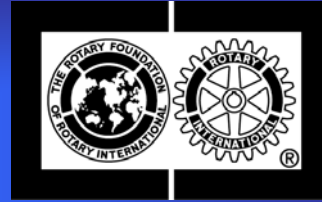


The Regional Rotary Foundation

COORDINATOR COMMUNIQUE



November 2004

A Forum for Foundation News

FUND DEVELOPMENT

Every Rotarian, Every Year

EREY Update

The new *Every Rotarian, Every Year* DVD (978-MU) is available in all Rotary languages in NTSC and PAL formats. A complimentary copy of the new DVD is being sent to all Rotary Senior Leaders and all District Governors. Copies will be available for sale from the Distribution Center (Warehouse Order Desk) and from the various RI Offices at a cost of US\$12. Your copy should arrive shortly.

A set of two new *Every Rotarian, Every Year* posters (959-MU) are now available at Rotary's Distribution Center and the RI Offices. Rotarians can order up to two sets of the posters gratis.

The November 2004 issue of the *Every Rotarian, Every Year* Newsletter is attached for your review. This issue and all other issues are available online. The direct link is: www.rotary.org/newsroom/downloadcenter/pdfs/erey_newsletter0411.pdf.



EREYNews-ENNov04.pdf
(double click icon above)

2005-2006 Club Success Kits will be sent to District Governors-elect for distribution to their club presidents-elect at PETS. The kit will include Rotary Foundation Sustaining Member Stickers for 2005-2006; a sample copy of the Club Goal Report Form; a new listing of What Your Contributions Can Do; examples of fundraising Success Stories and a copy of the *Every Rotarian, Every Year* brochure. The kits will be available in February 2005.

Contributions Update

	<u>October 2004</u>	<u>October 2003</u>	<u>Increase (Decrease)</u>
Annual Programs Fund	US\$14,916,354	US\$11,206,858	33.10%
PolioPlus	US\$ 4,268,310	US\$ 7,727,653	(44.77)%
Permanent Fund	US\$ 3,471,724	US\$ 2,636,293	31.69%
<u>Restricted Giving*</u>	<u>US\$ 2,903,280</u>	<u>US\$ 1,164,324</u>	<u>149.35%</u>
TOTALS	US\$25,559,668	US\$22,735,128	12.42%

The Rotary Foundation Ranks #96 of Top 400 Charities in the United States

Each year, *The Chronicle of Philanthropy* ranks the largest non-profit charities in the United States by how much money they raise from private sources. In fiscal year 2004, The Rotary Foundation of Rotary International ranked number 96 out of the top 400 charities studied. (Please note that in the United States, there are over 1.8 million charitable organizations. This study ranks only the Top 400 in the country.) This ranking is up from 173 of 400 in FY 2003. To obtain a copy of this report (available in English) by mail or fax, please contact Roylene Gallas, Director of Annual Giving at 1-847-866-3046 or by email at: gallasr@rotaryintl.org. Through the *Every Rotarian, Every Year* effort and achievement of our US\$100 million Annual Programs Fund goal, we hope to receive an even higher ranking in FY 2005.

Tax Receipts For 2004 Contributions

Contributions requiring 2004 tax receipts must be postmarked on or before 31 December 2004 and received by The Rotary Foundation no later than 6 January 2005. Any contributions postmarked after 31 December 2004 will receive 2005 tax receipts. Contributions should be sent to the appropriate Rotary International Office or designated fiscal agent. Please direct questions to the Development Services Department at 847-866-3000 or send an email to: everyrotarianeveryyear@rotaryintl.org.

Goal Setting Mailing To District Governors-elect 2005-2006

In preparation for the International Assembly, Frank Devlyn, Past RI President 2000-2001 and Trustee Chairman 2005-2006, is sending a draft sample of the 2005-2006 Club Goal Report Form at the end of November. Incoming governors-elect and club presidents-elect may seek your assistance in helping them set their Annual Programs Fund and Permanent Fund goals. The Club Goal Forms will be sent to the District Governors-elect immediately following the International Assembly and will be included in the PETS II Supplemental mailing. A draft copy of the 2005-2006 Club Goal Report Form and instructions are attached for your reference. Please do not distribute this to anyone and there may be more changes made to the form. Thank you.



2005-06TRFGolFormInstructionsFINAL.pdf

(double click icon above)

Permanent Fund Update

As of 30 October 2004, expectancies to the Permanent Fund stood at US\$278.1 million. The Fund's net assets were at US\$141.2 million as of 30 June 2004. The Permanent Fund goal is US\$500 million in net assets and expectancies by 30 June 2005.

Donor Advised Funds Update

As of 30 October 2004, there were 40 DAF accounts with a fair market value of US\$2.0 million. For additional information on The Rotary Foundation Donor Advised Fund, please visit <http://daf.rotary.org> Please see the DAF ad on page 39 of November's *Rotarian* magazine.

Year-end contributions to fund Life Income Agreements: Year-end contributions to fund Life Income Agreements need to reach TRF headquarters before the last few days of the year. Mutual fund transactions need to be started before November 29th and stocks should be in by December 15th, if possible. We will do everything possible to facilitate year-end gifts; your assistance in promoting early giving is greatly appreciated.

Bequest Society Update

As of 30 October 2004, there were 3945 Bequest Society commitments at an expected value of US\$166.2 million. These commitments represent a significant percentage of the expectancies to the Permanent Fund.



Paul G. Elder Estate Gift To The Rotary Foundation of Rotary International

The estate of Paul G. Elder provided \$ 7.5 million to The Rotary Foundation of Rotary International. This the largest contribution ever received by the Foundation by an individual. PDG Elder's bequest established several endowed funds named for PDG Elder and his wife Jean. The Elder Funds support a broad range of Foundation programs, including Ambassadorial Scholarships, Rotary World Peace Scholarships at the Rotary Centers for International Studies in Peace and Conflict Resolution, Humanitarian Programs, the Permanent Fund's Children's Fund, and PolioPlus.

PDG Elder joined the Rotary Club of Turtle Creek, PA, USA, in 1947. He served as Governor of District 7300 in 1956-57. He and his wife Jean embraced Rotary, and they were both life long enthusiasts of the Foundation's programs. The Elders were warm hosts to the many scholars and Group Study Exchange teams who visited District 7300. They continued contact with many of them long after they returned to their home countries. After Jean passed away in 1984, Paul continued to enhance his local and international community through Rotary until his own death in 1999. Before Paul passed away, he stated to his close Rotary friends, "***The Rotary Foundation can do more good with my money than anyone.***"

Throughout their lives, PDG Paul and Mrs. Elder were deeply connected to their international family of Rotary. Their generous gift will enable The Rotary Foundation to enhance children's health, scholar's minds, and families' lives around the world.

An Inspirational Story

This information was shared by our Sr. Annual Giving Officer, Susan Schwartzwald, in an email to her Foundation team.

Hi, team:

By now, you have all the Powerpoints, pamphlets, and program material put together for an outstanding **Every Rotarian, Every Year** presentation for Foundation month. All you need now is one more reminder, one more story (and one more email from me!!!) about how The Rotary Foundation is making a difference.

I have one for you! Katie Krueger served as an Ambassadorial Scholar in Dakar, Senegal 2003-2004, studying French and Wolof. She's enormously grateful to the Rotarians who made her trip possible.

“While I was there, two other scholars and I set up a Dakar Children's Scholarship Fund that raised enough money to start a school lunch program in a Dakar school. Because our initial appeal was so successful, we plan on continuing the program well into the future.

My favorite 'project' of my time in Senegal, was getting to know a village named Yayeme. There I was welcomed with limitless hospitality and given the occasion to see rural Senegalese life from the inside-out. Soon after my first return from Senegal, I submitted a story, "Wrapped Under the Mango Tree," about Yayeme that won a travel writing contest. I returned to Senegal to deliver the \$1,000 prize money which was used to build a toilet and well.

My experience as an Ambassadorial Scholar in Senegal challenged me to live and flourish in a culture that was far away from my comfort zone. Because of that, I got a glimpse of what I can do in difficult situations, and I have to admit I liked what I saw. I know that for years to come, you will be able to find a small piece of Rotary in each and every success that I have. Thanks a million for that.”

Katie already has accomplished what so many of us only dream of doing...taking the initiative to make our world better. Rotarians who learn about our programs and hear first-hand accounts from the people we benefit, will want to give. All we have to do is state the case, tell the story and ask. It makes a difference.

Thanks for all your help as always.

Susan Schwartzwald

PS. Katie is based in Madison, WI and is happy to speak at your meetings. Feel free to contact Katie directly with any questions, etc.

Katie Krueger: katiekrueger29@yahoo.com

HUMANITARIAN GRANTS PROGRAM

Reinstatement of 3-H Grants

At their October 2004 meeting, the Trustees agreed to lift the moratorium on new Health, Hunger and Humanity (3-H) grant applications and reinstate the grant type. The 3-H requirements have been updated to be more consistent with the Humanitarian Grants structure and to strengthen the sustainability of projects. Below is a summary of the updates that have been made to the program requirements:

- The primary host and international sponsor clubs/districts of a 3-H application must have successfully served as primary sponsors of a Matching Grant project within 5 years of submitting their 3-H application to be eligible for consideration. Sponsors must also be current on reporting for any previous 3-H or Matching Grant awards.
- Utilize an integrative approach that uses multiple program components to address humanitarian needs, including a combination of sustainable activities such as: training, community participation, Rotary Community Corps, capital assets, and technical expertise from Rotarian and non-Rotarian sources.
- Complete a community needs assessment that demonstrates local need and support from the local population for the project.
- Require 3-H Grant sponsors to provide a minimum contribution of 10% of the total 3-H grant award amount. (i.e. US \$30,000 contribution for a US \$300,000 grant award.)

The business cycle for 3-H grants has also changed. Grant decisions will be made on an annual basis according to the timeline below:

Date	Action
1 July – 31 March	Proposals for 3-H funding must be received by 31 March annually. Proposals will be reviewed by staff, those that demonstrate 3-H principles and meet program requirements will receive an application to be completed by the sponsors.*
1 Aug	Applications for consideration at the April trustee meeting must be received by 1 August annually.
1 Nov	Final deadline for sponsors to complete all application requirements.
30 Nov	Programs Committee of the Trustees selects 3-H applications to receive a site visit for consideration at the April meeting.
Dec-Feb	Advance Site Visitors visit project sites and report to the Trustees.
April	Funding decisions made by the Trustees and announced to project sponsors.

*The Rotary Foundation will begin accepting 3-H proposals for the 2005-06 Rotary year on 1 January 2005. The Rotary website will be updated by December with 3-H Proposal Guidelines and instructions for submission. Sponsors submitting proposals that demonstrate 3-H principles and meet the new program requirements will receive an application. Applications must then be received by 1 August 2005 for consideration at the April 2006 meeting.

EDUCATIONAL PROGRAMS

Rotary Centers for International Studies

Funding

As of 17 November 2004, TRF has secured sufficient funding to award at least 57 new Rotary World Peace Scholarships for the 2005-7 program year (Class IV). The Rotary Centers Committee, which meets in Evanston 29 November through 2 December 2004, will select the scholarship finalists for recommendation to the TRF Trustees. Two past RRFCs participate in the committee: Duane Sterling and Sakuji Tanaka.

TRF recognizes the following Rotary Centers Peacebuilder Districts, which has committed to donate US\$25,000 or more annually (or US\$50,000 every other year) to support the Rotary Centers program.

2590, 2600, 2650, 2660, 2700, 2730, 2750, 2770, 2780, 3640, 3650, 3660, 3670, 3750, 5170, 5180, 5300, 5330, 5650, 6060, 6980, 7690, 7710

Applications

TRF has received 165 endorsed applications to compete for up to 70 new Rotary World Peace Scholarships to be awarded for the 2005-07 program year. TRF recognizes the following RRFCs whose home districts submitted a Rotary World Peace Scholarship application to compete in the upcoming worldwide selection process. TRF would like to receive applications from all 529 districts annually. If RRFCs' home districts are not sending in applications, how can TRF expect other districts to submit applications? TRF encourages all RRFCs to ensure that their district - and every district in their region - submit qualified candidate's applications to TRF by 1 July 2005 for next year's competition. We particularly want to thank the following RRFCs for their support and for having their home districts submit candidates for the RWPS:

- Robert Brown
- John Butler
- Gustavo Gardebled
- David Groner
- Heimo Heikkilä
- Carolyn Jones
- John Reddish
- Andy Smallwood
- Anton Steer
- Gulam Vahanvaty
- Heather Yarker

Rotary World Peace Scholars and Center Director Speak at RI Day at the UN

Zewdineh Beyene, Rotary World Peace Scholar Alumnus (University of California at Berkeley, 2002-04) and Elisabeth Abeson, Rotary World Peace Scholar (International Christian University, 2003-05) spoke at the Rotary International Day at the United Nations in New York City on 6 November 2004. Ms. Abeson who is sponsored by District 7980 spoke about her research on International Corporate Responsibility and Mr.

Beyene, sponsored by District 9200, spoke about trying to fill the void of conflict resolution in Africa. Dr. Marianne Hanson, Rotary Center Director at the University of Queensland in Brisbane, Australia, highlighted the importance of the Rotary World Peace Program, especially in these times where peace-making skills are in such high demand throughout the world.

Ambassadorial Scholarships and Rotary Grants for University Teachers

Preparing and Hosting Ambassadorial Scholars - How RRFCs Can Help

Active and involved Rotarian host counselors ensure that Ambassadorial Scholars learn about their host countries and become involved in Rotary activities. As 2004-05 Ambassadorial Scholars assigned to study in the South Hemisphere prepare for February and March arrivals in their host countries, RRFCs are encouraged to work with districts to ensure that each scholar is assigned a host club and host counselor and that the counselors help scholars to balance ambassadorial and academic activities. At this time, some scholars starting between January and March have not yet been assigned host counselors, and the Scholarships Program Department staff will soon get in touch with the Host Districts to get those assignments. RRFCs will be copied on the email and faxed communications.

Mandatory Attendance at Scholar Orientation Seminars

For the second year, mandatory attendance at an outbound scholar orientation seminar is stressed in the following two letters from TRF:

- 1) Cover letter addressed to District Governors acknowledging receipt of the 2005-06 Scholarship Applications from their districts;
- 2) Assignment letters sent to 2005-06 Ambassadorial Scholars.
Sponsor Districts and recipients of these letters are referred to the following link for an updated list of 2004-05 Regional Scholar Orientation Seminars:
<http://www.rotary.org/foundation/educational/amb_scho/seminars.html>

2005-06 Applications and Study Institution Assignments

The deadline for receipt of all 2005-06 Ambassadorial Scholarship and Rotary Grants for University Teachers applications was 1 October 2004. Scholarship/grant recipients will be notified of their study institution assignments by 15 December 2004, provided that the applications were received by the 1 October deadline. Although every attempt is made to assign scholars to their first choice study institution, this is not always possible. In making study institutions assignments, TRF aims to fulfill the program goal of *impacting all areas of the world with a balanced geographic distribution of scholars*.

2005-06 Ambassadorial Scholarships and Replacement Candidates

The deadline for districts to submit applications for replacement candidates for scholars who have withdrawn their 2005-06 Rotary Foundation Ambassadorial Scholarships is **1 February 2005**.

Scholarships Fund Pool for Low-Income Countries

The table below lists the districts/countries that submitted applications to TRF as of 15 November 2004 to compete for 2005-06 Ambassadorial Scholarships available through the Scholarships Fund Pool for Low-Income Countries. The Scholarships Fund Pool for Low-Income Countries Selection Committee meets in Evanston 1-2 December to select

the finalists to be recommended for up to 20 scholarships. Three past RRFs serve on the committee: Marcus Doyle (chairman), David Liddiatt, and P.T. Prabhakar.

D-1430 Russia	D-4150 Mexico	D-4850 Argentina	D-9320 South Africa
D-2240 Czech Republic	D-4240 Chile	D-4860 Argentina	D-9350 South Africa
D-2370 Russia	D-4300 Peru	D-4890 Argentina	D-9600 Papua New Guinea
D-2420 Turkey	D-4320 Chile	D-4910 Argentina	Non-districted Rotary Club of Bishkek, Kyrgyzstan
D-2430 Turkey	D-4340 Chile	D-4920 Argentina	Non-districted Rotary Club of Almaty, Kazakhstan
D-2450 Egypt	D-4390 Brazil	D-4960 Argentina	Non-districted Rotary Club of Baku, Azerbaijan
D-3100 India	D-4450 Peru	D-4970 Uruguay	Non-districted Rotary Club of Tbilisi, Republic of Georgia
D-2750 Palau	D-4460 Peru	D-4980 Uruguay	
D-3140 India	D-4530 Brazil	D-5010 Russia	
D-3270 Pakistan	D-4620 Brazil	D-7030 Barbados	
D-3280 Bangladesh	D-4660 Brazil	D-9110 Nigeria	
D-3310 Malaysia	D-4670 Brazil	D-9140 Nigeria	
D-3350 Thailand	D-4720 Brazil	D-9200 Tanzania	
D-3360 Thailand	D-4810 Argentina	D-9210 Mozambique	
D-3770 Philippines	D-4820 Argentina	D-9250 South Africa	
D-3820 Philippines	D-4830 Argentina	D-9270 South Africa	

Group Study Exchange

World Fund GSE Team Awards Reinstated Every Year

At their October 2004 meeting, the Trustees rescinded their decision of April 2001 in which districts could apply for World Fund Awards to send Group Study Exchange (GSE) Teams every two years. Based on the financial status of the World Fund pool at this time, all districts in good standing are eligible to apply for World Fund Awards to send a GSE Team every year. The GSE program will return to an annual cycle in which exchanges are carried out in one program year. **All changes are in effect starting with the 2005-06 program year.**

As a result of these changes, the Foundation has made a one-time exception to postpone the 2005-06 GSE District Application submission date until **1 March 2005**. All DGEs have received instructions on how to proceed with their 2005-06 GSE District Application. GSE pairings will be confirmed by regular mail on a rolling basis up until 1 March 2005.

In order to help preserve the World Fund for other educational and humanitarian grant programs of the Foundation, the Trustees continue to encourage districts to utilize District Designated Funds (DDF) to send GSE teams. Districts retain the option of using DDF instead of World Fund Awards to send a GSE team in any given program year (USD \$11,000 for a standard GSE team, USD \$6,000 for a neighboring country GSE team). **Districts may apply to send a maximum of two GSE teams during a given**

program year: only one can be financed through the World Fund, the other must be funded through DDF, a DDF donation from a partner district, or a restricted gift to the Permanent Fund.

Looking for a GSE Partner for 2005-06?

If districts are looking for a pair for the 2005-06 program year and have not been successful in contacting anyone, the Foundation will be happy to find a partner for them. Districts should submit 2005-06 GSE District Applications to the Foundation immediately. Earlier submission provides a larger pairing pool for GSE partnerships. Districts that submit a 2005-06 GSE Application before **15 December 2004** will be notified by regular mail of their GSE pairing prior to the International Assembly in February 2005. Others will be notified on site in Anaheim or contacted separately.

PLANNING & ADMINISTRATION

Coming soon...

The Planning and Administration Division is developing basic “courses” on The Rotary Foundation called e-learning modules. The modules are Powerpoint slide shows that the viewer controls by clicking on forward and back arrows. They include a fun “test” at the end to see how much you know about TRF. These shows are being designed to help inform Rotarians about The Rotary Foundation. We will be sending you these e-learning Powerpoints in the next few weeks and asking for your feedback and suggestions. It’s all part of preparing you for the upcoming March Training meeting, and to give you a tool to help train Rotarians in your areas about The Rotary Foundation.

“What the Rotary Foundation Means to Me”

Current and Incoming RRFCS are asked to tell us in 50 words or less “What The Rotary Foundation Means to Me”. RRFIC Institute Moderator Lou Piconi wants to include your comments in the next RRFIC Biography book!

Past RRFCS: You too are encouraged to send in a 50-word essay on “What The Rotary Foundation Means to Me.” Trustee Chairman-elect Frank Devlyn would like to collect your thoughts on TRF to better promote the value of TRF to Rotarians.

Please send your submissions to either Melanie Davis (Davisme@rotaryintl.org) or Matt Hohmann (HohmannM@rotaryintl.org).