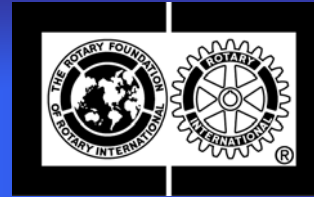


The Regional Rotary Foundation

COORDINATOR COMMUNIQUÉ



October 2005

A Forum for Foundation News

FUND DEVELOPMENT

Contributions Update

As of 30 September 2005, contributions to The Rotary Foundation totaled US\$21,005,679, an increase of 20.33% over last year at this time. Giving to the Annual Programs Fund at US\$12,454,037 increased 14.87%. Contributions to the Permanent Fund at US\$3,855,142 showed significant gains to 136.45% resulting from four large realized estate gifts. Restricted giving which now includes PolioPlus contributions declined -5.78% to US\$4,696,500.

	<u>September 2005</u>	<u>September 2004</u>	<u>Increase (Decrease)</u>
Annual Programs Fund	US\$12,454,037	US\$10,841,983	14.87%
Permanent Fund	US\$ 3,855,142	US\$ 1,630,423	136.45%
<u>Restricted Giving</u>	<u>US\$ 4,696,500</u>	<u>US\$ 4,984,815</u>	<u>(5.78%)</u>
TOTALS	US\$21,005,679	US\$17,457,221	20.33%

November is Foundation Month

Will you have an impact sharing the message of The Rotary Foundation in November? Please work with the Annual Programs Fund Strategic Advisors and the Major Gifts Advisors in your Zones to help you convey the importance of giving to our Foundation.

The attached document, “15 Winning Ideas for Achieving EREY Success” provides you with some ideas to share in your newsletters and email messages to your zone and district leaders. Some of these ideas are not new – but they work. Occasionally returning to the basics of fundraising helps us keep the FUN in FUNdraising.

Some basic elements to think about during Foundation month is why people give, to whom do they give, and what will it take to get them to give again. It’s good to remember that:

- 1) ***Before encouraging others to give, you should be a donor first.*** If you haven’t yet made your annual gift, lead by example and contribute during Foundation month.
- 2) ***People give because they are asked to give.*** If Rotarians are not aware of the need, you cannot expect them to respond.

- 3) ***Fundraising is not just asking for a gift, it's inspiring.*** Tell the story of Rotary. Talk about Foundation projects you've been personally involved in, those which have been a life-changing experience for you and for those helped by the project.
- 4) ***People give to people.*** When Rotarians contribute to our Rotary Foundation, they are supporting the programs and projects identified, developed and managed by their fellow Rotarians throughout the world. Other charitable organizations do not inspire their members or donors to participate in both giving and the decision-making on how their contributions are spent. This is unique only unto Rotary. Encourage Rotarians to get involved in their Rotary Foundation. Involved Rotarians, remain Rotarians for life.
- 5) ***Fundraising is about needs, not achievements.*** While we talk often of setting Annual Programs Fund Goals, achieving a US\$100 per capita or more, or achieving 100% participation in ***Every Rotarian, Every Year***, the real goal is identifying a need and then taking the necessary actions to fulfill that need – and just making the world a better place today than it was yesterday.
- 6) ***Realizing that there are more needs in the world than we can fulfill but we can make a difference.*** Sadly, we could never fulfill every need that is out there, but if we don't continue to encourage ***Every Rotarian*** to contribute ***Every Year***, we won't accomplish anything. Through our collective contributions to The Rotary Foundation, we continually find meaningful ways to help others.
- 7) ***Share the Foundation message with every Rotary club.*** Make every effort to work with other senior leaders, district governors, district governors-elect, district Rotary Foundation chairs, annual giving subcommittee chairs, permanent fund chairs, to ensure that every Rotary club contributes something to the Foundation. In 2004-2005, there were nearly 8,000 Rotary clubs who did not contribute to the Foundation. Look to see how many noncontributing clubs you had in your zone(s). Find out the reasons why. Do they really know what The Rotary Foundation is all about?
- 8) ***Share the messages with The Rotary Foundation.*** We appreciate the fundraising ideas you give us to share with others on our website and in our publications. One great idea can generate ten more. We take your suggestions seriously. We can't always put them into action as quickly as we would like, but they are not forgotten. Keep those ideas coming.

The success of our Foundation programs depends on the work we do to increase awareness and educate the Rotarians in our zones, districts and clubs about The Rotary Foundation. You are the lead fundraiser in your Zone. You attained that position within the Foundation because you care.

From all of us in Fund Development, thank you, for all that you do for our Foundation!

New Enhancements = Better Service

Fund Development will soon be upgrading its database into a new system. While every precaution is being taken to ensure that the transfer of data is accurate and complete, club, districts and individuals may experience glitches in accessing that data and printing reports as systems are being upgraded. The live transfer of data is scheduled to take place in mid November. We look to these enhancements to provide better service to Rotarians.

15 WINNING IDEAS FOR ACHIEVING

EVERY
ROTARIAN
EVERY
YEAR

MAKE YOUR GIFT COUNT

1. **Create or revamp your Rotary Foundation Committee.** Create a specific training session for them on EREY to help raise awareness and answer questions. **ASK THE COMMITTEE TO MAKE THEIR GIFT FIRST.** Utilize past or future leadership, Assistant Governors or even dedicated Rotarians willing to serve as “EREY Managers”.
2. Have a respected member of your club write a letter to **every Rotarian in the club asking for an Annual Programs Fund contribution.** Personalize the letters and ask for increased contributions from those Rotarians who you know to have capacity. This method has resulted in larger gifts, above and beyond what they’d give if not specifically asked by their leader. **BE SURE TO FOLLOW UP THE LETTERS WITH A PERSONAL PHONE CALL FROM A MEMBER OF YOUR FOUNDATION COMMITTEE.**
3. **Use available Paul Harris Fellow matching point credits as a “match” incentive to raise new money.** For example, if you donate \$500, the club will transfer 500 credits to you and you can become a PHF or multiple PHF. (Please note that credit transfers cannot be included in computing Major Donor status, which is defined as “\$10,000 of personal giving”.)
4. **Get your club involved in international or local community service projects that involve DDF** (i.e., Matching Grants, GSE, District Simplified Grants etc.) Once clubs see how they can benefit from Foundation dollars, they are more willing to give.
5. **Have a Rotary Foundation dinner or event inviting all members AND their spouses.** Recruit help to find donated services/goods/silent auction items etc. Highlight one of the programs of The Rotary Foundation with a speaker or program (i.e. Ambassadorial Scholarships, GSE, Matching Grants, etc.). Donate all proceeds to The Rotary Foundation.
6. Arrange for a **charismatic speaker** to explain Foundation programs and to show them what their money is doing with pictures & stories. There is great talent in every District and your RRFC or APF Strategic Advisor is a great resource.
7. Develop the culture of giving by using **specific success stories that put a face on The Foundation.** Use “Foundation Minutes” to tell a brief story at regular intervals during the year. There are also great story ideas in “The Rotarian” magazine.

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8. **Encourage friendly competition** among “teams” in meeting their goals first or in exceeding goals. Have a fun prize (i.e. the winning team is served a steak dinner by the losing team).
 9. **Break giving into specific tangible items.** If you’re doing a literacy project, challenge each member to make a gift that will match a specific accomplishment (buy one computer or one book) with their giving.
 10. **Educate NEW members.** Make them aware of the work of The Rotary Foundation immediately upon joining the club (or before). Make giving to The Rotary Foundation (EREY) – *in any amount* – an expectation of membership.
 11. **Use automatic deductions via [TRF-Direct Donations](#).** These contributions can be made monthly - like your mortgage payment. They are automatic, and make it easier to give a larger gift. For example, \$200 is only \$16.67 per month. (So why not make it \$300 or a nice round \$25 per month?) This method is also easier on your club Treasurer and gets the money “to work” faster.
 12. **Utilize credit card gifts.** These gifts can be made on-line at www.rotary.org or by filling out the [credit card contribution form](#). The donor can make a gift to The Foundation and get “miles” or “cash back” at the same time. It’s a WIN-WIN situation!
 13. **Ask for [gifts of appreciated stock](#).** This is a way for donors to make a gift and get credit for the full market value of the stock. If they sold the stock, they would have to pay capital gains taxes on the gain first and could only donate the remaining amount. Another WIN-WIN situation!
 14. **Add contributions as an optional line item onto the quarterly bill *for a portion*** of their annual gift (i.e. \$25 per quarter). This will get your donations up, but you should still have a Foundation campaign for educational purposes and to encourage members who are able to give additional funds. Remember, THE GOAL IS “EVERY ROTARIAN, EVERY YEAR”
 15. **Encourage Rotarians to become a Benefactor or join The Bequest Society.** This is a very effective way to raise funds for the [Permanent Fund](#) because EVERYBODY has the ability to leave a portion of their estate to Rotary via the Permanent Fund. It will also help educate Rotarians on the importance of their gifts long term (“Leaving a Legacy”).

For questions or further details on the *Every Rotarian, Every Year* effort, please contact your Annual Giving Officer at 847-866-3352 or at everyrotarianeveryyear@rotaryintl.org.

Katrina Relief Fund Update

Current contributions total over \$359,000 (unaudited).

Rotary Zones 29 and 30 have established a Donor Advised Fund called the "Katrina Relief Fund" and are prepared to receive contributions from Rotarians. A committee identified by the leadership in the two zones will work with local Rotary clubs and districts, as well as emergency relief agencies, to meet the most pressing needs of people in the affected areas. Please note, that contributions to this account can only be accepted in US dollars. No Foundation recognition is provided for contributions to this account.

Make all checks payable to "TRF DAF" and indicate "Katrina Relief Fund" in the MEMO line. Checks should be mailed to:

Mr. Clint McGowan, TRF DAF
The Ayco Company
855 Route 146, Suite 120
Clifton Park, NY 12065

Credit card donations may be made through www.sporg.com
https://www.sporg.com/registration?link_type=reg_info&form_id=31292&view_type=windowed By using this method of contribution you acknowledge that Rotary International and The Rotary Foundation make no warranties as to the security of the website, nor the data collected.**

Permanent Fund Update

As of 30 September 2005 expectancies to the Permanent Fund stood at US\$299 million. As of 30 June 2005 the Fund's net assets were US\$157.8 million.

Bequest Society Update

As of 30 September 2005, there were 4500 Bequest Society commitments with an expected value of US\$188 million. These commitments represent a significant percentage of the expectancies to the Permanent Fund.

Donor Advised Fund Update

As of 30 September, there were 61 DAF accounts with a fair market value of US\$2.9 million. For additional information on The Rotary Foundation Donor Advised Fund, please visit <http://daf.rotary.org>

EDUCATIONAL PROGRAMS

Rotary Centers for International Studies

2003-05 Rotary World Peace Fellow Alumni

2003-05 Rotary World Peace Fellow alumni (Class II) have started to re-enter the workforce following their master's degree programs, examples of which include:

International Organization on Migration

Junior Professional Officer

Khartoum, Sudan

Mai Hosoi of Japan, Duke University Graduate

Caritas Italiana

Relief Project Coordinator

Gunung Sitoli, Nias, North Sumatra, Indonesia

Stefano Gnes of Italy, Sciences Po Graduate

UNESCO

Asia Pacific Centre of Education for International Understanding

Young Peace Messenger Forum

Seoul, Korea

Ji-Hyang Lee of Korea, UC-Berkeley Graduate

Government of Assam, India

Commissioner and Secretary, Home and Political Departments

Guwahati, Assam, India

Rajiv Bora of India, UC-Berkeley Graduate

Two Rotary Centers Committees Meet in November

The Rotary Centers Committee Meeting will meet in Evanston, November 15-18, 2005 to select the Class V Rotary World Peace Fellows. In addition to selecting the next class of fellows, the committee will address other programmatic issues, hear reports from the recent site visits to all seven universities by committee members, and listen to presentations from each of the university representatives. The Rotary Centers Host Area Coordinators will be meeting in Evanston from November 14-16 and will join the Rotary Centers Committee for a part of that meeting. This is the first time that both committees will meet jointly. Past RRFC's Duane Sterling and Sakuji Tanaka are on the Rotary Centers Committee.

Rotary World Peace Fellow Alumni and Current Fellows Speak at Zone Institutes

The following Rotary World Peace Fellow alumni have spoken or are scheduled to speak at upcoming Zone Institutes:



Mwilia Chigaga, Class III Duke/University of North Carolina-Chapel Hill

Zones 33-34, Atlanta, Georgia, September 30 – October 2



Arnoldas Pranckevicius, Class I Sciences Po, Paris

Zones 10 (B)-14, Lille, France, October 15-16



Jeanette Kroes, Class II Sciences Po, Paris

Zones 10 (B) –14, Lille, France, October 15-16



Carmen Strigel, Class I Duke/University of North Carolina-Chapel Hill

Zones 4B, 6B and 7B, Manila, Philippines, October 21-21



Carolyn Fanelli, Class I, University of Queensland, Australia

Zone 10 (A), Johannesburg, South Africa, November 19-20



Monica Alfred, Class I, University of Bradford, UK

Zone 5 & 6A, Colombo, Sri Lanka, December 9-11

Rotary Peace and Conflict Studies Program

Updates

The Rotary Peace and Conflict Studies Program Application (091) translations will be posted on the website by the end of October. In addition, we are currently working on an exciting new website due to roll out before the end of the year. Also in October, a representative from Chulalongkorn University, our university partner in Thailand, will be attending the Rotary Center Annual Seminar at the University of Queensland, Brisbane, Australia.

Reminder

District-endorsed Rotary Peace and Conflict Studies Program applications are due at TRF on 15 January 2006 for both the July-September 2006 and January-April 2007 sessions.

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 2005-06 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 third 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 2006-07 Scholarship Applications from their districts;
- 2) Assignment letters sent to 2006-07 Ambassadorial Scholars.

Sponsor Districts and recipients of these letters are referred to the following link for an updated list of 2005-06 Regional Scholar Orientation Seminars:

<http://www.rotary.org/foundation/educational/amb_scho/seminars.html>

More on Scholar Orientation Seminars!

The Educational Programs staff would like to acknowledge and thank the following RRFCs for their outstanding participation in recent inbound and outbound Regional Scholar Orientation Seminars:

RRFC Rob Brown (Zone 32), who for the second time participated in Link, an inbound scholars orientation seminar, held in Valley Forge, Pennsylvania, USA, on 30 September-1 October 2005

RRFC Carolyn Pierce (Zone 31), who participated for the second time in NorthEast Link, the inbound and outbound regional scholar orientation seminar held in Nashua, New Hampshire, USA, on 1-2 October 2005.

RRFC Bernard Bonnes (Zone 11), who for the first time and with great enthusiasm participated in the France Welcome Weekend, the inbound regional scholar orientation seminar organized by the French Foundation Alumni Association, held in Paris, France on 30 September, 1 & 2 October 2005.

Scholarships Fund Pool for Low-Income Countries

The Scholarships Fund Pool for Low-Income Countries Selection Committee will meet 30 November and 1 December 2005, at Rotary International World Headquarters. This year's committee is chaired by Past RRFC Chairman Marcus P. Doyle (South Africa) and includes as its members Past RRFCs David C.J. Liddiatt (England), Jesse Devlyn (Mexico), and P.T. Prabhakar (India). The committee will review the 2006-07 scholarship candidates and select up to 32 finalists.

There is still time to donate to the Scholarships Fund Pool for Low-Income Countries!

Forty-one districts have donated a total of **US\$251,035** in District Designated Funds (DDF) to the Scholarships Fund Pool for Low-Income Countries for 2006-07 Ambassadorial Scholarships. These donations will help support a key objective of the Ambassadorial Scholarships Program: *Encouraging Rotarians worldwide to increase the educational opportunities for scholars from low-income countries*. All districts are encouraged to donate *any* amount of DDF to this fund pool as they make their *SHARE* decisions for program year 2006-07.

Group Study Exchange

GSE Poster Contest

To celebrate 40 years of success as a TRF Educational Program, the Group Study Exchange (GSE) Department is sponsoring a Poster Design Contest for all GSE alumni (this includes both former team members and team leaders). A TRF panel will choose the winning design from all eligible designs submitted by the deadline of **30 December 2005**, to be unveiled at the 2006 Rotary International Convention in Malmo/Copenhagen. The poster will also be available for purchase through the RI publications catalog.

Since the deadline is fast approaching, we ask that you please contact GSE alumni as soon as possible. Please direct all questions regarding the poster contest to GSE coordinator Anita Daniel at daniela@rotaryintl.org

2006-07 GSE Pairing Confirmation

For the 2006-07 program year, districts will receive electronic copies confirming their partnership. In addition, we will be attaching a District Information Form that will need to be filled out and returned to TRF no later than **31 December 2005**. Governor elects can get in touch with their partners using the intranet forum/Member Access section of the Rotary website at <https://riweb.rotaryintl.org/>.

Once the Governor-elects have contacted their partners, they can confirm the dates of travel and departure cities. This information is crucial to the GSE department in order to assist the districts with their predeparture requirements and travel tickets.

Reminder for GSE Teams Traveling in 2005-06

All travel request forms and predeparture documents (team member applications, team member applications, medical and insurance certificates) must be submitted to TRF **at least 6 weeks before departure**. Failure to submit this information in a timely basis may result in a delay of travel for the team. Please contact your GSE coordinator at TRF for questions and concerns.

2004-05 Final Report submission

Please remind your districts to submit their final reports for GSE teams that traveled in the 2004-05 program year. Failure to submit their final report might prevent the district from being confirmed for a 2006-07 partnership in the GSE program. Districts can contact their GSE coordinator at TRF if they have any questions or concerns.

HUMANITARIAN GRANTS PROGRAM

HP Annual Report on Operations



04-05 HP Operations Report.pdf

Attached is the Humanitarian Grants Program's Report on Operations for 2004-05.

Stewardship Assessment Reports

TRF has received five of the seven stewardship assessment reports from PricewaterhouseCoopers (for D-3120, D-3080, D-3170, D-3190 and D-3290), and has received a forensic audit report regarding selected grants in D-3280. Fieldwork for the D-3260 stewardship assessment has been delayed, but is now almost completed. Fieldwork for the final stewardship assessment, in D-3150, is underway."

POLIOPLUS

PolioPlus Partners Issues Urgent Appeal for Funds

The PolioPlus Partners Program currently has 19 projects in need of over US\$5 million. Many of these projects need funding now to support synchronized National Immunization Days in Africa this fall. Please encourage Districts to consider giving *SHARE* funds to the program. Cash contributions from individuals and clubs are automatically matched at the rate of US\$.50 per dollar donated. Funds will help Rotarians on the front lines of the polio eradication battle by providing support materials for the NIDs such as vaccine carriers, posters to announce dates and locations of NIDs and 4x4 vehicles to reach remote villages. An Open Projects List and other details can be found at <http://www.rotary.org/foundation/polioplus/partners/about.html>

Moderator's Message



Purely Personal

In the many discussions with trustee chair Frank Devlyn, he often cites to me his 4 key words for our Rotary Foundation, Think, Time, Talent, and Treasure.

The Rotary Foundation is my personal **TREASURE** for people who may never know its name, like those billions of children we immunized from polio. I made my annual contribution of \$1,000 and achieved my personal goal of obtaining 1 new Rotarian committed to contribute a minimum of \$1,000 every year and 5 new Bequest Society members on or before 1 November 2005. It was not hard and not too significant. However, it does make me feel good to know that in these small ways I have helped to make a better world ensuring the next generation can have the treasured opportunity to grow normally, attain basic education and freely choose how they too can make the world more peaceful.

I wish you all the best of success as you celebrate our treasured Rotary Foundation month of November by achieving your goals for those districts you have responsibility as RRFC.

Louis Piconi, PRIVP, Moderator, 2005 RRFC Institute