

The
Rotary
Foundation



Paul Harris Society Marketing Guide

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The Paul Harris Society offers every Rotarian the opportunity to join a select group dedicated to funding the good works of Rotarians through The Rotary Foundation (TRF). Our mission is to make all Rotarians aware of this official TRF program. While most Rotarians are able to give \$1,000.00 per year to Our Foundation, donors often have several competing priorities; it may be necessary to convince Rotarians that TRF is worthy of being the number-one choice for their charitable dollars.

As determining donation priorities is a decision that each individual must make for themselves, we must consider how we can effectively educate all Rotarians regarding the work of TRF, as well as the value of giving at a level that creates significant, sustained support for TRF and sets an example for other Rotarians.

We have found one of the easiest ways to establish new Paul Harris Society members is through promoting recurring gifts through Rotary Direct. Those who sign up for Rotary Direct promote the work of TRF, demonstrate the need for Rotarians to join the Paul Harris Society, and become an example of leadership within their club and district. Where the Major Donor Program and Arch Klumpf Society celebrate large contributions, the PHS celebrates Rotarians who are actively involved in club activities and are regular givers to TRF. We believe that both of these approaches offer great value to Rotary. For many, this ongoing donation will represent a significant investment of their disposable income; the decision to move forward is no less of a consideration than a Rotarian making a single large gift.

We have developed two programs designed to encourage Rotarians to make recurring gifts. First, we have the PHS Raffle. Second, we offer a specific number of matching Foundation Recognition Points (FRP) to all new Rotary Direct signups.

The Paul Harris Society Raffle uses matching points to offer a prize of a Paul Harris Fellowship. Opportunities to win the raffle happen in one of two ways. First, a member establishes a Rotary Direct reoccurring gift, or they increase their current Rotary Direct Contribution. Second, they enroll as a new PHS member.

The raffle is run for 30 days. At each Rotary club meeting a Foundation Moment is presented along with the offer to join the PHS. The member may sign up for Rotary Direct or increase their current contribution. This program requires a TRF Champion from within the club, or a District Foundation Specialist, to help organize the Rotary Moments.

Foundation Moments and Foundation-related materials, including the Foundation's short videos, are provided during these 30 days. Polio eradication updates, Projects and Scholarships funded by TRF Grants are promoted to educate members regarding the ongoing work of The Rotary Foundation and the benefit to Rotary clubs.

Upon the conclusion of the 30-day promotion a number is drawn and the Paul Harris Fellowship is awarded. Of course, the real prize is the education and increased awareness of The Rotary Foundation that has been imparted to the members in brief 3-minute Foundation moments, videos, email highlights, and how today more than ever we are supporting Rotary clubs in creating lasting benefit through District and Global Grants.

In our second program, we offer a FRP match for each and every member who establishes a recurring Rotary Direct Gift. Much like the raffle, we promote, on a district or club basis, the Rotary Direct program and offer 100, 150, 200, or 250 Foundation Recognition Points. This is tracked, as mentioned

below, through reports that tell us who is giving through Rotary Direct. The match is used as an incentive, but the real success of our efforts is convincing members of the value of giving.

Obtaining Matching Points

Many clubs accumulate matching points that are often made available for this purpose. TRF reports will provide listings of the points that individuals and clubs have. Many times, major donors are most interested in using their points to generate new contributions to The Rotary Foundation. This can provide an additional opportunity to recognize these contributors but also to reinforce that people from all walks of life and economic status are giving to Our Foundation. The Club Recognition Summary provides you with both the club's FRPs as well as individual member's points. Using this data you can develop a strategy that is not simply giving cash but giving points as a method to increase the cash contributions.

Foundation Recognition Points & Rotary Direct

Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --		Benefactor	Rotary Direct
				19,770.70	Sep-2014	GG FLOWTHR		
Y	9,000.00 *	PHF+8	Jun-2000	2,950.00	Dec-2013	AF-SHARE	N	
Y	2,345.00	PHF+1	May-2009	500.00	Feb-2010	AF-SHARE	N	
Y							N	
Y	1,700.00	PHF	May-2013		Jan-2011	AF-SHARE	N	
Y	194.25			194.25	Jun-2014	POLIO PLUS	N	
Y	50.12			50.12	Jun-2014	AF-SHARE	N	
Y	1,100.00	PHF	Sep-2013	200.00	Sep-2013	AF-SHARE	N	
Y	5,603.15	PHF+4	May-1988	2,303.15	Jun-2014	AF-SHARE	N	
Y	2,000.00	PHF+1	Dec-2013	1,100.00	Jun-2014	POLIO PLUS	N	
Y	9,000.00 *	PHF+8	Aug-1996	6,710.02	Sep-2014	AF-SHARE	Y	
Y	300.00			100.00	Sep-2014	POLIO PLUS	N	
Y							N	
Y							N	
Y	1,266.71	PHF	May-2008	0.04	May-2008	AF-SHARE	N	
Y	4,366.00	PHF+3	Sep-1987	1,634.00	Sep-2014	AF-SHARE	N	
Y	7,852.14	PHF+6	Jun-1983	2,250.00	Dec-2010	AF-SHARE	N	

The Paul Harris Society report is the key to managing your club and district's Campaign to add members to this elite group. The PHS report provides the individual's commitment to becoming a PHS member, as well as tracks each eligible contribution. This report does not display the member name, address, or contact information, but member information is available on the full report. Your marketing effort should include two elements: obtaining the commitment to become a member of the Paul Harris Society and a contribution management program. From this report you have all of the information necessary to send out, first, a recognition and thank you for joining. Regular reminders for the annual eligibility contribution can be sent to members needing to complete their gift. Thank you notes, as the eligible level of giving is reached, are essential to retaining premier contributors to our Foundation. This report

makes it easy to maintain district banners that recognize the commitment of these members to TRF. This reminder and recognition is essential to having a healthy and active PHS Committee in both the club and the district.

Paul Harris Society Report (note Rotary Direct and PHS Qualifying Contribution)

Club Name	Rotary ID	PHS Member	Rotary Direct	PHS Eligible 2013 - 2014	PHS Eligible 2012 - 2013	PHS Eligible 2011 - 2012	PHS Eligible 2010 - 2011
Albina (Portland), OR		Y		23-Feb-2014		1-Dec-2011	
Albina (Portland), OR						20-Jun-2012	
Battle Ground, WA		Y	Y				
Battle Ground, WA		Y	Y				
Beaverton, OR						14-Nov-2011	
Beaverton, OR							27-Sep-2010
Beaverton, OR		Y			1-Apr-2013	2-Apr-2012	15-Apr-2011
Beaverton, OR					9-Oct-2012		
Beaverton, OR		Y	Y	12-Apr-2014			
Beaverton, OR					15-Apr-2013	9-Dec-2011	15-May-2011
Beaverton, OR		Y	Y		1-Apr-2013	1-Apr-2012	1-Mar-2011
Camas-Washougal, WA						28-Jun-2012	
Camas-Washougal, WA		Y		8-Jan-2014		15-Jun-2012	23-Oct-2010
Camas-Washougal, WA		Y		8-Jan-2014		15-Jun-2012	23-Oct-2010
Camas-Washougal, WA		Y	Y		15-May-2013	15-May-2012	15-May-2011
Camas-Washougal, WA		Y	Y		1-Apr-2013		20-Jun-2011
Camas-Washougal, WA		Y	Y		3-Jun-2013		1-May-2011

TRF Giving Program Survey

To promote a culture of giving with all Rotarians, it is important to engage our entire membership. The first step is to recognize existing donors, providing an example to emulate. The next step is to reach out to less ebullient givers.

We have developed a survey to identify weak points in our marketing strategy. This survey is sent out to our more retiring givers based on the PHS Report. This survey is also designed to encourage participants to evaluate their giving priorities.