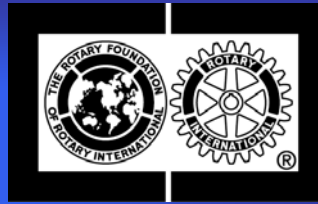


The Regional Rotary Foundation

COORDINATOR COMMUNIQUE



February 2004

A Forum for Foundation News

FUND DEVELOPMENT

Contributions Update

Contributions for the six months ending 31 January 2004 totaled US\$50,943,346 down -13.11% over last year. Contributions to the Annual Programs Fund increased 11.15% to US\$28,621,144 over January 2003. It was expected that unrestricted contributions would decline during the 2002-2003 Polio Eradication Fundraising Campaign (PEFC). However, comparing annual giving to pre-PEFC contributions in January 2002 and 2001 respectively, contributions are not keeping pace

with worldwide US\$70,000,000 Annual Programs Fund Goal set for this Rotary year. Contributions to the Permanent Fund increased 29.87% to US\$5,389,764. Restricted giving declined -46.08% to US\$2,743,113 as Rotarians continue to concentrate on completing their PEFC commitments.

	<u>January 2004</u>	<u>January 2003</u>	Increase (+) Decrease (-)
Annual Programs Fund	US\$28,621,145	US\$25,749,322	+11.15%
PolioPlus*	US\$14,189,324	US\$23,643,613	-39.99%
Permanent Fund	US\$ 5,389,764	US\$ 4,150,150	+29.87%
<u>Restricted Giving</u>	<u>US\$ 2,743,113</u>	<u>US\$ 5,087,176</u>	<u>-46.08%</u>
TOTALS	US\$50,943,346	US\$58,630,261	-13.11%

	<u>January 2002</u>	<u>January 2001</u>	Increase (+) Decrease (-)
Annual Programs Fund	US\$29,179,558	US\$29,297,177	- 0.40%
Permanent Fund	US\$ 4,822,783	US\$ 4,861,065	- 0.79%
<u>Restricted Giving</u>	<u>US\$ 7,372,217</u>	<u>US\$ 8,791,776</u>	<u>-16.15%</u>
TOTALS	US\$41,374,558	US\$42,950,018	- 3.67%

*NOTE: The Polio Eradication Fundraising Campaign was conducted in the 2002-2003 Rotary Year.

EVERY ROTARIAN, EVERY YEAR

Clubs to Set an 2004-2005 Annual Programs Fund Goal at PETS

Following the International Assembly in Anaheim, California, USA, the first of the 2004-2005 President Elect Training Seminars (PETS) will begin. As part of the new ***Every Rotarian, Every Year*** effort, the DGEs and their district trainers will instruct their club presidents-elect on setting a club Annual Programs Fund Goal toward achieving the US\$100 per capita goal by 2005 as unanimously endorsed by every district at the 2001 Council on Legislation.

At PETS, each club president-elect will receive a 2004-2005 Club Goal Report Form to complete and submit to their DGEs **no later than 7 May 2004**. The Forms for each club have now been shipped to the DGEs along with their PETS supplementary materials and are expected to be waiting for them upon their return home from Anaheim.

English: www.rotary.org/newsroom/downloadcenter/pdfs/trf_club_goal_report_form04.pdf

French: www.rotary.org/newsroom/downloadcenter/pdfs/TRF_club_goal_report_form04_FR.pdf

Japanese: www.rotary.org/languages/japanese/download/trf_club_goal_report_form04_JA.pdf

Korean: www.rotary.org/languages/korean/download/trf_club_goal_report_form04_KO.pdf

Spanish: www.rotary.org/languages/spanish/download/trf_club_goal_report_form04.SP.pdf

Portuguese: www.rotary.org/languages/portuguese/download/trf_club_goal_report_form04.PO.pdf

At PETS, the DGEs should collect the Forms, total all of the club goals, and send the club totals for their district to the Secretariat by **fax to 1-847-328-5260 or by email to:**

EveryRotarianEveryYear@rotaryintl.org no later than **10 May 2004** and then submit the Club Goal Report Forms to the Annual Giving Team at the Secretariat. The Foundation's Trustees will use the club goal information to announce

the Worldwide Annual Programs Fund Goal in Osaka Japan.

You will be asked to assist in collecting the Club Goal Report Forms from the District Governors-elect and clubs. For more information, contact the Annual Giving Section by e-mail: EveryRotarianEveryYear@rotaryintl.org; by telephone at 1-847-866-3352; or by fax at 1-847-328-5260.

Reminder: 2003-2004 Annual Programs Fund Worldwide Goal -- US\$70,000,000.00

Encourage all Rotarians in your Zones to contribute to the Annual Programs Fund and help achieve our US\$70,000,000 goal! Listed

below are the goal achievement benchmarks Districts should strive for at various times of the year:

- 20% Goal Achievement by 30 September
- 33% Goal Achievement by 30 November
- 50% Goal Achievement by 31 December
- 67% Goal Achievement by 30 March
- 100% Goal Achievement by 30 June

BEQUEST SOCIETY

As of 31 January 2004, there were 3,342 Bequest Society commitments at an expected value of US\$150.9 million. Surpassing the US\$150 million threshold in less than four years is a significant achievement. For more information

about the Bequest Society please send an email to plannedgiving@rotaryinl.org, or contact Eric Schmelling at (847) 866-4458.

DONOR ADVISED FUNDS UPDATE

As of 31 January 2004, there were 28 DAF accounts with a fair market value of US\$1.7 million. For additional information on The

Rotary Foundation Donor Advised Fund, please visit <http://daf.rotary.org>.

HUMANITARIAN GRANT PROGRAMS

Dear RRFs,

The Humanitarian Grants Program would like to thank you for your recent feedback on the creation of a best practices manual for District Simplified Grants. The overwhelming response was positive. This having been said, many of you also cautioned that the time spent on creating a new publication may be better spent on processing grants.

As you are acutely aware, there is substantial concern on the part of Rotarians in relation to the time it is taking to process grant applications and respond to inquiries. The primary cause of this situation is a hiring freeze that has caused the Humanitarian Grants Program Division to be understaffed. The good news is that in late December we were given permission to fill most of our open positions, and in the month of

February anticipate welcoming eight new staff members.

We have taken your suggestions into consideration and are focusing our resources on processing grant applications, payments and reports. Once the new staff has been trained and able to appropriate support and serve Rotarians, we hope to go back to the useful project of a best practices manual.

As we move forward, we ask that you share with districts in your region the current status of our operation and express our gratitude for their patience during this challenging time.

Warmly,

*Anne Gross, Division Manager
Humanitarian Grants Program*

DSG Deadline

31 March 2004 is the deadline to submit DSG requests for activity during the 04-05 program

year. The attached document contains a list of the districts that have submitted requests as of 9

February. Please work with district leaders in

your zones to ensure that DSG request forms are sent to TRF prior to the deadline.



04-05 DSG
ubmissions - 9 Feb .

EDUCATIONAL PROGRAMS

Rotary Centers for International Studies

Rotary Centers Peacebuilders

The Rotary Foundation is currently securing Rotary Centers Peacebuilder District pledges to support Class IV and subsequent classes of Rotary World Peace Scholars. Districts that allocate US\$25,000 per year or US\$50,000 every other year from their District Designated Funds (DDF) to support a Rotary World Peace Scholar for study at one of the seven *Rotary Centers for*

International Studies in peace and conflict resolution will be known as Rotary Centers Peacebuilder Districts and will be recognized appropriately. Funding the Rotary World Peace Scholars is a global Rotary effort and allocations of DDF in any amount are always encouraged. Rotary Centers Peacebuilder District pledge forms will be available on the RI Web site.

Ambassadorial Scholarships and Grants for University Teachers

Acceptance Packet and Handbook for 2004-05 Ambassadorial Scholars

2004-05 Ambassadorial Scholars are now receiving their scholarship Acceptance Packet, including the Scholar Handbook. Once again this year, scholars are encouraged to schedule attendance at an outbound scholar orientation seminar upon receipt of their packet. Sponsor

districts are also encouraged to assist scholars in doing so, through various communications (i.e. mailing to District Governors acknowledging receipt of the 2004-05 Scholarship Applications from their districts; mailing to Sponsor Counselors scheduled for March 2004).

Program Evaluations

In January, all District Rotary Foundation Chairs should have received a survey from The Foundation's Scholarships department. Districts are asked to give input on the Cultural Ambassadorial Scholarships Program as well as on how the April 2001 Trustee Decisions have

impacted the Ambassadorial Scholarships program. The survey was sent as a writable PDF file via email or fax. The deadline for submitting the survey to The Foundation is 15 Feb 2004. Results will be presented to The Foundation Trustees at their April 2004 meeting.

Scholarships Fund Pool for Low-Income Countries

All districts, both high and low-income, are encouraged to donate any amount of DDF to the fund pool as they plan their DDF spending for program year 2005-06. All districts and non-districted clubs in low-income countries may submit one scholarship application to compete for

up to 20 Ambassadorial Scholarships awarded annually through the fund pool. All applications are considered on a world-competitive basis by a Trustee-appointed selection committee. **The deadline to submit applications is the same as for all 2005-06 Ambassadorial Scholarship**

applications: 1 October 2004. Contact: Renée
Stephenson, Resource Development Supervisor,

tel: 847-866-3314; fax: 847-866-0934; email:
stephenr@rotaryintl.org.