Accessing Foundation Records

Any Rotarian can check you're their own personal contribution history by logging going to The Rotary International website: www.rotary.org and clicking on "member access" at the top right side of the home page.

If you have not registered with the foundation, you will need to do so, and you will need the following information:

1. **Membership Number (Foundation Account Number):**
   This is the number above your name and address on your copy of The Rotarian Magazine. Your club secretary also has a list of club membership numbers.
2. **Your district number: 5450**
3. **Your Club Number (**listed on the following page)

You will be sent a password by E-mail, which allows you to log on.

Club Recognition Summary and EREY (Every Rotarian Every Year) Reports

Club presidents and secretaries have access to the Club Recognition Summary and EREY report, which can be helpful in keeping tract of club giving and PHF status. Please note that due to privacy issues the CRS can only list the date of the last contribution and not the amount.

Foundation Chair Access to Club Recognition Summaries

Club foundation chairs can now access their club's CRS and EREY reports. To gain access have your club President or Secretary go to member access, then click on update club data, then scroll to the list of club officers and click on Foundation Chair which will produce a drop down list of club members. Select the member who is the foundation chair and enter his/her term (it can be just the current year or both the current and following year).

The Rotary Contact Center

If anyone has questions about The Rotary Foundation, contributions, awards or information on your clubs CRS call The Rotary Contact Center. They are there to help and are a great resource. They will ask you for your name and club number.

Phone: 1 (866) 976-8279

Fax   1 (847) 328-4101

District 550 Club Numbers

CLUB	NUMBER		
Arvada	1089	Erie	72979
Arvada Sunrise	27920	Evergreen	22493
Aurora	1090	Five Points Cultural District	82734
Aurora Fitzsimons	64714	Fort Morgan	1103
Aurora Gateway	50290	Gilpin County Peak to Peak	53203
Boulder	1091	Golden	23535
Boulder Flatirons	50833	Granby	24942
Boulder Valley	22628	Grand Lake	1104
Breckenridge-Mountain	78591	Highlands Ranch	23064
Brighton	1092	Kremmling	1108
Brighton Early	68075	Lakewood	1109
Broomfield	1093	Lakewood Foothills	1110
Broomfield Crossings	52634	Littleton	1111
Brush	1094	Littleton Sunrise	69639
Carbon Valley	71794	Longmont	1112
Castle Pines	63762	Longmont Saint Vrain	50920
Castel Rock	23607	Longmont Twin Peaks	22543
Castle Rock High Noon	52962	Mead	77425
Centennial	55547	Mountain Foothills	56721
Clear Creek County 2000	52963	Niwot	81052
Coal Creek	27606	Northglenn-Thornton	1114
Commerce City	1095	Parker	29730
Conifer	31748	Parker-Cherry Creek Valley	73366
Denver	1097	Rotary E-Club One of Distric	57094
Denver Cherry Creek	25051	Smoky Hill	1116
Denver Lodo	30423	South Jefferson County	21398
Denver Metro North	75863	Summit County	1186
Denver Mile High	26370	University Hills	1119
Denver Sky High NW	78835	Westminster	1120
Denver Southeast	23165	Westminster 7:10	30412
Denver Stapleton	23063	Wheat Ridge	1121
Denver Tech Center	50423	Winter Park- Fraser Valley	72714
Denver West	81051	Wray	1123
Englewood	1098		

USING THE
CLUB RECOGNITION SUMMARY (CRS)

ROTARY INTERNATIONAL
THE ROTARY FOUNDATION

The Rotary Foundation - Club Recognition Summary
as of September 14, 2012

(A) (B) (C) **Rotary Club, XX, Canada** (D)

District ID: 1234	Paul Harris Fellows: 8	Rotarian Donors: 4	Bequest Society: 0	All-Time Giving: $15,890.00	
Club ID: 1234	Benefactors: 2	Non-Rotarian Donors: 4	Major Donors: 0	Rotarian Non-Donors: 0	

Rotary ID	N A M E	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor
1234	R/C of Rotary Club						Jun-2008 MG	N
239316	Armstrong, Ned	N						N
40136	Carrie, Carl	N	1,100.00	PHF	Nov-1984			N
37795	Cowski, Rich	Y	1,000.00	PHF	Nov-1992		Nov-1992 APF-SHARE	N
708979	Grey, Shawn	N	1,000.00	PHF	Apr-2010			N
111365	Hall, Sal	N						N
87530	Hars, George	Y				110.00		Y

(E) (F) (G) (H) (I) (J)

What does this report track?

Club member's:
- Recognition amounts
- Available <u>Foundation Recognition Points</u>
- Current Paul Harris Fellow (PHF) level and date achieved
- Last contribution date and designation

Club data including:
- Number of PHFs, Major Donors, Benefactors, Bequest Society members, Rotarian donors, Rotarian non-donors and Non-Rotarian donors
- All-time giving

How do I read this report?

A. District and club number appear on the top left

B. Number of club's Paul Harris Fellows & Benefactors

C. Number of Rotarian donors, Rotarian non-donors and Non-Rotarian donors

D. Total historical contributions to The Rotary Foundation credited to the club. Includes all contribution types (Annual Fund, Other Giving, and Permanent Fund)

E. 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)

F. 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)

G. Paul Harris Fellow/Multiple PHF status, and month and year first PHF recognition was achieved

H. Available Foundation recognition points, 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

I. Month & year along with the restriction (program fund) of most recent contribution
J. Indicates Benefactor status. A Benefactor is anyone who informs the Foundation in writing that s/he has made provisions in their will, or other estate plan, naming the Foundation's Permanent Fund as a beneficiary; or anyone who makes an outright gift of US$1,000 or more to the Foundation's Permanent Fund.

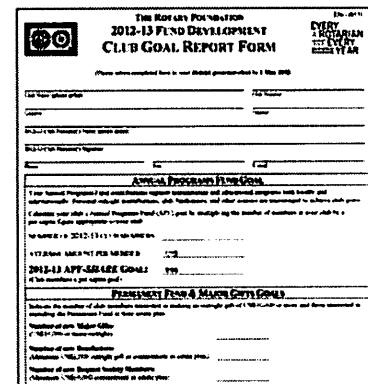## How do you get Foundation recognition points?

Foundation recognition points are awarded for contributions to the Annual Fund, PolioPlus, or the sponsor portion of a Foundation grant. One Foundation recognition point will be given for every US dollar contributed to these funds, which can then be extended to others to help them become a Paul Harris Fellow. Donors no longer need to be a Paul Harris Fellow themselves before Foundation recognition points are awarded.

How can I use Foundation recognition points to increase TRF contributions?

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 F) of all Rotarians who are currently listed as active club members (indicated by a Y in section E). 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 (102-EN) to transfer points.

How do I promote giving to the Annual Fund?

Club presidents and club Rotary Foundation chairs can track participation in the Annual Fund in section I. Noting the designation of the most recent contribution will help track progress toward TRF's goal of Every Rotarian, Every Year (EREY) – participation of every Rotarian in supporting the Foundation's programs. Use the Every Rotarian, Every Year Brochure (957-EN) to promote giving to the Annual Fund. To achieve 100% EREY recognition status for your club, each active member needs to make a contribution to the Annual Fund during the current Rotary year.

How do I promote Benefactors and Permanent Fund Support?

Benefactors are individuals who have given US$1,000 or more to the Permanent Fund, or who have committed US$1,000 or more in their will to TRF. Rotarians can become Benefactors by completing and submitting the Benefactor Commitment Card (149-EN).

The investment earnings from the Permanent Fund are already having a significant impact in helping fund Foundation programs. Supporting the Permanent Fund is a way to leave a personal legacy with Rotary and to ensure support for Rotary's work for future generations.

Where can I find this report?

This report is available through Member Access to district governors, district governors-elect, district Rotary Foundation committee chairs, district fundraising chairs, and Annual Giving subcommittee chairs, and to club presidents and club secretaries. The club president can add the

USING THE
EREY ELIGIBILITY REPORT

ROTARY INTERNATIONAL®
THE ROTARY FOUNDATION®

The Rotary Foundation - EREY Eligibility Report

as of September 19, 2012

Rotary Club, XX, United States

District Id:	1234	EREY Member Donors:	19	RFSM Member Donors:	12	PHS Eligible Donors:	0
Club Id:	1234	Non-EREY Member Donors:	9	Non-RFSM Member Donors:	16		

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
74524	rhaus, Dan F.	Y		09-Jul-2009				09-Jul-2009
100815	ck, Eric	Y	27-D	09-Jul-2009	27-Dec-2010			09-Jul-2009
804011	Car, Virginia	Y		09-Jul-2009				09-Jul-2009
427337	Chema, Howard	Y	11-Apr-2011	09-Jul-2009		09-Jul-2009		09-Jul-2009
206145	Cordova, Mike	Y	27-Dec-2010	09-Jul-2009	27-Dec-2010			09-Jul-2009
824051	Craig, Charles	Y	27-Dec-2010	09-Jul-2009	27-Dec-2010			09-Jul-2009
482032	Dason, Len C.	Y		17-Feb-2010				17-Feb-2010

What does the EREY Eligibility Report track?

Club member achievement toward individual recognition for contributions given to the Annual Fund in a given Rotary year. The report tracks the following achievements:

- Every Rotarian, Every Year (EREY)
- Rotary Foundation Sustaining Member (RFSM)
- Paul Harris Society (PHS)

Club's achievement toward banner recognition for:

- Annual EREY Club
- 100% RFSM Club

How do I read this report?

A. 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
B. EREY status = at least US$0.01 in APF contributions
C. RFSM status = at least US$100 in APF contributions
D. PHS status = at least US$1,000 in APF, PolioPlus or approved Foundation grant contributions

Where can I find this report?

This report is available through Member Access to district governors, district governors-elect, district Rotary Foundation committee chairs, district fundraising chairs, and annual giving subcommittee chairs, and to club presidents and club secretaries. The club president can add the club treasurer and/or club Rotary Foundation chair by updating club data in Member Access. To request a copy of this report from the Foundation, e-mail contact.center@rotary.org.