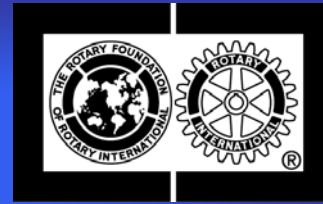


The Regional Rotary Foundation

COORDINATOR COMMUNIQUE



June 2004

A Forum for Foundation News

FUND DEVELOPMENT

Contributions Update

As of 31 May 2004, contributions to The Rotary Foundation totaled US\$90,893,888, a decrease of 17.56% over last year. Of that amount, Annual Programs Fund contributions totaled US\$55,242,989, an increase of 28.37% over last year and an increase of 8.10% over May 2002 figures, the year in which we reached our highest level of annual giving. Cash contributions to Polio Eradication Fundraising Campaign totaled US\$22,502,669 as clubs continue to make payments on their commitment. Contributions to the Permanent Fund increased 51.13% at US\$7,412,185 over last year's figures but remained on par with May 2002 contributions.

	<u>May 2004</u>	<u>May 2003</u>	<u>Increase (+)</u> <u>Decrease (-)</u>
Annual Programs Fund	US\$55,242,989	US\$ 43,033,480	+28.37%
PolioPlus	US\$22,502,669	US\$ 53,286,130	-55.77%
Permanent Fund	US\$ 7,412,185	US\$ 4,904,522	+51.13%
<u>Restricted Giving</u>	<u>US\$ 5,736,045</u>	<u>US\$ 9,036,453</u>	<u>-36.52%</u>
TOTALS	US\$90,893,888	US\$110,260,585	-17.56%

	<u>May 2004</u>	<u>May 2002</u>	<u>Increase (+)</u> <u>Decrease (-)</u>
Annual Programs Fund	US\$ 55,242,989	US\$51,100,581	+8.10%
PolioPlus	US\$ 22,502,669		
Permanent Fund	US\$ 7,412,185	US\$ 7,527,810	-.015%
<u>Restricted Giving</u>	<u>US\$ 5,736,045</u>	<u>US\$14,408,217</u>	<u>-20.37%</u>
TOTALS	US\$90,893,888	US\$73,036,608	+24.44%

2004-2005 Worldwide Annual Programs Fund Goal Announcement – US\$100,000,000

At the Convention in Osaka, Vice Chairman Carlo Ravizza made the following announcement about the 2004-2005 Annual Programs Fund Goal:

“15,267 clubs in 449 districts have pledged US\$61,173,000. The Foundation hopes to collect up to US\$100,000,000 for the Fund.”

Club Goal Setting Update

We will be seeking your assistance in contacting the 2004-2005 District Governors in your zones to help us collect 2004-2005 Club Goal Report Forms. As of 18 June 2004, actual goal forms have only been received from 9,926 clubs and an additional 99 districts have set goals for their clubs for a total of 16,499 clubs reporting goals totaling US\$67,137,415; a per capita of US\$92.10. Clubs that have not yet done so should submit their goal as soon as possible to their district governor or assistant governor. The 2004-05 Club Goal Report Form (available in a PDF file and a writable word document) is available online at:

www.rotary.org/newsroom/downloadcenter/foundation/development.html#annual.

Every Rotarian, Every Year

Council on Legislation Proposal 04-157

At the June 2004 Council on Legislation, the resolution for every district to endorse the *Every Rotarian, Every Year Annual Programs Fund Marketing Plan* passed by a majority vote. To view this legislation, go to: www.rotary.org/newsroom/downloadcenter/pdfs/col04_part4.pdf

Monthly Contribution Report

Beginning with the 2004-2005 Rotary year, the district Monthly Contribution Report has been revised to include the club goal and percent of goal achieved. Setting an annual giving goal is an ideal opportunity for every Rotary club to leave its mark on Rotary's centennial year.

"Every Rotarian, Every Year Monthly Newsletter"

Available on 1 July 2004, the first *Every Rotarian, Every Year Newsletter* is a forum for sharing fundraising ideas, accomplishments and information of interest to all Rotarians. The first issue will be mailed to all Rotary's Senior Leaders; District Governors; District Governors-elect; District Rotary Foundation Chairs; Annual Giving Subcommittee Chairs and all club presidents worldwide. Future monthly issues will be available online on the Foundation's homepage at www.rotary.org where you can also sign up to receive the newsletter via email.

Goal Achievement Guidelines

Listed below is a gauge of where each club and district's goal achievement should be at certain times of the year:

20%	Goal Achievement by 30 September	(1 July - 30 September)
33%	Goal Achievement by 30 November	(1 October - 30 November {Foundation Month})
50%	Goal Achievement by 31 December	(1 December - 31 December)
67%	Goal Achievement by 30 March	(1 January - 31 March)
100%	Goal Achievement by 30 June	(1 April - 30 June)

Promoting the Rotary Foundation Sustaining Member (RFSM) Program

The RFSM program is the vehicle to achieve APF success. Rotarians worldwide are asked to become RFSMs and contribute US\$100 or more to the Annual Programs Fund-*SHARE* every year to help Rotary climb to even greater heights during our second century of service.

Recurring Credit Card Contributions (US Only)

The Foundation's *TRF DIRECT Donations* program can now accept MasterCard, VISA and American Express credit cards for recurring monthly, quarterly or annual contributions to the Annual Programs Fund on the 1st of every month. To participate, donors must fill out a Credit Card Authorization Form. Currently, this program is available in the United States only. For more information, please contact Ms. Gregoria Garcia at: garciag@rotaryintl.org or by telephone at: 1-847-866-3137.

New - Email address for Every Rotarian, Every Year

A new email address has been established to respond to Rotarian's questions about the *Every Rotarian, Every Year* program including Paul Harris Fellow recognition, contribution inquiries, and forwarding of 2004-2005 Club Goal Report Forms. Please direct inquiries to: everyrotarianeveryear@rotaryintl.org.

NEW -- Centennial Paul Harris Fellow Certificates

Effective 1 July 2004, all new Paul Harris Fellows will receive a "Centennial Paul Harris Fellow" Certificate that carries the "Celebrate Rotary" emblem.

30 June 2004 Contribution Deadline

For contributions to be credited for the 2003-2004 Rotary year, they must be postmarked by 30 June 2004 and received at the Foundation by 9 July 2004. Any contributions received after that date will be entered for the 2004-2005 Rotary year.

Donor Advised Funds Update (US only)

As of 31 May 2004, there were 32 DAF accounts with a fair market value of US\$1.8 million.

Permanent Fund Update

The Permanent Fund's net assets (US\$135.9 million) plus expectancies (US\$267.1 million) equaled US\$403.0 million as of 30 April 2004. The Permanent Fund target is US\$500 million in net assets and expectancies by 30 June 2005.

Bequest Society Update

As of 31 May 2004, there were 3,687 Bequest Society commitments with an expected value of US\$160.0 million. (This value is included in the Permanent Fund expectancies number provided above.) For more information on Donor Advised Funds or the Bequest Society, please send an email to plannedgiving@rotaryintl.org or contact Eric Schmelling at 1-847-866-3100.

HUMANITARIAN GRANT PROGRAMS

TRF has completed its second year of DSG approvals. We take this opportunity to provide you with an update on the status of DSGs for the 04-05 Program Year. As of 16 June 2004:

- 385 DSG requests were received. 326 of those requests were approved, 49 remain pending, 5 were reverted to the sponsor, and sponsors withdrew 4.

	Approved	Pending	Reverted	Withdrawn
385 requests received	326	49	5	4

While the majority of DSG requests were approved, requirements which caused pending DSGs not to be approved include:

49* pending requests *	Lack of reporting on 03-04 DSG	Insufficient DDF	Incorrect authorizations
	34	13	11

* A number of DSG requests were not approved for multiple reasons.

- In order for districts to receive payment on their 04-05 DSGs, the following requirements must be met, if applicable:
 - Fulfillment of payment contingencies.
 - Submission of spending and publicity plans (for grants over US\$25,000)
 - Submission of reports containing eligible expenditures of at least 50% of the district's 03-04 DSG award.
- Based on the level of DSG reporting received to date, we estimate that approximately 100 04-05 DSG payments will be processed in July 04. The remaining DSGs will be paid as soon as all pre-payment requirements are met.

The most important component of a successful DSG is a districts willingness and ability to thoroughly report on the use of grant funds. TRF requires districts to report every six months throughout the life of a grant, and expects significant progress on one DSG before another is paid. The requirements were established to ensure proper stewardship of TRF funds. Given that stewardship is a high priority, Rotarians should be prepared to meet DSG reporting requirements if they intend to continue participating in DSGs.

EDUCATIONAL PROGRAMS

Rotary Centers for International Studies

We need your help...

DDF contributions are lagging far behind. Currently we have a mere US\$45,000 donated. As of this time last year Districts had already donated 50% of the approximate US\$3.5 million needed for the upcoming class of Rotary World Peace Scholars.

Each RRFC is asked to obtain at least one Rotary Center Peacebuilder District Commitment for TRF by 31 July 2004. Districts that donate their District Designated Funds in the amount of US\$25,000 per year or US\$50,000 every other year to support a Rotary World Peace Scholar for study at one of the seven *Rotary Centers for International Studies in peace and conflict resolution* for the 2005-07 program and beyond will be recognized as Rotary Centers Peacebuilder Districts. The amount is equivalent to that needed to fund a full two-year program for a Rotary World Peace Scholar: US\$25,000 each year or US\$50,000 every second year. DDF donations are naturally welcome.

How do we commit to becoming a Rotary Centers Peacebuilder District?

- Download the form:

http://www.rotary.org/foundation/educational/amb_scho/centers/funding/support.html)

- obtain the DRFCC's signature
- return this sheet to Judy Gibson, Manager, Rotary Centers for International Studies, Educational Programs, The Rotary Foundation, 1560 Sherman Ave, Evanston, IL 60201; fax: +1/847-866-0934; e-mail: gibsonj@rotaryintl.org.

Peacebuilder Districts to Date: D.2560/Japan, D.2700/Japan, D.3660/Korea, D.3740/Korea, D.7690/USA

Rotary World Peace Scholar Graduates from UC-Berkeley Secure Meaningful Employment

The 2002-04 Rotary World Peace Scholars are graduating and moving on to important jobs. Michael Huneault, sponsored by District 7040 in Canada, received his Masters Degree from the University of California, Berkeley in June 2004. Michael has a strong interest in cross-cultural communication both internationally and locally. He received a B.SC in communications from the University of Montreal as well as a graduate diploma in francophone studies from University of Paul Valéry, Montpellier, France. In 1999, he co-founded and currently is Vice-President of Youth eMage Jeunesse, a multimedia resource NGO that introduces adolescents to cutting edge technologies in highly multicultural settings through personal projects. Michael reports that because of the Rotary World Peace Scholarship, the top recruiting team for the Canadian government is interviewing him. After a world-wide search the government has selected 70 young Canadians that they want to bring into responsible government jobs. He expects to be starting with the government program in September 2004.

Rotary World Peace Scholars at 2004 TRF Multi-District Seminars

RRFC's interested in featuring an inbound or outbound Rotary World Peace Scholar at no expense to TRF should contact Judy Gibson, Rotary Centers Department Manager, to discuss possible arrangements.

Ambassadorial Scholarships and Rotary Grants for University Teachers

Host Counselors Appointments

15 June 2004 was the deadline for districts to notify TRF of host counselor assignments for 2004-05 Ambassadorial Scholars and University Teachers. This year, TRF streamlined the materials sent to the District Governor-elects and current District Scholarship Subcommittee Chairs. TRF simply mailed a list of scholars assigned to a Host District along with biographical forms for all scholars on the list. DGEs and SSCs were referred to the following site for additional program literature in all languages: <http://www.rotary.org/foundation/educational/hcr/index.html>.

The Ambassadorial Scholarships and Rotary Grants for University Teachers programs rely on Rotarian counselors to guide participants' Rotary involvement during their experience abroad. Without active and effective host counselors, TRF becomes merely a funding source for study or teaching abroad.

To ensure that the program is effective in your part of the world, please talk with the districts you work with and ensure that they appoint excellent Rotarian counselors for the scholars and university teachers they will host. The appointments can be sent to TRF by fax (+1/847 866 0934) or e-mail: scholarshipinquiries@rotaryintl.org.

Regional Scholar Orientation Seminars

Thanks to Regional Scholar Orientation Seminars held throughout the Rotary world, in 2003-2004 approximately 730 Ambassadorial Scholars, Rotary World Peace Scholars, and University Teachers had the opportunity to meet with their sponsor or host Rotarians to learn more about RI, TRF, and their roles and responsibilities as “ambassadors of goodwill.” For the fifth year, the Trustees have offered grants to defray the costs of large-scale, multi-district seminars. Nearly US\$92,000 total was awarded to 21 seminars in 2003-04. Since outbound orientation is mandatory for all Ambassadorial Scholars, the importance of these regional seminars has continued to grow. We are currently working with districts in Russia, Brazil, Spain and Italy, involving RI regional offices where possible, to help them start (or resume) organizing a seminar for 2004-05.

For questions, please contact: Stephanie Veit, Scholarships Department Manager, tel: +1/847-866-3323; fax: +1/847 866 0934; e-mail: veits@rotaryintl.org or visit our website at: http://www.rotary.org/foundation/educational/amb_scho/seminars.html.

Scholarships Fund Pool for Low-Income Countries

DDF contributions are lagging far behind this year. Currently US\$63,800 has been donated to the fund pool. At this time last year, Districts had already donated 40% of the approximate US\$500,000 needed for the next class of scholars. 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.

Donated 2005-06 Ambassadorial Scholarships

Districts receiving donated 2005-06 Ambassadorial Scholarships were sent notification in April 2004. These districts are encouraged to work diligently to locate suitable candidates for these scholarships, to interview and select **two** finalists per scholarship donated, and to send two applications to the donating district for final review and selection by 1 September 2004. The donating district should then select the final recipient and send the endorsed application to TRF by **1 October 2004.**

Questions about the Scholarships Fund Pool for Low-Income Countries and Donated Ambassadorial Scholarships may be directed to Renée Stephenson, Resource Development Supervisor by e-mail: stephenr@rotaryintl.org, telephone: +1/847-866-3314, or fax: +1/847-866-0934.

Group Study Exchange

Reimbursements for 2003-04

Districts are reminded that requests for reimbursements from the 2003-04 program year should be sent to the GSE Coordinators at TRF **within two months** of the incurred expenditures. Payments are issued within 20 business days from the day they are submitted if documentation and receipts are complete.

2005-06 Pairing options

Districts should be well on their way to securing a partner district for the 2005-06 program year. TRF will send the 2005-06 GSE District Application forms to DGEs in July and August: first electronically and then followed up by hard copy. The completed applications must be submitted to TRF by **1 October 2004**. All GSE forms and information will be available on the TRF website for easy download. Failure to submit the district GSE application on time can limit the chances of securing a district's first choice GSE partner. If districts need assistance in contacting potential GSE partners, they can contact their GSE coordinator at TRF.

2004-05 GSE Materials to be sent to District GSE Chairs

In August, TRF will send all GSE materials (including handbooks, brochures, applications and alumni pins) to each District GSE Chair. Please be advised that many forms and publications have been revised. You will notice that the team member handbook and the Program Guide for Rotarians have a new look and are more user-friendly. We ask that your district use these new 2004-05 forms and consult the new Program Guide rather than the previous material that is now outdated. All GSE publications will be posted on the web for download.

Final Reports for GSE teams

GSE team reports are mandatory and should be submitted to TRF within 2 months of the team's return to the sponsor district. The reports should be 2-4 pages and mention both the highlights of the team's experiences and suggestions for improvement for the host district and the program. Please refer to the Final Report form found in the back of the Program Guide for Rotarians (Pub #165) and the Team Handbook (Pub #164). Teams are encouraged to include pictures and articles to be featured on the GSE website or in other Rotary publications. The GSE is not considered complete without submission of the final report.

POLIOPLUS PROGRAM

National Immunization Day Travel

Rotarians leading NID groups and who have stated they would welcome additional participants:

- Terry Youlton - India, November NIDs, Contact tyoulton@mnsi.net
- Dave Ellis - India, November NIDs, Contact dellis@carlsontravel.com

PolioPlus Partners

The PolioPlus Partners Program has more than US\$2 million in needs for important projects. Countries in need include: India, Democratic Republic of the Congo, Nigeria, and Nepal. For further information on any of the projects, contact Nicole Kreamer at kreamern@rotaryintl.org.

Planning & Administration Update

DRFCC/District Governor Relationship

It is recognize that some District Governors are having difficulty with the signature authority for DDF being given to the District Rotary Foundation Committee Chair (DRFCC). Unfortunatley, the 2004-05 the Chairman's message has not been understood by these governors. In his speech to the DGEs at Anaheim the 2004-05 Chairman made the following comments: "We have heard rumors that these positions (referring to the DRFCC) will dilute the district governor's power. Let us remember one basic fact: In Rotary, there are no positions of power, not even in the top leadership. There are only positions with different degrees of responsibility. As district governor, you have great responsibilities, and you need the freedom to focus on your primary one - that of motivating Rotarians."

It may be helpful to explain to the district leadership that DDF is raised from the various clubs and Rotarians in the district and there should be a voice that represents more then the voice of a single individual on how those funds should be used. Therefore the intent of the Trustees is to have the District Rotary Foundation Committee make the DDF decisions with the DRFC chair providing the signature representing the committee's decision - all of this under the leadership of the district governor. By having the committee (of which the District Governor is a member) arrive at the decision, all constituents have representation in the decision. The Grants chair represents the donor who gave because he or she has an interest in the humanitarian work of Rotary. The Scholarship chair represents the donor who gave because he or she has an interest in the educational programs of Rotary. The GSE Chair represents the donor who gave because he or she has an interest in the GSE option... etc. The point is that those funds belong to the Rotarians of the district - not the governor or the DRFCC. Governors with good leadership skills should welcome a system that provides their constituents with a voice in the process of choosing how to use funds the constituents raised.

Your help as an RRFC is requested in working with district leadership to help convey this message where necessary. Should you have any questions, please contact Jon Stillman at <mailto:stillmaj@rotaryintl.org>.