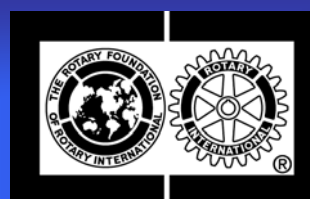


# The Regional Rotary Foundation

## COORDINATOR COMMUNIQUÉ



May 2005

*A Forum for Foundation News*

### FUND DEVELOPMENT

For the ten months ending 30 April 2005, contributions to The Rotary Foundation totaled US\$93,537,908, an increase of 20% over last year. Of that amount, Annual Programs Fund contributions totaled US\$58,849,372, an increase of nearly 28% over last year's giving. This represents a goal achievement of only 59% against our worldwide annual giving goal of US\$100,000,000 with less than two months remaining in the Rotary year. In order to achieve our Centennial goal of US\$100 per capita, total giving must increase by 40% over last year's total annual giving of US\$70 million. Contributions to the Permanent Fund are ahead of 2003-2004 by 14.36%. Pledge payments for the Polio Eradication Fundraising Campaign continue to come in, all of which are payable by 30 June 2005. Contributions to Tsunami Relief efforts represent the increase in Restricted giving at 158%.

	<u>April 2005</u>	<u>April 2004</u>	<u>Increase (Decrease)</u>
Annual Programs Fund	US\$58,849,372	US\$46,201,420	27.38%
PolioPlus	US\$13,557,913	US\$19,622,412	(30.91%)
Permanent Fund	US\$ 7,984,873	US\$ 6,982,160	14.36%
<u>Restricted Giving</u>	<u>US\$13,145,750</u>	<u>US\$ 5,096,917</u>	<u>157.92%</u>
<b>TOTALS</b>	<b>US\$93,537,908</b>	<b>US\$77,902,909</b>	<b>20.07%</b>

#### Permanent Fund Update

As of 30 April 2005, expectancies to the Permanent Fund stood at US\$292.4 million. The Fund's net assets were US\$158.1 million as of 31 March 2005. The Permanent Fund goal is US\$500 million in net assets and expectancies by 30 June 2005.

#### Bequest Society Update

As of 30 April 2005, there were 4244 Bequest Society commitments at an expected value of US\$178 million. These commitments represent a significant percentage of the expectancies to the Permanent Fund.

#### Donor Advised Fund Update

As of 30 April 2005, there were 53 DAF accounts with a fair market value of US\$2.5 million. For additional information on The Rotary Foundation Donor Advised Fund, please visit <http://daf.rotary.org>.

## HUMANITARIAN GRANTS PROGRAM

### Recent Changes to the Humanitarian Grants Program

RRFCs recently received a handout explaining recent changes to the Humanitarian Grants Program via email. In order to facilitate explanation of these changes to Rotarians around the world, the following information provides a rationale for these changes.



Microsoft Word  
Document

The Trustees have initiated a strategic planning process that will provide a vision for the next 100 years of service for the Foundation. During this planning process, changes were necessary to ensure that adequate resources are available to support the strategic planning endeavor. The decisions to place a moratorium on Individual Grants and establish a US\$5,000 minimum for Matching Grant awards were based upon a careful assessment (including the use of an outside consultant) of the resources required to support Humanitarian Grants and their effective use. During the planning process, The Rotary Foundation will assess how it can effectively and efficiently support humanitarian endeavors in the 21<sup>st</sup> Century and determine how Individual Grants and Matching Grants are best able to achieve the TRF Vision for the Future.

The Trustees have also focused much of their time and energy on stewardship of grant funds. After conducting several stewardship seminars and evaluating the support The Rotary Foundation provides to Rotary clubs and districts participating in Humanitarian Grants, the trustees agreed to make a number of policy changes that should increase transparency, improve the quality of grant reports, and allow the Foundation to act quickly to address issues and concerns. These changes will be phased in during the 2005-06 Rotary year.

## EDUCATIONAL PROGRAMS

### **Rotary Centers for International Studies in Peace and Conflict Resolution**

#### *Congratulations!*

The Rotary Foundation congratulates the Class II Rotary World Peace Fellows who are graduating from the five Rotary Centers located in the Northern Hemisphere. The graduates' names, profiles, and employment can be found on the R.I. Website at: [http://www.rotary.org/foundation/educational/amb\\_scho/centers/scholars/2003/index.html](http://www.rotary.org/foundation/educational/amb_scho/centers/scholars/2003/index.html).

#### *Annual Seminars Address Varied Aspects of Peace*

Four of the seven Rotary Centers have held or will soon be holding their Rotary Annual Seminar. Each university will organize an annual seminar at which Rotary Scholars and others, including former Rotary Scholars still in residence at the university, present research papers and discuss issues related to peace, goodwill, and world understanding.

These seminars will be reported to The Rotary Foundation and in international media.



SCIENCES PO

Annual seminars have taken place at Duke University/University of North Carolina (April 16) and University of California, Berkeley (April 10). At Duke/UNC the seminar was entitled, “Building Sustainable Development and Enduring Peace.” Presentations from the Fellows included topics ranging from education and the development of democratic societies, to the use of conflict resolution tools in resolving internal revolutions and intrastate episodes in South America, to diagnosing the causes of the perplexing conflict in Sudan. These diverse topics stretching the globe were presented to an audience of students, faculty, administrators and Rotarians. At the University of California, Berkeley, the Fellows spoke about their current research and introduced themselves to the audience of approximately 150 Rotarians and members of the university community.

The Annual seminars at International Christian University and Sciences Po will take place on May 28<sup>th</sup> and 30<sup>th</sup> respectively. The title of the ICU Seminar is “The Evolving Concept of Human Security—Building Peace in the 21<sup>st</sup> Century.” Fellow panelists will present work on *Regional Dimensions of Human Security*, *Dialogues and Human Security*, and *Grass Roots Approaches to Human Security*. At Sciences Po, the seminar is entitled, “Une journée sur la paix” (A Day About Peace). The new Center Director, Ms. Shahrbanou Tadjbakhsh, will introduce the seminar that will include two guest speakers, Patrick Messerlin, Professor of Economics at Sciences Po, and Alain Deletroz, Vice-President of Operations at International Crisis Group.

All papers from the Annual Seminars will be available on the Rotary Centers website.

#### **TRF Seminars at 2005 Zone Institutes**

Have you invited a Rotary World Peace Fellow or Alumnus to address your TRF Seminar later this calendar year? If not, we encourage you to do so and are prepared to provide suggestions and contact information for Rotary World Peace Fellows located in your region. Please email Judy Gibson, Rotary Centers Department Manager, at [gibsonj@rotaryintl.org](mailto:gibsonj@rotaryintl.org).

#### **Trustees Conduct Preliminary Program Review**

At their April 2005 meeting, the TRF Trustees looked with favor upon the employment being secured by the Rotary World Peace Fellow graduates, and agreed to extend the contracts with the Rotary Center partner universities for two additional classes of Rotary World Peace Fellows (2007-09 and 2008-2010 program years, or Classes VI and VII), with additional extensions to be considered at their April 2007 meeting. Due to the slower than anticipated pace in securing Rotary World Peace Fellowship endowment gifts created by The Rotary Foundation’s recent focus of fundraising efforts for the successful 2004-05 Private Sector Polio Eradication Fundraising Campaign, the Trustees

agreed to reduce the number of new Rotary World Peace Fellowships awarded annually from up to 70 to up to 60 effective with the 2007-09 program year and request the general secretary to negotiate extended contracts with just six of the seven partner universities. The Trustees requested the general secretary to develop a renewed plan for fund development efforts to secure endowed gifts to provide Rotary World Peace Fellowships in the long term.

### **Peace Fellows at the Convention**

An “all star team” of seven Rotary World Peace Fellow Alumni, one from each center and two Rotary Center Directors, will be at the 2005 R.I. Convention in Chicago to personally thank Rotarians for their support, promote the program, and discuss topics related to conflict prevention and resolution. Please make a point to visit with them at the R.I. secretariat Service Booth, or attend the Rotary Centers Workshop on Tuesday afternoon, 21 June.

## **ROTARY PEACE AND CONFLICT STUDIES**

### ***Pilot Program Takes Shape***



Implementation of the pilot Rotary Peace and Conflict Studies short-term certificate program is well underway, with staff being hired at The Rotary Foundation and the partner university that will host the center, Chulalongkorn University in Bangkok. Not to be confused with the 1 to 2-year master’s degree program known as the Rotary Centers for International Studies in peace and conflict resolution program, the new Rotary Peace and Conflict Studies program will feature a 3-month course at a relatively low cost. TRF expects to mail fellowship application forms to all District Foundation Committee Chairs by August 2005, with copies to the RRFCs. All applications will be considered on a world-competitive basis by a Trustee-appointed selection committee, which includes as one of its members Past RRFC Duane Sterling. To learn more, visit the R.I. Website at: <http://www.rotary.org/foundation/educational/rpcsp/index.html>. Questions can be emailed to Tammy Chiemmongkoltip, Rotary Peace and Conflict Studies Department Manager, at [chiemmot@rotaryintl.org](mailto:chiemmot@rotaryintl.org).

## **Ambassadorial Scholarships and Rotary Grants For University Teachers**

### **Host Counselors Appointments**

15 June 2005 is the deadline for districts to notify TRF of host counselor assignments for 2005-06 Ambassadorial Scholars and University Teachers. Like last year, 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](mailto:scholarshipinquiries@rotaryintl.org)

### **Regional Scholar Orientation Seminars**

Thanks to Regional Scholar Orientation Seminars held throughout the Rotary world. In 2004-2005 approximately 700 Ambassadorial Scholars, Rotary World Peace Fellows, and University Teachers had, and still have, 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 6th year, the Trustees have offered grants to defray the costs of large-scale, multi-district seminars. Nearly US\$109,000 was awarded to 23 seminars in 2004-05. Since outbound orientation is mandatory for all Ambassadorial Scholars, the importance of these regional seminars has continued to grow.

After receiving the evaluation of Regional Scholar Orientation Seminars at their April 2005 meeting, the Trustees approved an increase in the 2005-06 World Fund program awards budget from US\$100,000 to US\$150,000 to support the growing number of Regional Scholar Seminar Grants. We are currently working with districts in the Pacific Northwest and the West of United States, Brazil and Italy, involving RI regional offices where possible, to help them start (or resume) organizing a seminar for 2005-06. The Trustees also confirmed that Regional Scholar Seminar Organizers may use the grants to help cover the travel expenses of program participants, agreed that the maximum Regional Scholar Seminar grant amount will be of US\$350 per program participant attending, and required that in order to be eligible for a grant, Regional Scholar Orientation organizers must involve a minimum of ten educational program alumni and ten Rotarian sponsor counselors.

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

### **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. All districts and non-districted clubs in low-income countries may submit **1** scholarship candidate application to compete for up to **32** Ambassadorial Scholarships awarded annually through the fund pool. All applications are considered on a world-competitive basis by a Trustee-appointed selection committee chaired by past RRFC Marcus Doyle, and includes as its members Past RRFC's David Liddiatt, P.T. Prabhakar, and Jesse Devlyn. The deadline to submit 2006-07 applications to TRF is **1 October 2005**.

### **Donated 2006-07 Scholarships**

Districts that are recipients of donated 2006-07 Ambassadorial Scholarships were sent notification from TRF in April 2005. 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 these two applications by 1 September 2005 to the donating district for final review and selection. The donating district should then send the finalist's application to TRF by **1 October 2005**.

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](mailto:stephenr@rotaryintl.org), telephone: +1/847-866-3314, or fax: +1/847-866-0934.

## **Group Study Exchange**

### **2005 International Convention in Chicago**

In promoting TRF's educational programs at the 2005 RI Convention, we ask RRFs to encourage participation in the workshop entitled "Creating rewarding vocational Group Study Exchanges." The workshop will be held on **Tuesday afternoon, 21 June 2005, from 1630-1800 hours** with facilitator Trustee Kalyan Banerjee and a panel of Rotarians involved in successful GSEs.

### **2006-07 GSE Pairings**

2006-07 District Governors should be well on their way in looking for GSE partners for the 2006-07 program year. All GSE district applications will be sent to the 2006-07 Governors towards the **end of June 2005**. Completed GSE district applications for the 2006-07 program year are due back to TRF by **1 October 2005**. In addition, GSE district applications and other forms and information will be available for download on the TRF website. If districts need help obtaining contact information for another district, they should contact their GSE coordinator at TRF for assistance.

All districts are eligible to send one GSE team through a World Fund Award in the 2006-07 program year. An additional GSE team may be funded by DDF (in the amount of \$11,000 USD (\$6,000 USD for neighboring country GSE). Districts must submit separate GSE district applications for each GSE team they wish to send, and must confirm that DDF is available if applying for a second GSE team.

### **Year-End Details**

Please remind GSE sub-committees that requests for all GSE reimbursements from the 2004-05 year should be sent to the GSE department of TRF within two months of expenditures. In addition, please be advised that payments are sent within 15 to 20 business days from the day they are submitted. Reimbursement forms are available in the GSE Program Guide for Rotarians – Pub.165 (available for download at <http://www.rotary.org/newsroom/downloadcenter/foundation/educational.html>).

GSE team reports should also be sent within the two-month time frame. A GSE final report is found in both the GSE Program Guide for Rotarians as well as the GSE Team Handbook – Pub. 164 (also available for download at the above web page). These 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. In addition, we ask that the teams include pictures and potential public relations stories to be placed on the GSE website. It is mandatory that teams submit their final reports to GSE staff at TRF in order to finalize the GSE.

## **POLIOPLUS**

### **Polio Exhibit at the Smithsonian Institute**

On 12 April 2005, the Smithsonian Institute in Washington, D.C., USA opened an Exhibit, "Whatever Happened to Polio?" tracing the course of the disease from its beginnings to the current state of the disease. Please visit the Smithsonian website <http://americanhistory.si.edu/polio> for a web-version of the exhibit. The fourth segment, "Polio Today" features Rotary's work on the global polio eradication effort. We encourage you to tell Rotarians about the exhibit and encourage them to take the time to see it if they will be in the Washington D.C. area.

### **Polio Eradication Champion Awards Presented at Congressional Reception**

The Honorable Julie L. Gerberding, Director, US Centers for Disease Control and Prevention, and the Honorable Andrew S. Natsios, Administrator, United States Agency for International Development, were presented Polio Eradication Champion awards by President Glenn Estess, Sr. at the Capitol Hill reception honoring US Champions of Polio Eradication on 11 May, 2005.

Under Dr. Gerberding's leadership, the CDC, a spearheading partner with RI in the initiative, has provided crucial technical and financial support. Dr. Gerberding's recent travels to the polio strongholds of India, Pakistan, and Afghanistan have encouraged her counterparts in those countries to intensify their efforts against polio.

Natsios was recognized for his commitment to eradicating polio. Under his leadership, USAID provided crucial support for the synchronized polio immunization campaigns in 23 west and central African countries this year and in 2004, including critical work to reach children in the previously inaccessible areas of Darfur, Sudan, and northern Nigeria.

### **Polio Eradication Fundraising Campaign – 2 Months To Go**

Only 2 months remain for clubs to complete their commitments to the Polio Eradication Fundraising Campaign. Although the campaign has been successful in raising over US\$123 million, more funds will be needed to address the outbreak in Africa that originated in Nigeria. All clubs should be encouraged to complete their PEFC commitments. For clubs that have completed their commitments and would like to address current needs, they should be encouraged to contribute to PolioPlus Partners where their contribution will be matched at the rate of \$.50 per every dollar donated. More information and an Open Projects List can be found at <http://www.rotary.org/foundation/polioplus/partners/about.html>.

## PLANNING & ADMINISTRATION

### *A Picture is Worth a Thousand Words*



Photograph By: Mark Pearson 15/04/2005  
Medan, Sumatra. 102 tonnes of Shelterboxes arrive in Polonia airport on an Anatov 124 aircraft for delivery to Oxfam for the Tsunami and most recently the earthquake victims in Nias and Aceh provinces in the Indonesian island of Sumatra.

### **This information was shared by our RRFC John Smarge-Zone 34:**

*They say a picture is worth a thousand words. This one is worth a 2000 boxes. It is awesome. This represents the last shipment of Shelter Boxes into the tsunami stricken area of southeast Asia. With more than 13,000 tents shipped (and 10,000 complete boxes) Shelter Box has provided shelter, comfort and warmth to more than 130,000 displaced people. We should all be proud of having played a significant part in this incredible Rotarian grass-roots project. But our work goes on. **The Need Exists. The Need Persists...***

***For more information about Shelter Boxes, go to***  
<http://www.shelterboxusa.org/shelterbox.aspx>

### **Presentation on “The Finances of The Rotary Foundation**

Below is a letter from Peter DeBerge, CFO of Rotary International, which was recently sent to current and incoming Trustees regarding “The Finances of The Rotary Foundation”.

*To The Trustees and Incoming Trustees of The Rotary Foundation,*

*During the past several months, we have been preparing a financial presentation on "The Finances of The Rotary Foundation". It was first presented at the RRFC Institute in March 2005 and subsequently presented to both the TRF and the RI Finance Committees.*

*Attached is Power Point file with the presentation as of 6 May 2005, reflecting changes suggested by each audience.*



TRF Finance  
resentation-6May0..

*Although the presentation includes many slides previously seen and included in the Foundation's 2003-04 Annual Report, it includes expanded analysis of TRF's expenses, especially Fund Development expenses. Also, the last section, "Frequently Asked Questions", attempts to answer some of the frequently asked questions you receive about TRF's finances.*

*We appreciate any feedback and suggestions you have to improve this information and to answer any other financial questions that Rotarians are asking you. We will continue to improve this analysis and communications to Rotarians, including a Finance Forum at the International Convention on 21 June.*

*Thank you for your interest and support in this effort.*

*Pete*