Well, it’s a new Rotary year and what a year we just finished. Thanks to the work of last year’s TRF team headed up by PDG Russ Hobbs, and the leadership of District Governor Ramesh Hariharan, we set records in every Rotary Foundation key metric as follows:

$7,423,286 - Total Giving. Number one in the world among over 530 Districts.
$828,716 - Annual giving. A district record and important as it drives the DDF coming back to the District in the future.
$767,190 - Polio Plus. Thanks to some very generous Arch Klumph Society members.
$5,699,278 - Endowment Fund. Thanks to two major bequests that were activated last year.

While these achievements set some very high bars to reach this coming year, we have a strong set of existing and new TRF team members, eager to build on this success and do even more next year. Here are a few of the initiatives that we are planning for this upcoming year.

- Focus on EREY (Every Rotarian, Every Year). It only takes a $25 contribution to qualify, yet only about half of our members achieve it.
- Rotary Direct- “Fill it, Sign it, Send it, and Forget it!” The easy way to make your contribution.
- GEPP (Gift and Estate Planning Professionals). A program to increase TRF donations via the District’s estate planning professionals. Over $4M of the Endowment Fund dollars listed above came to us through this type of resource.

Of course all our normal tools, workshops, and other resources will be available to help the Clubs meet or achieve their TRF goals.
My personal thanks to the dedicated and hardworking TRF Team for the outstanding year we had in 2019-20, (PDG Tim Lundell, PDG Joe Hamilton, PDG Ed Jellen, PDG Jeff Orth, PDG Arley Marley, DGE Richard Flanders, Jim Bell, Jon Winston, Phil Dean, Pat McMenamin, Noe Lozano, Robyn Young, Geeta Kadambi, Carey Lai, Heather Shaw, Katia Gomez), and last but my no means least TRF Chair PDG Russ Hobbs.

A Message from District Governor
Gregg Giusiana

As we begin our new year, I want to thank all the Rotarians who donated to the Foundation last year and in all the years past. The Rotary Foundation is the heart of what makes Rotary so important to the world. The seven areas of focus ensure the grants go to meaningful projects that help people in all parts of the world every day. And because each grant must be able to show sustainability, they help people today, tomorrow, and well into the future.

For the past three years, the foundation committee chair has been PDG Russ Hobbs from the Rotary Club of Santa Cruz. He has done an incredible job. He and his team started area-by-area presentations on The Rotary Foundation. They have attended many club meetings and presented programs about TRF. And through his leadership, last year was a record year for giving by the district. GREAT JOB RUSS!!!!

For the next three years, TRF will be in the capable hands of PDG Orrin Mahoney from the Rotary Club of Cupertino. He has been a long supporter of TRF and he and his club have been involved in international projects for many years. During his year as governor, he started the Max the Match program, which has resulted in over $200,000 in additional funds being available and used on international or local projects.

He and his team will help with fund raising, grant writing, and are available to make presentations or do programs at the clubs. The team has developed into quite an organization. Members include Rotarians from across the district. They are here to help all of you.

Thank you, Orrin and all the members of your committee, for being a part of the District Leadership Team this year. And a big thank you to all the members of the District for supporting the Foundation through the years. We are counting on you again this year to keep the great work of Rotary going throughout the world.
THE MISSION OF THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL IS TO ENABLE
ROTARIANS TO ADVANCE WORLD UNDERSTANDING, GOODWILL, AND PEACE THROUGH
THE IMPROVEMENT OF HEALTH, THE SUPPORT OF EDUCATION, AND THE ALLEVIATION OF POVERTY.
The Rotary Club of Sunnyvale has sponsored Enseña Chile (Teach for Chile) since 2017. Carey Lai, a member of the club, connected with Susana Claro, the co-founder of Fundacion Enseña Chile, at Stanford University through her research assistance work. After learning of the amazing work done by Enseña Chile, Carey invited Susana to an International Service Committee meeting to present her project to committee members. After thorough discussion among the committee members, the Sunnyvale Club decided to support Susana’s project.

Enseña Chile is a non-profit organization based in Chile and a member of the international network Teach For All. It seeks to build a movement of leaders committed to improving the quality of education for all children and reducing the educational gap.

Its mission is to create a diverse network of change agents who understand the root causes of the educational problem and work to positively impact the system from different areas of influence. Throughout its 12-year history, the organization has impacted the lives of over 190,000 disadvantaged students across 10 regions of the country. Currently, Enseña Chile has 230 teachers working in 127 schools, and a total of 593 Alumni.

Through its Collective Leadership Program, Enseña Chile recruits and develops a pipeline of professionals who work for a period of 2 years as full-time teachers in low income communities. The experience empowers them to generate both short and long-term transformation in the educational system. They begin in the classroom by helping their students better their academic and personal outcomes, while also promoting joint initiatives that help school communities address challenging circumstances. These highly talented professionals receive extensive training during this time, and then go a step further as they become collaborative and determined leaders who feel motivated to contribute to the

Continues on next page
expansion of educational opportunities. Although most of the participants of the program initially did not study or plan to work in a career related to education, today 82% of the Alumni have remained involved in educational projects. Many continue as educators, while others decide to tackle inequality from different roles such as policy makers, academics, or entrepreneurs.

Below is a story shared by an alum of Enseña Chile:

My name is Ricardo, I’m an Engineer. As a children’s Science instructor a few years ago in the region of Valparaiso, I saw firsthand the hopelessness of many low-income students who were unable to see the future they dreamed about. They didn’t have the tools nor the support needed to help them walk the long path that leads to break this cycle. Then, I remembered what I learned as a University exchange student: the incredible power education has in achieving social mobility, and the key role teachers play in making it happen.

I left my job as an Engineer and began in Enseña Chile as a full-time teacher in a school with a high grade of vulnerability. There, I saw up close the depth and complexity of the Chilean education system's problems. With the support of my Mentor and fellow teachers of Enseña Chile’s community, I’ve been able to develop myself on a personal and professional level. Through my students, I have discovered the ability to positively influence the lives of other people, not only by sharing knowledge, but also by being a living example to them.

I always tell my students that it IS possible, that they CAN reach further, that they must make Science, Language and numbers their own, that they WILL solve day to day problems and improve their community’s quality of life.

Ricardo’s story is a solid proof that Rotarians' small and simple acts may bring a tremendous impact on our society. The chain reaction starts from genuine interest to learn about the world and care for others. Rotarians, it is your time to step forward and to explore the serving opportunities around you.
The Gift and Estate Planning Program of The Rotary Foundation was to be announced at the International Conference in Hawaii. Information about the program is available on the Rotary website, and in Russ Hobbs’s article later in this newsletter.

The program was formed to share news and best practices in the charitable and estate planning arena with those interested in learning more about how to create a legacy, or structure a gift, with Rotary. It is the goal of the Gift and Estate Planning Program (GEPP) to continue to educate interested individuals about the Rotary-specific policies and options that exist.

A list of 229 district Rotarians who are classified as, or have shown interest in, estate planning, including attorneys, estate planners and insurance professionals, has been compiled. This list has been further sorted to provide separate lists of attorneys, estate planners, insurance agents, etc. The intent is to offer to connect those who are interested in the GEP Program with the Rotary Foundation’s Planned Giving office. Rotarians who enter the program will become Subscribers.

Letters were sent to 56 of the District Rotarians who have been associated with estate planning. At this time five of them would like to become subscribers. We are in the process of verifying their standing with the Certified Financial Planner Board of Standards and checking for pending legislation against the individual.

Next, we will be contacting the list of attorneys who are associated with estate planning to invite them to join the program.

TRIPLE CROWN DONORS

Triple Crown Donor is an annual recognition given to those persons who meet three criteria:

Continues on next page
1. They must be Major Donors ($10,000 over any time period).

2. They must be Bequest Society Members (have included a $10,000 donation to The Rotary Foundation in their estate plan).

3. They must have donated $1,000 or more to The Rotary Foundation within the current year.

In general, this group of Rotarians is likely to meet these criteria every year. In the 2019-2020 Rotary year, 22 District Rotarians received this recognition. The leading club in this respect is the Rotary Club of Gilroy with three Triple Crown Donors. Since they began donating to the Foundation, these 22 Rotarians have donated a total of $1,431,717 to The Rotary Foundation.

MAJOR DONORS

As of the first of July, the district includes 257 Major Donors. Fifty of these Rotarians received the recognition in the 2019-2020 Rotary Year, including five Arch Klumph Society Members. With the pandemic coming this year, it is not surprising that only 14 of these recognitions were received since this past December, with none in April and May.

BEQUEST SOCIETY MEMBERS

Bequest Society Members are those who have donated at least $10,000 to the Rotary Foundation in their estate plan. The District contains 44 of these individuals. There were no new members in the 2019-2020 year. However, three members increased their level of commitment.

Phillip Dean
2019-2020
GEPP Chair
Major Donor Chair
Triple Crown Donor Chair
Many people are looking for guidance from their advisors as to how to give more to charities like The Rotary Foundation by giving more efficiently.

That is to say, they would like to have more money actually go to the charity with less going to taxes. One way to do this is to maximize the opportunity presented by donating appreciated securities or other types of illiquid assets. With the right planning and the right giving vehicle, such as a donor-advised fund, what would have been paid in capital gains taxes can instead be used by the charity you care about.

A Donor-Advised Fund (DAF) has gained popularity and can be a very satisfying way to give. A DAF provides an immediate tax deduction and may eliminate the capital gains taxes of long-term appreciated assets, as well as other types of assets. DAFs can create a ready reserve of charitable dollars to support future giving and continue the involvement of family members in the giving process.

Let’s review some of the advantages:

- **Long-Term Appreciated Securities** – Inherited stocks with an unknown cost basis or those that have grown greatly in value, can be contributed to a DAF and the donor can generally take a tax deduction for the full market value of the security.

- **Complex Assets** – Contributing illiquid assets, like a private company stock, limited partnership interest, or real estate to fund a DAF can be a smart strategy for individuals looking to minimize potential tax liability while effectively supporting their future giving.

- **Private Foundations** – A DAF can be a great alternative to a private foundation with much lower costs and less administrative obligations.

- **Generations of Givers** – Having your children and their children involved each year on the charitable opportunities funded by a DAF can teach the value of giving and create family unity for future generations.

The simplicity, convenience and cost effectiveness of Donor-Advised Funds can help you support causes in the short term, as well as allowing assets to continue to grow to fund future and longer-term philanthropic goals.

Rotary has a number of qualified specialists that can help you decide if a Donor-Advised Fund or some other giving strategy is a good one in terms of your giving goals. Let us know how we can help you give more efficiently and effectively to an organization you love and trust.
In his book, *My Road to Rotary*, Paul Harris provides amazing details about his personal determination to get things going.

“So, I proceeded to address myself to the task of getting Rotary Clubs started in cities throughout the United States…It was a long and frequently painful grind; there were headaches and heartaches in plenty, but there were also periods of joy and elation. And all the while I was trying to keep up my law practice.”

“Three long years passed before the first victory was scored…Manuel Munoz proved to be the right man to carry the message to San Francisco. He had been my room-mate in the Del Prado Hotel in Chicago and was fairly well versed in Rotary. While on a business trip to San Francisco, then rebuilding after its 1906 earthquake and fire, Munoz interested Homer Wood, a lawyer, and put him into correspondence with me. The result was that in November, 1908 we had our second Rotary club.”

“As if that were not enough, alert San Franciscans organized Rotary club number three in Oakland, club number four in Seattle, and club number five in Los Angeles…”

“And so it went on from city to city and eventually from country to country…”

There are various ways you and your fellow club members may remember Paul Harris.

- You may make a gift to The Rotary Foundation at: rotary.org/donate.

- You may celebrate a fellow Rotarian’s July 2020 birthday by making a donation to The Rotary Foundation in his or her honor.

- You may make a memorial tribute donation to The Rotary Foundation to honor a fellow Rotarian, family member or friend. Your Club Foundation Chair can help you complete the form for a memorial tribute donation.

- You may sign-up and join Rotary Direct for $85 per month, and therefore: (a) will annually give $1,000; (b) become eligible to join the Paul Harris Society; and, (c) in 10 years, will have achieved Major Donor Level 1 status with The Rotary Foundation of Rotary International.

- And, you may be inspired and take the step of honoring our Founder and his values by joining the Paul Harris Society.

Continues on next page
HOW CAN YOU JOIN THE PAUL HARRIS SOCIETY? Here are several ways: Contact Irv Stowers, District 5170 Paul Harris Society Coordinator, and let him know of your intent to join the society and annually contribute $1,000 or more to The Rotary Foundation’s Annual Fund, PolioPlus Fund, or approved global grants. You may contact Irv either by phone: 925-321-4794 or email: irving.stowers@mac.com

You may also notify The Rotary Foundation of your intent to contribute $1,000 or more every year by doing any of the following:

(a) Complete the brief enrollment form on the Paul Harris Society’s webpage at: rotary.org/paulharrissociety (look for the JOIN button to open the form);

(b) Email the Rotary Support Center at: rotarysupportcenter@rotary.org; or

(c) Call the Rotary Support Center at: 1-866-976-8279.

DID YOU KNOW?

The Rotary Foundation Trustees and Rotary International Board of Directors have both unanimously approved adding a new area of focus: supporting the environment. More that $18 million in TRF global grant funding has been allocated to environment-related projects over the past five years. Creating a distinct area of focus to support the environment will give Rotary members even more ways to bring about positive change in the world and increase our impact.

Supporting the environment becomes Rotary’s seventh area of focus, which are categories of service activities supported by global grants. It joins peacebuilding and conflict prevention; disease prevention and treatment; water, sanitation, and hygiene; maternal and child health; basic education and literacy; and community economic development.

From the RI Website
Gift & Estate Planning Program (GEPP) is something that you will be hearing much more about this Rotary Year from Chair Phil Dean of the Livermore Club, and myself. This is a program set up by the The Rotary Foundation to help “like-minded” professionals (attorneys, estate planners, CPA’s and others) to assist their client base in answering some of life’s “How Questions” such as: How can I plan for retirement? How can I pay for my children’s college education? How can I sell my business? How should I handle tax questions like capital gains and gift and estate tax? How can I plan for future health care expenses? How do I address multiple charities? How do I pass on charitable values to children and future generations? and many, many more.

We will be talking to these trusted advisers and friends of Rotary because they are in a unique position to translate these valid “how questions” into possible solutions through The Rotary Foundation’s planned giving options. The number of reasons for a donor to structure a planned gift is exceeded only by the number of benefits provided around the world through Rotary programs. By understanding the options that Rotary offers to help structure a gift, you will be in the position to help change the world.

So where will we begin? The District has provided a list of Rotarians in the District who are attorneys, accountant, or financial planners, and we will begin contacting them to determine their “interest” in becoming part of this GEPP TEAM. A Team Member would be called a “Subscriber,” and TRF has set up a program to share “news and best practices” in the charitable estate and financial planning arena with those interested in learning more about how to create a legacy, or structure a gift with Rotary. A “Subscriber” will need to adhere to a “Code of Conduct that will include: (1) Act according to the highest standard of ethics of their respective professions and individual consciences; (2) Put the mission and integrity of The Rotary Foundation above their personal and professional interests; (3) Engage and inspire others through their sense of dedication and high purpose; (4) Value the privacy of donors and potential donors; (5) Treat all people and their beliefs with dignity and respect; (6) Adhere to the spirit as well as the letter of all applicable laws and regulations and professional codes of ethics; and (7) Avoid the appearance as well as the act of impropriety or professional misconduct. In addition to any applicable rules, regulations, and ethical codes governing their individual professions, GEPP subscribers agree to abide by the foregoing standards.

If you are one of these “Like Minded Professionals” and have an interest in becoming a “Subscriber”, please contact either Phil or me.

Phil Dean
GEPP Chair
NolanDP@comcast.net

Russ Hobbs
GEPP Committee
r4hobbs@aol.com
Many resources are available to Rotarians to help them learn more about The Rotary Foundation, its recognition programs, and what donations to TRF are used for. A few examples of these resources are: the RI website, our club TRF chairs, our District 5170 TRF Committee members and our District 5170 website.

But I suggest that TRF News Today can also be a terrific resource, for both club TRF Chairs and the Rotarians in our district. In fact, to demonstrate my point and to make things easier, I have prepared an updated index of the informational articles you might find to be useful and of interest. And then, all you have to do to locate the issue noted, is click HERE. Easy, right?

<table>
<thead>
<tr>
<th>Topic</th>
<th>TRF News Today Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arch Klumph Society</td>
<td>Sept. 2019; Oct. 2019</td>
</tr>
<tr>
<td>Area WCS</td>
<td>Oct. 2019</td>
</tr>
<tr>
<td>Bequest Society</td>
<td>Nov. 2018</td>
</tr>
<tr>
<td>C.A.R.E.S. Act and effective giving</td>
<td>May 2020</td>
</tr>
<tr>
<td>District Designated Funds explained</td>
<td>Sept. 2019</td>
</tr>
<tr>
<td>District Grants</td>
<td>August 2019</td>
</tr>
<tr>
<td>Generating DDF via annual giving</td>
<td>January 2020</td>
</tr>
<tr>
<td>Gift and Estate Planning Program (GEPP)</td>
<td>April 2020; July 2020</td>
</tr>
<tr>
<td>Grand Donor</td>
<td>Sept. 2018</td>
</tr>
<tr>
<td>How do I find my donation history?</td>
<td>Sept. 2018</td>
</tr>
<tr>
<td>Legacy Giving</td>
<td>Feb. 2020</td>
</tr>
<tr>
<td>Life Insurance as a donor tool</td>
<td>Sept. 2019</td>
</tr>
<tr>
<td>Major Donor</td>
<td>June 2019</td>
</tr>
<tr>
<td>Making “The Ask”</td>
<td>Nov./Dec. 2019</td>
</tr>
<tr>
<td>Memorial and Tribute Gifts</td>
<td>Oct. 2019</td>
</tr>
<tr>
<td>Paul Harris Society (RI Requirements to join)</td>
<td>March 2019; Sept. 2019</td>
</tr>
<tr>
<td>Paul Harris Society (FAQ’s)</td>
<td>Nov. 2018</td>
</tr>
<tr>
<td>Polio Eradication and TRF</td>
<td>Nov. 2018 (et. al.)</td>
</tr>
<tr>
<td>Peace Centers</td>
<td>Sept. 2019</td>
</tr>
<tr>
<td>Strategic Giving</td>
<td>July 2020</td>
</tr>
<tr>
<td>Triple Crown Donor</td>
<td>Jan. 2019</td>
</tr>
<tr>
<td>Workplace Matching Grants</td>
<td>Oct. 2019</td>
</tr>
</tbody>
</table>
Who we are:
The Global Polio Eradication Initiative is a public-private partnership led by national governments with five partners – the World Health Organization (WHO), Rotary International, the US Centers for Disease Control and Prevention (CDC), the United Nations Children’s Fund (UNICEF), Bill & Melinda Gates Foundation and Gavi, the vaccine alliance. Its goal is to eradicate polio worldwide.

6 CORE PARTNERS
20 COUNTRIES INVOLVED
20 MILLION VOLUNTEERS
2.5 BILLION CHILDREN VACCINATED
$10 BILLION INTERNATIONAL INVESTMENT (US $)
GOAL - A POLIO FREE WORLD

Only two countries to go, Afghanistan and Pakistan.
This report is presented with TRF News Today’s grateful thanks to District 5170 Rotary Super-Star, Phil Dean, who painstakingly put it together from various RI databases for the benefit of our district and its clubs, as he has faithfully done in past years.
Trivia Question No. 1:
Which country provided the first female international
director of Rotary International?
(a) France;
(b) U.S.A.;
(c) Sweden;
(d) Canada; or
(e) Argentina?

Trivia Question No. 2:
In which state other than California were two of the
first 10 Rotary Clubs located:
(a) Washington State;
(b) New York State;
(c) Minnesota;
(d) Illinois; or
(e) Pennsylvania?

Trivia Question No. 3:
Which RI President once served as a newspaper reporter
in Denver, Colorado:
(a) John F. Germ;
(b) Barry Rassin;
(c) Ron D. Burton;
(d) Paul P. Harris; or
(e) William Boyd?

Answers on last page of this newsletter
Simple Rules for KenKen®

1. Fill in each box with a number from 1 to 4; in the more difficult puzzle, from 1 to 6.
2. Do not repeat a number in any row or column.
3. The numbers in each heavily outlined set of squares, called cages, must combine (in any order) to produce the target number in the top corner of the cage using the mathematical operation indicated. (For example, the numbers in the two squares of the cage at the bottom right of the 4x4 puzzle must equal 2 when one of the two numbers in the cage is divided into the other.)

Next, a puzzle that’s a bit more difficult:

How did you do? Did you enjoy these puzzles? Please Let me know.

EdJellen@gmail.com. (Solutions are on the next page.)
The famous Rotarian pictured is William Jennings Bryan, Rotary Club of Lincoln, Nebraska. Bryan ran for U.S. President, and was nominated by his party, in the elections of 1896, 1900, and 1908, but was defeated by William McKinley in the first two elections, and by William H. Taft in the third.

Answer to trivia question no. 1: (a) Physician Catherine Noyer-Riveau of the Rotary Club of Paris, France was the first female Rotary International Director (2008–2010).

Answer to trivia question no. 2: (c) The Rotary Clubs of Minneapolis and St. Paul, Minnesota were, respectively, the 9th and 10th Rotary clubs to be chartered.

Answer to trivia question no. 3: (d) Rotary founder Paul Harris served as a reporter for the Rocky Mountain News in Denver, Colorado in the early 1890’s.