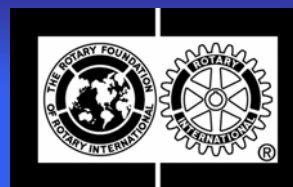


The Regional Rotary Foundation

COORDINATOR COMMUNIQUE



June/July 2005
SPECIAL EDITION

A Forum for Foundation News

FUND DEVELOPMENT

Interim 30 June 2005 Contributions Update

The 2004-2005 Centennial year was a banner year for fundraising for the Annual Programs Fund. The interim figures for contributions to The Rotary Foundation for the year ended 30 June 2005 totaled US\$129,993,832. This figure represents an overall increase of 13.20% over the previous Rotary year. While contributions to the Annual Programs Fund were up 20% to US\$83,496,286 – our highest annual giving totals in Foundation history -- we did fall short of our US\$100,000,000 Centennial worldwide goal. Permanent Fund giving remained steady down slightly by -0.53% to US\$9,838,880. PolioPlus received the final commitments on club pledges to achieve US\$18,888,338. Restricted giving, including contributions to the Solidarity in Southeast Asia Fund, increased 109% to US\$17,770,328.

	<u>June 2005</u>	<u>June 2004</u>	<u>Increase (Decrease)</u>
Annual Programs Fund	US\$ 83,496,286	US\$ 69,577,499	20.00%
PolioPlus	US\$ 18,888,338	US\$ 26,861,495	(29.68%)
Permanent Fund	US\$ 9,838,880	US\$ 9,891,792	(0.53%)
Restricted Giving	<u>US\$ 17,770,328</u>	<u>US\$ 8,502,566</u>	<u>109.00%</u>
TOTALS	US\$129,993,832	US\$114,833,352	13.20%

These totals represent the second highest contribution totals in the Foundation's history. You may recall that in 2002-2003, we raised over US\$141 million in overall contributions during the Polio Eradication Fundraising Campaign.

Changes in Banner Recognition for 2005-2006

Effective 1 July 2005, clubs can work toward becoming an "Every Rotarian, Every Year Club" and receive banner recognition for achieving US\$100 per capita in which every member contributes something to the Annual Programs Fund. This new annual banner recognition will be awarded following the close of the 30 June 2006 books. As soon as a design for this banner has been approved, we will share it with you.

Effective 1 July 2005, the Foundation will no longer award banners for the Top Three in Highest Annual Giving in the District. Banners for the Top Three in Per Capita Giving per district will still be awarded, but to qualify a club must achieve a minimum US\$50 per capita in giving to the Annual Programs Fund. Those banners are awarded following the close of the 30 June books.

Senior Volunteer Contact Information Letter

In mid-July, Trustee Chairman Frank Devlyn sent a letter to all District Governors, District Governor-elects and District Rotary Foundation Chairs providing them with the contact information for the Regional Rotary Foundation Coordinators, Major Gift Advisors and Annual Programs Fund Strategic Advisors in their zones. A copy of this letter and volunteer contact information is being sent to all RRFCs in a separate mailing.

2005-2006 Fund Development Club Goal Report Form

As of 30 June 2005, a total of 17,175 clubs out of 32,664 submitted annual giving goals totaling US\$63,895,697.00. Please encourage clubs that have not yet submitted their goals to fax them to 847-328-5260 or email them to everyrotarianeveryyear@rotaryintl.org.

Permanent Fund Update

As of 31 May 2005, expectancies to the Permanent Fund stood at US\$296.3 million. **The Fund's net assets were US\$154.9 million as of 30 April 2005.** The Permanent Fund goal is US\$500 million in net assets and expectancies by 30 June 2005.

Bequest Society Update

As of 31 May 2005, there were 4315 Bequest Society commitments at an expected value of US\$181 million. These commitments represent a significant percentage of the expectancies to the Permanent Fund.

Donor Advised Fund Update

As of 31 May 2005, there were 54 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>.

Change in Title and Role of Permanent Fund National Advisor

Seeking major gifts to the Permanent Fund, the Trustees launched the Permanent Fund Initiative in October 1992. This effort promoted gifts in the form of outright contributions life income agreements, bequests and life insurance. After the introduction of the Permanent Fund Advisors outside North America, it was observed that the title no longer described the roles that these advisors assumed, and that many zones contained more than one nation. In fact, major gifts are routinely sought and received for the Annual Programs Fund and other causes, like PolioPlus.

During the April 2005 Trustee meeting, the Trustees agreed to change the title of Permanent Fund National Advisor to Major Gifts Advisor, effective 1 July 2005. They also adopted the revised terms of reference for the Major Gifts Advisor provided below. The terms of reference clearly delineates that Major Gifts Advisors report to a RRFC.

Terms of Reference for Major Gifts Advisor

The Major Gifts Advisor is responsible for promoting and supporting the solicitation of major gifts of US\$10,000 or more to The Rotary Foundation in assigned territories. In both number and dollar value, the Permanent Fund receives more major gifts than other designations. Major gifts, however, are also routinely made to the Annual Programs Fund and other causes, like PolioPlus. Major gifts are an integral component of a successful fund development effort.

The Major Gifts Advisor reports to a Regional Rotary Foundation Coordinator (RRFC) and provides a communication link between Annual Programs Fund Strategic Advisors, district leadership (District Governors, District Governors-elect, Assistant Governors, District Rotary Foundation Committee Chairs, Annual Giving Subcommittee Chairs, and Planned and Major Gifts Subcommittee Chairs), and Rotary Foundation staff for purposes of major gift fundraising.

The term of appointment for each Major Gifts Advisor shall be three years, subject to an annual performance review. The Trustee Chair, in consultation with the Trustee Chair-elect, makes any new appointments.

Under the leadership of the RRFC, the Major Gifts Advisor shall:

1. lead by example through a major gift, Bequest Society commitment, and/or Benefactor commitment to the Foundation, according to his or her own financial capacity;
2. assist RRFCs in promoting major gifts, Bequest Society and Benefactor commitments at Rotary Institutes, President-Elect Training Seminars, Foundation Seminars, and other Rotary events as requested;
3. train and work closely with district leadership on an ongoing basis to support their major gifts, Bequest Society and Benefactor promotion. Specifically,
 - a. promote the *Two Needs, Two Ways of Giving* message at club, district and zone meetings;
 - b. assist clubs and districts in setting enhanced fund development goals, submitting these goals to the Foundation, and providing strategies for goal achievement;
 - c. encourage clubs and districts to develop and maintain strong fundraising committees to establish and exceed goals;
 - d. seek at least one major gift to the Annual Programs Fund per district in conjunction with district leadership and the Annual Programs Fund Strategic Advisor;
 - e. encourage districts to identify, cultivate, and solicit at least twelve major gift prospects every year;
 - f. plan cultivation and stewardship events for important Foundation supporters;
4. personally identify, cultivate and solicit major gifts, with an emphasis on gifts of US\$25,000 or more;
5. monitor monthly fundraising progress in assigned territories and provide support and strategies to clubs and districts in meeting or exceeding established goals;
6. provide regular progress reports to RRFCs and Foundation staff as requested.

(Source: April 2005 Trustees Mtg., Dec. 105)

HUMANITARIAN GRANTS PROGRAM

Program Updates

Matching Grants

In the 4th Quarter, TRF approved 1,102 grants which represents 48% of the grants approved in the 2004-05 Rotary Year.

3H Grants

TRF received a total of 46 proposals for 3-H grants by the extended 30 June deadline. The requests for consideration at the April 2006 meeting total over US\$11 million; only US\$3 million has been budgeted for these competitive grants.

District Simplified Grants

While the majority of DSG requests were approved, 78 DSG requests were received but not approved during the 2004-05 Rotary year. Requirements that caused pending DSGs not to be approved include:

- Lack of reporting on 2003-04 and 2004-05 DSGs
- Insufficient DDF
- Incorrect authorizations
- Submission after 31 March 2005

Individual Grants

Due to the moratorium on Individual Grants, TRF has received a significant response to the 30 June deadline for applications. Approximately 225 were received during the fourth quarter, which represents 39% of the total applications received in 2004-05. Applications received in the fourth quarter are requesting US\$946,000 in funding, which represents 45% of the total amount requested for Individual Grants in 2004-05. The current pending requests exceed the remaining funds available for the program. The Carl P. Miller budget has been expended for the year.

EDUCATIONAL PROGRAMS

New Program!

Rotary Centers For Peace and Conflict Studies

The Rotary Center for Peace and Conflict Studies is officially kicking off its inaugural publicity campaign and call for applications. The Rotary Peace and Conflict Studies Program is a one of a kind short-term certificate program consisting of two sessions annually of thirty fellows per session. Sessions are conducted in English and take place from July-September and January-April at the Rotary Center for Peace and Conflict Studies at Chulalongkorn University, Bangkok, Thailand. Each district may submit as many candidates as they deem qualified for the 2006-07 Rotary Peace and Conflict Studies Fellowship world competition, regardless of the district funds available to sponsor fellowships. The program is especially targeted towards candidates who have demonstrated a commitment to world peace and conflict resolution and who are currently employed with 5-10 years of professional experience in a field that utilizes conflict resolution strategies. The deadline for submission of candidates from the districts is 15 January 2006. Districts should plan to conduct candidate interviews in October, November, and December of this year. This program will ultimately be funded from District Designated Funds. The Trustees have generously funded the first year of the program from the World Fund. For more information, please refer to the Rotary International website at:

<http://www.rotary.org/foundation/educational/rpcs/index.html> or email Jennifer Weidman, the Rotary Peace and Conflict Studies Program Coordinator, at weidmanj@rotaryintl.org.



Rotary Peace and Conflict Studies Brochure

Peace and Conflict Studies at the Centennial Convention

Dr. Puntip Sirivunnabood attended Rotary's Centennial Convention in Chicago to promote awareness and support of the new Rotary Center for Peace and Conflict Studies at Chulalongkorn University in Bangkok, Thailand. Professor Puntip helped staff the TRF exhibit booth and attended TRF events and functions during what proved to be a very successful and highly rewarding trip.

Rotary Centers for International Studies

Rotary World Peace Fellows Participate in the 2005 Rotary International Convention

Seven Rotary World Peace Fellows and two Rotary Center Directors attended the 2005 Rotary International Convention in Chicago. Marianne Hanson and Ed Esptein, Center Directors from The University of Queensland and The University of California at Berkeley, respectively, attended together with Rotary World Peace Fellow Alumni, Mitch O'Brien (University of Queensland), Margaret Soo (International Christian University), Anna Pehrsson, (Universidad del Salvador), Arnoldas Pranckevicius (Sciences Po), Ximena Valente Hervier (The University of Bradford) and Nani Mahanta (The University of California at Berkeley). The Fellows and Directors participated in a TRF workshop highlighting the ways in which alumni are using the Rotary World Peace Fellowship and their experiences in their current jobs and professional lives. Each participant spoke to the importance of the fellowship in helping them obtain their jobs and more generally how the Rotary Centers program has helped them in carrying out their duties. The Fellows have secured positions ranging from an advisor to the President of Lithuania, to an attorney working in the International Criminal Tribunal for the Former Yugoslavia in The Hague, to a training officer in conflict prevention for international cooperation agencies, to a Fellow who is setting up an Institute at his university that encourages dialogue between fighting communities in South Asia. It was a great day for the Rotary Centers program and for the nearly 150 workshop attendees.

Rotary World Peace Fellows at the 2005 International Rotary Convention



left to right: Nani Mahanta, Margaret Soo, Francesca Del Mese, Ximena Valente Hervier, Arnolda Pranckevicius, Anna Pehrsson and Mitch O'Brien

Graduations and Applied Field Experiences at ICU and Sciences Po

The Class II Rotary World Peace Fellows from ICU graduated with their Masters in Public Administration degrees in June, and the fellows at the Rotary Center at Sciences Po will graduate with their Masters in International Affairs in mid-July. Several of the Class III fellows from the two centers will engage in exciting and challenging Applied Field Experiences this summer. Five fellows will participate in the IIMCR (Institute for International Mediation and Conflict Resolution) symposium in Prague, Czech Republic, in July and August. Also, one fellow from each center will be interning at the U.S. embassies in Tokyo and Paris, respectively. Other field experiences will include an internship with the OSCE (Organization for Security and Cooperation in Europe) office in Vienna, and another with a micro lending agency for developing countries at its main headquarters in New York.

New Jobs for Peace Fellow Alums

Helga Bara Bragadottir, (University of Bradford) recently was assigned by the United Nations Development Program (UNDP) as a Junior Professional Office based in Angola.

Michel Huneault (UC-Berkeley) recently received and accepted an offer from the Canada International Development Agency (CIDA) to be a Junior Analyst for Honduras-Nicaragua. He will be based in Ottawa initially with frequent missions to the field.

Nisa Chamsuwan, (ICU) will be a Police Training Program Coordinator with Asian Forum for Human Rights and Development in Bangkok, Thailand.

Rotary Centers Peacebuilder Districts

Each district is asked to set the goal to obtain at least one additional Rotary Center Peacebuilder District Commitment for TRF by 31 October 2005. Donations made by the end of October will ensure that TRF is able to fund at least 60 fellowships. Districts that donate DDF in the amount of US\$25,000 per year or US\$50,000 every other year to support a Rotary World Peace Fellow for study at one of the Rotary Centers for International Studies for the 2006-07-program year and beyond are recognized as Rotary Centers Peacebuilder Districts. TRF will recognize Peacebuilder Districts with special banners and certificates. Use the form on the website to become Peacebuilder District

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

If a Peacebuilder commitment is not possible, please donate any amount of DDF to the program using the Educational Programs and Rotary Foundation Fund Pools Donation Form for Rotary Year 2006-07.

Ambassadorial Scholarships and Rotary Grants for University Teachers

Regional Scholar Orientation Seminars

Thanks to Regional Scholar Orientation Seminars held throughout the Rotary world in 2004-2005 Ambassadorial Scholars, Rotary World Peace Fellows, 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.”

We would like to take this opportunity to thank RRFC Rob Brown, who represented the Educational Programs staff at the Zone 32 Outbound Scholar Orientation Seminar held on 11-12 June 2005 in Valley Forge, PA. RRFC Rob gave a few presentations to scholars regarding RI and TRF programs, about their roles and responsibilities as Ambassadors of Goodwill, and was at hand to respond to questions.

On 4 July 2005, the first ever Italian Regional Scholar Seminar was held in Bologna, Italy. Since 1999, the Trustees have offered grants to defray the costs of large-scale, multi-district seminars. 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 the Pacific Northwest, California and Brazil, involving RI Regional offices where possible, to help them start (or resume) organizing a seminar for 2005-06. We will be soliciting our RRFCs' help in the implementation of such important events.

RRFCs are encouraged to support and attend - when possible - the scholar seminars in their regions. For further information, contact Stephanie Veit, Scholarships Department Manager, tel: 847-866-3323; fax: 847-866-0934; e-mail: veits@rotaryintl.org or visit our website at: http://www.rotary.org/foundation/educational/amb_scho/seminars.html.

Host Counselors Reminder

The deadline for districts to notify TRF of host counselor assignments for 2005-06 Ambassadorial Scholarships and University Teachers was 15 June 2005. As of that date TRF had received host counselor appointments from only 20 % of districts.

The Ambassadorial Scholarships and Rotary Grants for University Teachers programs rely on Rotarian counselors to guide participants' Rotary involvement during their award experience. 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 847-866-0934 or e-mail: scholarshipinquiries@rotaryintl.org.

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 one 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**.

Group Study Exchange

Reimbursements for 2004-05

Districts are reminded that requests for reimbursements from the 2004-05 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 received at TRF if documentation and receipts are complete.

2006-07 Pairing options

Districts should be well on their way to securing a GSE partner district for the 2006-07 program year. The 2006-07 GSE District Applications will be sent 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 2005. 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 headquarters.

2005-06 GSE Materials to be sent to District GSE Chairs

In mid to late August, all newly revised GSE materials (including handbooks, brochures, applications and alumni pins) will be sent to each District GSE Chair. We ask that each district use these new 2005-06 forms and consult the new Program guide rather than the previous material that is now outdated. GSE publications and materials will be posted on the web for download in 8 languages.

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 (on CD if possible) 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

Rotary shall stay vigilant until we can report 0 cases for an entire year!

Polio cases for 7 June 2005

Global cases of poliovirus: 448

Yemen (importation)	220
Nigeria (endemic)	144
Sudan (re-established transmission)	25
Indonesia (importation)	20
India (endemic)	18
Ethiopia (importation)	10
Pakistan (endemic)	7
Afghanistan (endemic)	2
Cameroon (endemic)	1
Niger (endemic)	1
Egypt (endemic)	0

“Conquering Polio”

Past general secretary and International PolioPlus Committee vice chair Herb Pigman distributed "Conquering Polio", a concise and beautifully illustrated history of PolioPlus, gratis to convention participants. Each Regional Rotary Foundation Coordinator will receive a copy for their reference. If you would like additional copies, please contact Melanie Streich, PolioPlus Program Coordinator, by e-mail at streichm@rotaryintl.org or by phone at 847-866-3305.

PLANNING & ADMINISTRATION

To the RRFs who have just ended their term for 2004-05, many thanks for all you have done and will continue to do in support of The Rotary Foundation. This has been a phenomenal year and your vigilant efforts have helped change the lives of many around the world, and we truly appreciate your commitment and leadership.

To the incoming and continuing RRFs for 2005-06, we look forward to working with you for another successful year in Rotary. The goals have been set, and there is much work yet to be done. Through *Service Above Self*, The Rotary Foundation should be able to reach those goals, and make a difference in the lives of those we may never see.