



## ROTARY DISTRICT 5000

### ROTARY FOUNDATION NEWSLETTER

NOVEMBER 2013



Aloha Energizers!

I am delighted to report that our statewide Polio Fundraiser on Saturday October 26, 2013 was a resounding success! With three of the four Rotary islands reporting, we are currently at \$21,800 which is \$1800 more than our goal! As the total climbs, so does our ability to make a significant contribution to the fight against Polio which will be matched two to one by the Gates Foundation yielding more than \$60,000 for Polio eradication. I want to thank all Rotarians in District 5000 for their part in this great project and sincerely hope that the fight against Polio remains a priority in all of our clubs.

The disaster in the Philippines is on all of our minds and the District has established a Relief Fund through our District Foundation to which contributions may be sent. Check should be made out to the Rotary District 5000 Foundation and mailed to treasurer Dave Berry at 1341 Kapi'olani Blvd, 8C, Honolulu, HI 96814. These donations are tax deductible. I have contacted the Governors of the affected districts to find out the best way to help them. We would like to be able to send something by the end of November.

Happy Thanksgiving to you and your families!



**Ayman El Dakhakhni**

**District Rotary Foundation Chair**

## FROM YOUR ANNUAL GIVING CHAIR, RICH ZEGAR

### Aloha Fellow Foundation Rotarians.

I hope you had a very successful Foundation Month. Many of you are doing really well while others not so much. See how you measure up in the spreadsheet in this letter; remember we're almost half way through the Rotary year. In December you should be reminding members that we're coming to the end of the tax year, so get those donations in before the end of December.

I always try to give you something in this newsletter that will help your efforts to support TRF. This month I have included, from PDG Helene A. Kalfuss, Ph.D. Zone 26 EREY Coordinator 2013-2014 a list of "reasons" members will use to avoid supporting TRF along with Dr. Helene's Tried and true responses, I find them very effective, I hope you do as well.

**I am already a Paul Harris Fellow so I have met my obligation to TRF.** We spent it! Your money was used three years after you gave it in a humanitarian project. Our obligation as Rotarians is to give an annual contribution, not just once in a lifetime!

**I give through my church's programs.** Admirable, but your church very likely does not have the infinite reach that TRF does (over 200 countries and territories) and does not have the plethora of programs that TRF has. The church programs in places like Africa, etc., primarily provide much needed hospitals and schools. TRF actually goes into the villages and provides basic sustenance, inoculations, literacy training, micro lending and much, much more than what the churches provide AND we are not tied to any religion or political party.

**I am leaving everything to my children.** If your children require every dollar you have, they are in more trouble than every penny of your money can fix. Surely they will be able to do without your annual contribution or even a \$10,000.00 bequest. While still alive, you should be able to contribute something to TRF.

**I'm tired of everything going out of the U.S.** *This is blatantly untrue and a tactic used to avoid contribution borne of ignorance.* **Approximately 60% of the funds raised stay in the U.S.** The overwhelming majority of Rotarians are here in the U.S. (approx 340,000) and their contributions, which *in total* constitute the number one contributor in the Rotary world, produce the bulk of the DDF that is generated after three years in the bank. We have the choice of how to spend that DDF. Your club can decide to do grants that only benefit your community. Many clubs have done just that and all of their DDF has been used by getting an *international partner to sponsor their global project* (or the old matching grant project) in U.S. communities. They also have the option of using their DDF (unmatched) for District Grants to be done in their backyard as well. It is the choice of the club to dictate where their DDF will go for a project.

**I don't want to fund the administrative costs of TRF!** TRF costs are funded by the interest that comes back whilst your contributions sit in the bank for three years and a portion of your RI dues. TRF is one of the highest rated charities in the world BECAUSE their administrative costs are so low and their project integrity so high. Our contributions will come back to us in full if we are project participants. In a Global Grant (and in the Matching Grants heretofore) DDF is matched dollar for dollar and club cash contributions are matched 50 cents on the dollar. So, we are getting back MORE THAN we contributed. This is another excuse for not giving based on ignorance of how TRF works.

**I am sick of being nagged for money every year!** Why did you become a Rotarian? We are a service organization. As Rotarians we are obligated to support our Foundation as our humanitarian arm in every way possible. Perhaps you need to re-examine your reasons for being in Rotary. If supporting your Foundation to the best of your financial ability is something you are unwilling to do, perhaps Rotary is not the service organization for you.

Without the Foundation your Club is just a breakfast, lunch or dinner Club. The Rotary Foundation gives us Global reach, and is the gas and oil of the engine of Rotary.

Rich Zegar

## FROM YOUR ENDOWMENT FUND CHAIR, DAVE BERRY

I have often said that The Rotary Foundation would never get into any arguments with your estate or other benefactors of your will. In fact, if they are informed of your death, they do nothing actively to enforce any provisions you may have made for the Foundation.

It recently was brought to my attention by the widow of a Rotarian who had passed away in 2008 that she had never heard from The Rotary Foundation about receiving her late husband's bequest.

When I checked with TRF they told me that they do not wish to cause any more stress on the family of a deceased Rotarian. They just trust that the provisions of the estate will be honored.

Because of this, it is important that your wishes be known. It is not necessary to change your will to include TRF; a simple codicil will do. Here is a sample.

**SAMPLE WILL AND CODICIL LANGUAGE FOR THE ROTARY FOUNDATION:** If you are drafting a new will or codicil or establishing a trust, the following is a sample language that can be used in making a bequest to The Rotary Foundation of Rotary International. A codicil may also be attached to an existing will.

'I GIVE TO THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL, AN ILLINOIS NOT-FOR-PROFIT CORPORATION, LOCATED IN EVANSTON, ILLINOIS, (insert here the sum, description of property, or percentage of residual estate). THIS GIFT IS TO BE PLACED IN SAID FOUNDATION'S ENDOWMENT AND DESIGNATED "SHARE". THIS GIFT IS TO BE PLACED IN SAID FOUNDATION'S ENDOWMENT, THE ROTARY FOUNDATION PERMANENT FUND, FROM WHICH A SPENDING PORTION WILL BE USED TO SUPPORT THE FOUNDATION'S ACTIVITIES AND PROGRAMS.

## CLUB NEWS

The small but mighty RC of Volcano raised \$3500 in the fight against polio. That's almost \$160 per member. Way to go, VOLCANO.

BEQUEST FORM

Yes, I/we have made a commitment to The Rotary Foundation in my estate plan.

Name(s) as you would like to appear on recognition

Address

City, state or province, country and postal code

Rotary Club

OPTIONAL:

District

Rotary ID #

Date(s) of Birth

Home, business, and/or mobile phone

Email

I/we designate that the spending portion of the gift to the Permanent Fund will be applied

at the trustees' discretion

through SHARE (World Fund and District Designated Fund

to the Rotary Peace Centers

to an area of focus:

Peace and conflict prevention/resolution

Disease prevention and treatment

Water and sanitation

Maternal and child health

Basic education and literacy

Economic and community development

The bequest will be funded by

Will or Living trust

Charitable remainder trust

Retirement plan/IRA/410(k)

Life insurance

Donor advised fund

Other

The amount to The Rotary Foundation will be

% or US\$

(The anticipated amount is necessary to determine recognition)

Please do not list my name in any publication

Please do not send an engraved crystal

Remember to consult independent tax and/or legal advisers before making any charitable gift.

Return this form and any supporting documents you wish to share to:

The Rotary Foundation (FN110)

1560 Sherman Avenue

Evanston, IL 60201-3698, USA

You may also complete this form on line at [www.rotary.org/bequest](http://www.rotary.org/bequest).

If you would like to know more about giving options, please consult with your district Rotary Foundation chair, or you may email us at [planned.giving@rotary.org](mailto:planned.giving@rotary.org) or call 847-866-3100.

## FROM YOUR PAUL HARRIS SOCIETY COORDINATOR, PAUL JURCSAK

### District 5000 Paul Harris Society



The official registration for District 5000 Paul Harris Society is off to tremendous start...but there is always room to grow the D5000 PHS. That includes both members that achieved eligibility for the PHS last Rotary year and others that are interested in joining the PHS to bring a positive change to communities around the world.

There are couple of ways to enroll into the membership in the Paul Harris Society. The first, and the method preferred by RI, is log into your "My Rotary" account on the Rotary International website at <https://www.rotary.org/en>. From there you can enroll in Rotary Direct at a level which achieves the required annual contribution of \$1000 or more. This can be a monthly contribution of at least \$85, quarterly contribution of \$250, semi-annual of \$500, or all at once at the \$1000 level. This will automatically enroll you in the PHS. If Rotary Direct is not for you at this time you can always complete and send in the contribution/enrollment form available on the Paul Harris Society Brochure. The brochure can be found under the "Take Action" tab on your "My Rotary" page. Go to the Resources and References list on the Donor Recognition page. You can include a contribution with your enrollment or continue with your planned giving program to meet the PHS contribution requirements.

We are currently putting together and working our way through a club visit schedule to recognize all the D5000 PHS members and to award them their certificates and lapel banners.

Please stay tuned for notification of other events celebrating membership in the D5000 Paul Harris Society. Thank you for your continued support of the Rotary Foundation to Engage Rotary, Change Lives.

**HERE IS YOUR ROTARY FOUNDATION TEAM FOR THE  
2013-14 ROTARY YEAR. FEEL FREE TO CONTACT ANY  
OF US IF WE CAN BE OF ANY HELP TO YOU.**

**DISTRICT ROTARY FOUNDATION CHAIR - PDG**

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**100% PAUL HARRIS FELLOW CLUBS -**

Win Schoneman [wschoneman@hawaii.rr.com](mailto:wschoneman@hawaii.rr.com)

**WHITE HAT SOCIETY/PAUL HARRIS SOCIETY -**

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**EREY CHAIR/POLIO PLUS CHAIR - PDG Roz Cooper**  
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**ENDOWMENT FUND/BEQUEST  
SOCIETY/BENEFACTORS 100% CLUBS - Dave Berry**  
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**GRANTS CHAIR - Dave Berry**  
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**HAWAII - Albert Jeyte** [stay@kilauealodge.com](mailto:stay@kilauealodge.com)

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D5000 2013 ROTARY FOUNDATION TRACKING SHEET															
	Last Update:	November 28 2013													
		Annual Fund	Anl Fund	% Goal	Members	Per	Current #	# Sustain.	% Sustain.			Total	New	New Beq	\$ to be
	Club Name	Goal	Given	Achvd	01/13/07	Capita	Members	Members	Members	No. EREY	% EREY	Giving	Benef.	Society	on Target
1	Ala Moana	\$8,550	\$3,920	45.8%	40	\$98.00	40	16	0.4	29	0.725	\$3,836	0	0	\$358 ahead
2	Diamond Head	1,800	0	0.0%	11	0.00	25	0	0.00	0	0.00	0.00	0	0	\$750 behind
3	Downtown Honolulu	3,375	1846	54.7%	26	71.00	25	10	0.40	11	0.44	1646.00	0	0	\$440 ahead
4	E Club of Hawaii	500	1000	200.0%	25	40.00	25	1	0.04	1	0.04	1610.00	0	0	\$792 ahead
5	East Honolulu	12,750	1305	10.2%	51	25.59	51	1	0.02	1	0.02	1000.00	0	0	\$4,008 behind
6	Hanalei Bay	12,200	5270	43.2%	51	103.33	51	7	0.14	8	0.16	64705.00	0	0	\$187 ahead
7	Hawaii Kai	6,700	725	10.8%	16	45.31	16	4	0.25	8	0.50	725.00	0	0	\$2,067 behind
8	Hilo	10,800	7859	72.8%	71	110.69	71	33	0.46	43	0.61	7605.00	0	0	\$3,359 ahead
9	Hilo Bay	5,010	2820	56.3%	57	49.47	57	3	0.05	3	0.05	950.00	0	1	\$733 ahead
10	Honolulu	20,400	8285	40.6%	195	42.49	195	17	0.09	24	0.12	8435.00	0	0	\$215 behind
11	Honolulu Pau Hana	1,080	253	23.4%	26	9.73	26	1	0.04	3	0.12	100.00	0	0	\$197 behind
12	Honolulu Sunrise	4,950	7631	154.2%	39	195.67	39	22	0.56	24	0.62	6031.00	3	0	\$5,569 ahead
13	Honolulu Sunset	13,250	14690	110.9%	55	267.09	55	9	0.16	17	0.31	11098.00	0	0	\$9,169 ahead
14	Kahala Sunrise	10,000	1175	11.8%	31	37.90	31	5	0.16	7	0.23	1150.00	0	0	\$2,992 behind
15	Kahului	4,500	2825	62.8%	41	68.90	41	9	0.22	19	0.46	2775.00	0	0	\$950 ahead
16	Kaneohe	6,350	0	0.0%	27	0.00	27	0	0.00	0	0.00	0.00	0	0	\$2,646 behind
17	Kapaa	5,600	2122.5	37.9%	32	66.33	32	6	0.19	8	0.25	6222.50	0	0	\$211 behind
18	Kapolei	4,175	525	12.6%	27	19.44	27	1	0.04	2	0.07	190.00	0	0	\$1,215 behind
19	Kapolei Sunset	2,100	85	4.0%	14	6.07	14	0	0.00	2	0.14	135.00	0	0	\$790 behind
20	Kauai	6,750	2450	36.3%	27	90.74	27	9	0.33	9	0.33	1150.00	1	0	\$363 behind
21	Kihei Sunrise	1,900	1885	99.2%	16	117.81	16	9	0.56	15	0.94	2040.00	0	0	\$1,093 ahead
22	Kihei Wailea	3,900	1977	50.7%	30	65.90	30	13	0.43	16	0.53	1050.00	0	0	\$352 ahead
23	Kona	4,290	3500	81.6%	38	92.11	38	6	0.16	6	0.16	2000.00	0	0	\$1,713 ahead
24	Kona Mauka	4,200	2650	63.1%	27	98.15	27	0	0.00	0	0.00	0.00	0	0	\$900 ahead
25	Kona Sunrise	2,040	2525	123.8%	23	109.78	23	4	0.17	13	0.57	2475.00	0	0	\$1,675 ahead
26	Lahaina	3,800	4050	106.6%	35	115.71	25	9	0.36	10	0.40	4050.00	0	0	\$2,467 ahead
27	Lahaina Sunrise	2,500	3380	135.2%	21	160.95	21	10	0.48	11	0.52	2236.81	0	0	\$2,338 ahead
28	Maui	3,300	3377	102.3%	27	125.07	27	7	0.26	24	0.89	2610.00	0	0	\$2,002 ahead
29	Metropolitan Hono.	21,000	2750	13.1%	96	28.65	96	11	0.11	11	0.11	2750.00	0	0	\$6,000 behind
30	Mililani Sunrise	3,503	1417	40.5%	20	70.85	20	6	0.30	10	0.50	1590.00	0	0	\$043 behind
31	North Hawaii	4,500	580	12.9%	36	16.11	36	3	0.08	4	0.11	450.00	0	0	\$1,295 behind

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	Club Name	Goal	Given	Achvd	01/13/07	Capita	Members	Members	Members	No. EREY	% EREY	Giving	Benef.	Society	on Target
32	Pahoa Sunset	2,650	466	17.6%	15	31.07	15	1	0.07	10	0.67	426.00	0	0	\$638 behind
33	Pearl Harbor	7,000	12967	185.2%	34	381.38	34	18	0.53	23	0.68	10795.00	0	0	\$10,050 ahead
34	Pearlridge	6,750	2416	35.8%	42	57.52	42	2	0.05	28	0.67	4293.00	0	0	\$397 behind
35	Poipu Beach	4,650	180	3.9%	30	6.00	0	0	0.00	0	0.00	0.00	0	0	\$1,758 behind
36	South Hilo	7,200	1014	14.1%	51	19.88	51	1	0.02	7	0.14	842.00	0	0	\$1,986 behind
37	UpCountry Maui	1,800	1337	74.3%	18	74.28	18	7	0.39	13	0.72	1337.00	0	0	\$587 ahead
38	Valley Isle Sunset	1,760	0	0.0%	10	0.00	10	0	0.00	0	0.00	0.00	0	0	\$733 behind
39	Volcano	2,000	300	15.0%	22	13.64	22	1	0.05	2	0.09	300.00	0	0	\$533 behind
40	Wahiawa Waialua	3,000	350	11.7%	15	23.33	15	2	0.13	2	0.13	300.00	0	0	\$900 behind
41	Waianae Coast	4,960	0	0.0%	30	0.00	30	0	0.00	0	0.00	0.00	0	0	\$2,067 behind
42	Waikiki	11,200	3621	32.3%	66	54.86	66	12	0.18	16	0.24	2321.00	0	0	\$1,046 behind
43	Wailuku	2,700	5540	205.2%	24	230.83	24	2	0.08	2	0.08	5000.00	0	0	\$4,415 ahead
44	West Honolulu	4,000	1930	48.3%	43	44.88	43	4	0.09	4	0.09	1500.00	0	0	\$263 ahead
45	West Kauai	2,400	500	20.8%	21	23.81	21	1	0.05	1	0.05	500.00	0	0	\$500 behind
46	West Pearl Harbor	3,465	100	2.9%	18	5.56	18	0	0.00	1	0.06	160.00	0	0	\$1,344 behind
47	Windward Oahu	5,840	1061	18.2%	34	31.21	34	5	0.15	34	1.00	961.00	1	0	\$1,372 behind
48	Windward Oahu Sun.	3,100	100	3.2%	21	4.76	21	0	0.00	0	0.00	0.00	0	0	\$1,192 behind