District Grants: Website ▪ Global Grants: Website Packaged Grants: Website Online Fair for Grants: District Website ▪ Global Website Vocational Training Teams: e-Learning ▪ Facts Scholarships: e-Learning ▪ Flier (132) ▪ Fact Sheet Sustainability: e-Learning ▪ Global Outlook (700) ▪ Video | |
| End Polio Now | | |
| End Polio Now: Brochure (940) ▪ Advocacy Flyer (943) ▪ Video ▪ Resources ▪ Newsletter ▪ Website ▪ Facebook ▪ Poster (941) ▪ Pins (988) T-shirt ▪ <i>Conquering Polio</i> : CD (329) ▪ <i>Shot Felt Around the World</i> : Video ▪ <i>The Final Inch</i> : Video Jump Drive Video & Digital Resources (942) ▪ Fundraising Toolkit: DVD (999) ▪ Lighting: Website ▪ Guide This Close: Video ▪ Website ▪ Advertisements ▪ Gallery ▪ Media Center: Website Public Relations: Fact Sheet PolioPlus: Website ▪ Fact Sheet ▪ Timeline ▪ The "Plus" in PolioPlus: Brochure (322) ▪ Global Outlook Global Eradication Initiative: Website ▪ Requirements ▪ Polio Survivors & Associates (Rotary Action Group): Website ▪ Brochure | | |
| Reports & Manuals | | |
| Annual: Report (187) ▪ Fact Card (159) ▪ Endowment Fund: Report ▪ Club Rotary Foundation Committee: Manual (226E) District Rotary Foundation Committee: Manual (300) ▪ The Rotary Foundation Seminar: Manual (438) ▪ Grant Management: Manual | | |

THE ROTARY FOUNDATION

2013-14 Zone Foundation Team Rotarians



Zone 25 Foundation Team

| | | |
|--|---|---|
| <p>New Grant Model Resource Person Districts: 5020, 5080, 5100, 5110 Brian Beagle H +1-360-697-2783 d5020governor0809@gmail.com</p> | <p>Regional Rotary Foundation Coordinator* Joan Firkins H +1-778-426-1842 jfirkins@shaw.ca</p> | <p>New Grant Model Resource Person Districts: 5130, 5150, 5180, 5190 Candy Pierce H +1-707-446-2903 candy4golf@aol.com</p> |
| <p>Assistant Regional Rotary Foundation Coordinator Districts: 5020, 5030 Don Gregory H +1-206-772-4829; C +1-206-915-8116 dg0708@rotary5030.org dongregory315@gmail.com</p> | <p>End Polio Now Coordinator* Brian Moore H +1-916-489-4543; C +1-916-718-8185 rotarypdg5180@unlimited.net</p> | <p>Assistant Regional Rotary Foundation Coordinator Districts: 5080, 5100 Sandy Wade C +1-509-939-1544 dutchtreat1@comcast.net</p> |
| <p>Assistant Regional Rotary Foundation Coordinator Districts: 5110, 5180, 5190 Chuck Root H +1-541-535-7278 C +1-541-840-7777 dg1112@district5110.org</p> | <p>Assistant Regional Rotary Foundation Coordinator Paul Harris Society* Dick Elixman W +1-503-597-5551; C +1-503-381-7002 rdelixman@gmail.com</p> | <p>Assistant Regional Rotary Foundation Coordinator Districts: 5150, 5160, 5130 Candy Pierce C +1-707-953-3735; W +1-707-434-0346 candy4golf@aol.com</p> |

Zone 26 Foundation Team

| | | |
|---|---|--|
| | <p>Regional Rotary Foundation Coordinator* Pam Russell C +1-619-723-3651 pdgpam0809@gmail.com</p> | |
| <p>Assistant Regional Rotary Foundation Coordinator Districts: 5000, 5170, 5220, 5230 Carolyn Schuetz W +1-510-769-9661 csandlb@comcast.net</p> | <p>Assistant Regional Rotary Foundation Coordinator Districts: 5320, 5330, 5340 Johrita Solari W: +1-714-282-2520 ext. 209 C +1-714-296-4462 johrita-rotary@solari-ent.com</p> | <p>Assistant Regional Rotary Foundation Coordinator Districts: 5240, 5280, 5300 Rick Mendoza C +1-310-488-9349; H +1-310-544-4044 rmendoza5280@cox.net</p> |
| <p>Assistant Regional Rotary Foundation Coordinator Districts: 5490, 5500, 5510 Charlie Tegarden C +1-928-715-1001 charlie@tegarden.com</p> | <p>End Polio Now Coordinator Districts: 5000, 5170, 5220, 5230, 5240, 5280, 5320, 5300, 5330, 5340 Brad Howard W +1-510-834-2260; H +1-510-333-8144 bhoward@howardtours.net</p> | <p>End Polio Now Coordinator Districts: 5490, 5500, 5510 Barbara Feder W +1-480-839-5847; H +1-480-839-5320 C +1-602-622-7280 barbfeder@gmail.com</p> |
| <p>EREFY Coordinator* Helene Kalfuss H +1-760-327-7686 drhkalfuss@dc.rr.com</p> | <p>Paul Harris Society Coordinator* Rosalyn "Roz" Cooper W +1-808-438-7102; H +1-808-599-5459 C +1-808-382-6340 cooperr001@hawaii.rr.com</p> | <p>Million Dollar Dinner Coordinator* Barbara Feder W +1-480-839-5847; H +1-480-839-5320 C +1-602-622-7280 barbfeder@gmail.com</p> |

*serve all districts in their respective Zone

THE ROTARY FOUNDATION

Rotary World Headquarters Staff



| Contact Center | |
|---|--|
| Answers Foundation Questions Provides Foundation Reports | |
| Telephone: +1-866-9ROTARY (+1-866-976-8279) Email: contact.center@rotary.org Fax: +1-847-328-4101 Hours: Monday through Friday from 8 a.m. to 5 p.m. Central Standard Time | |
| Questions | Member Access ▪ Foundation recognition points ▪ recognition items all Paul Harris Fellow issues ▪ donations & refunds ▪ corrections & redistributions enroll in Rotary Direct or make credit card contributions over the phone |
| Reports | Donor History Report ▪ Club Fundraising Analysis ▪ Paul Harris Fellow Report Monthly Contribution Report ▪ EREY Eligibility Report ▪ Club Recognition Summary PolioPlus Reports ▪ Paul Harris Society Eligibility Report ▪ Banner Recognition Report |
| Publication Order Services | |
| Multimedia Publications Supplies | |
| Web: http://shop.rotary.org Publications: RI Catalog (019) Telephone: +1-847-866-4600 Fax: +1-847-866-3276 Email: shop.rotary@rotary.org Hours: Monday through Friday from 8:30 a.m. to 5 p.m. Central Standard Time | |

Gift Officers

| | Annual Giving | Major Giving | Planned Giving |
|----------------|--|---|--|
| Service | ▪Works with major gift prospects giving US \$10,000 | ▪Provides lists of Major Donors and Bequest Society members; works with major gift prospects giving US \$50,000+ | ▪Promotes Life Income Agreements , Donor Advised Fund and testamentary gifts |
| Zone 25 | Steven Solomon Annual Giving Officer +1-847-866-3195 steven.solomon@rotary.org | Elizabeth Cruft-Anderson Major Gifts Officer +1-847-866-3074 or +1-503-744-0865 elizabeth.cruft-anderson@rotary.org | Peter Doetschman Senior Planned Giving Officer +1-847-866-3833 peter.doetschman@rotary.org |
| Zone 26 | Steven Solomon Annual Giving Officer +1-847-866-3195 steven.solomon@rotary.org | Michael Dunlap Major Gifts Officer +1-760-715-9984 or +1-847-859-7541 michael.dunlap@rotary.org | Karena Bierman, J.D. Manager of Gift Planning +1-847-866-4458 karena.bierman@rotary.org |

| Rotary Direct: recurring giving program | SHARE: District Designated Funds | PolioPlus |
|--|--|--|
| ▪To modify existing Rotary Direct contributions call +1-847-866-3066 or email rotarydirect@rotary.org | ▪ District Designated Funds questions email share.mailbox@rotary.org | ▪ PolioPlus questions email polioplus@rotary.org |

Recognition

| Paul Harris Fellow | Paul Harris Society | Bequest Society & Major Donor |
|--|--|--|
| ▪Contact Center (see above) handles all Paul Harris Fellow inquiries | ▪your district's Paul Harris Society Coordinator provides the pin and maintains membership lists | ▪Major Gifts Officers provide lists of Benefactor, Bequest Society and Major Donors (see below) ▪Recognition questions email bbs@rotary.org |