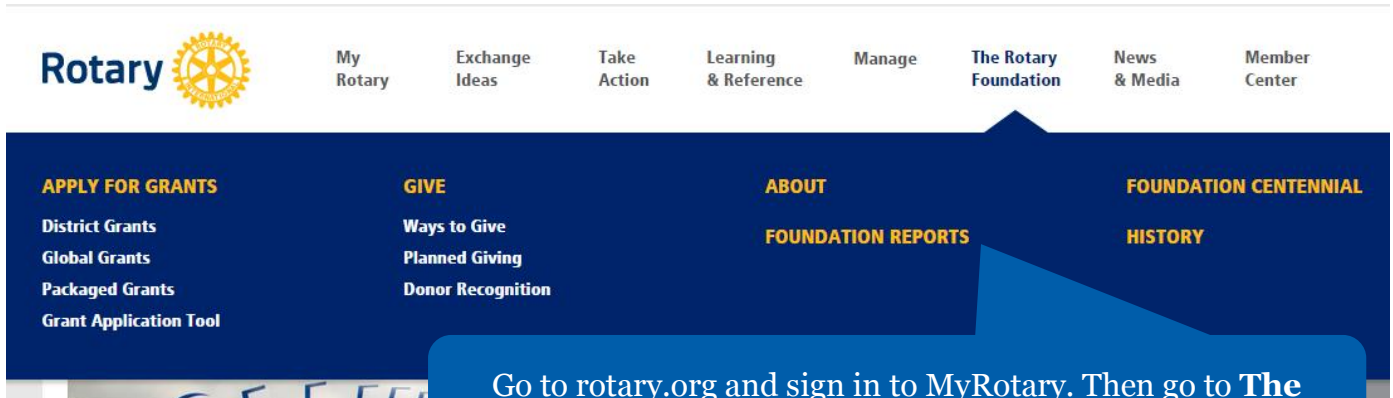# USING THE PAUL HARRIS SOCIETY REPORT

The Rotary Foundation

All district and club leaders have access to the Paul Harris Society Report through My Rotary:

Rotary

| My Rotary | Exchange Ideas | Take Action | Learning & Reference | Manage | The Rotary Foundation | News & Media | Member Center |

APPLY FOR GRANTS
District Grants
Global Grants
Packaged Grants
Grant Application Tool

GIVE
Ways to Give
Planned Giving
Donor Recognition

ABOUT

FOUNDATION REPORTS

FOUNDATION CENTENNIAL

HISTORY

> Go to rotary.org and sign in to MyRotary. Then go to **The Rotary Foundation**, then **Foundation Reports.**

REPORTS

⊘ PAGE GUIDE

CLUB REPORTS

Membership

☆ **Member Recognition by Club**
Sponsor Status, New Member Sponsor
View reports | About the program

Contributions & Recognition

☆ SHARE
Annual Fund-SHARE contrib... each club in a district, source of District Designa...
View report

> If you are a club leader, under **Club Reports** find **Contributions & Recognition**, find **Club Giving**, and chose **View Reports.**

DISTRICT REPORTS

Contributions & Recognition

☆ **Club Giving**
Benefactor Report, Club Recognition Summary, EREY R...
Bequest Society Report, Club Fundraising ... y Report, Curr...
Giving Report, Incoming Off... ...port
View reports

> If you are a district leader, under **District Reports** find **Contributions & Recognition**, find **Club Giving**, and chose **View Reports.**

> Under **Club Reports**, choose **Paul Harris Society Report**

Tab 1: Paul Harris Society

1 — The number of society members in the club, district, or zone — that is, the number of donors who have expressed their intent to join the Paul Harris Society

2 — Basic information for each donor, including Rotary ID and club name

3 — A **Y** indicates that the person is registered as a Paul Harris Society member

4 — A **Y** indicates that the donor makes recurring contributions through Rotary Direct. This does not automatically make the donor a society member, even if the recurring gifts total $1,000 per year. Donors must register for society membership.

5 — The **PHS Eligible** columns give the date when the donor reached $1,000 in contributions for the indicated Rotary year. Consider using the information in these columns to:
- Thank any donors who have contributed at least $1,000 this Rotary year
- Remind society members who have not yet reached $1,000 in giving this Rotary year
- Identify donors who are already giving $1,000 or more yearly and consider inviting them to join the Paul Harris Society

Contacting Members and Identifying New Members

At the bottom of the report, you will see a tab labeled **PHS Member Detail**. It's similar to the Paul Harris Society tab but includes a PHS Join Date column to allow you to identify new members.

To identify new members:
1. Export the data to an Excel file as shown here:

2. Open the Excel spreadsheet. If asked, use the **Enable Editing** button to proceed.

3. With the Home tab active, click or tap **Sort & Filter**; choose **Filter** from the drop-down menu to make sorting buttons appear at the tops of the columns, as shown below.

4. Use the drop-down button in the **PHS Join Date** column.

5. In the **Search** box:

   a. Type a three-letter month abbreviation to search for members who joined during that month, or

   b. Type a year to find members who joined that year

6. Choose **OK**.

Paul Harris Society coordinators are encouraged to familiarize themselves with this report, check it periodically to welcome new members, and make sure each new member is presented a Paul Harris Society chevron at an appropriate occasion. This tab of the report also lists each donor's club number and contact information. You can use the information to perform email and mail merges to send thank-you letters, email reminders, invitations to recognition events, and so on.