



## 我們的扶輪基金會通往未來之路： 為第二世紀服務作準備

### Our Foundation's Pathway to the Future : Preparing for the Second Century of Service

2005~2008 年間地域扶輪基金會協調人  
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#### 與思考等快的扶輪

#### Rotary @The Speed of Thought

1917 年阿特蘭大年會，RI 前社長阿克·柯藍夫 Arch Klumph 提出所謂“教育捐贈基金”Endowment Fund。於是扶輪基金會的第一筆捐贈基金是由主辦國際年會的堪薩斯市扶輪社所捐出的 26.50 美元，因此，至 2017 年扶輪基金會將屆滿 100 週年。由於保管委員會為了扶輪基金會能成功地邁向其第二世紀的服務，因此決定從 2005 年逐漸發展出以三年時間的計劃來將扶輪基金會邁向其第二世紀服務的一項 10 年的願景。並於 2006 年 7 月 1 日成立了-未來願景委員會 Future Vision Committee。

扶輪基金會未來願景委員會於是開始諮詢許多專家，並對 20,000 位以上的扶輪社員做過意見調查，所蒐集的意見、背景資料、及出版品是扶輪基金會有史以來最多的。因此，未來願景計畫是一個藉由訪談、調查、重點團體和收集意見的會議以及一項廣泛的探討設定目標處理方式和一項成功執行的藍圖來反映出資金擁有者廣泛的意見的一個百年大計-它將分成短、中、長期計畫。並且它已從 2006 年 7 月 1 日起逐步開始實施，且在 2007 年 6 月 30 日之前已全面就緒。

同時，依配合獎助金計畫成長的歷史來看，從 1965 年第一筆配合獎助金至 2000 年，35 年間共核准了 10,000 件。然而 2000-2004 年短短的四年間，就快速成長保管委員會同樣核准了 10,000 件。就算將配合獎助金從小額的 2,000 美元提高至 5,000 美元，2004-2007 年的三年間，居然亦核准了 6,300 件。扶輪基金會未來願景委員會對此急速的發展提出了一些新模式，並至 2012-13 年度要完全實現的新模式的目標：

- 獎助金結構新的模式
- 策略性的合作關係新的模式

- 可分配的基金新的模式

2006-07 年度扶輪基金保管委員會主委羅勃·司考特說“對於每個人的每件事已經讓扶輪基金會努力去瞭解到它的使命。而該新的結構會讓我們去建構於我們的實力與瞭解到更多能維持的後果之上。”（“Being everything to everyone has left the Foundation struggling to realize its mission. The new structure allows us to build on our strengths and realize more sustainable outcomes.” - Robert S. Scott, 2006-07 Rotary Foundation Trustee Chair）

而此未來願景計劃將在四月確定該過渡性草案的階段。在 2008-09 年度保管委員會將在全球挑選出大約 60 個依地理上分佈的地區來參與一個 2009 到 2012 年實施的試驗計劃。至於剩下的地區仍沿用目前的計劃及獎助金的程序。

同時，保管委員會和國際扶輪理事會核准及立法會議通過了扶輪基金會新的使命及願景和它新的座右銘“於世界行善 Doing Good in the World”。

最後我們相信我們的未來之路會是一條冗長且堅定的過程。我們對此並不期盼在短期能有所預期的結果，而是在未來的 5-10 年以及在下個十年於慶祝我們的百週年紀念時，在我們堅定、持續地去改善我們的扶輪基金會一定會使它成為一種更加強固、更加簡單、和更加出色的扶輪基金會，且未來的新模式定將繼續滿足世界最需要的需要。

扶輪基金會之使命...，是要使扶輪社員透  
過保健的改善、教育的支持及貧窮的減輕  
來促進世界的瞭解、親善與和平。

# 未來願景

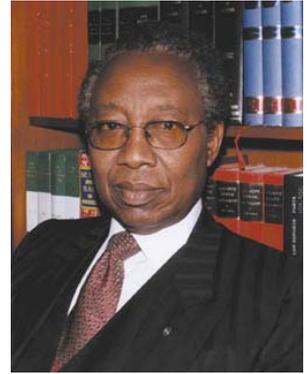
## Future Vision

強納生·馬奇約伯 Jonathan Majiyagbe 演講稿

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2005~2008年間地域扶輪基金會協調人 RRFC Dens 翻譯



我的扶輪社員夥伴們，(幻燈片 1)

非常榮幸向各位提出關於扶輪基金會的未來願景計畫的最新簡報。保管委員會於檢討目前的扶輪基金會，並且在展望它的第二個世紀的服務的潛能方面業已採取了重要的措施。我們將在下個十年來慶祝我們的百週年紀念，我們全然堅信我們持續地去改善我們的扶輪基金會一定使它更加強固、更加可辨識出來、並且更易達成的。

我們的未來之路會是一條冗長且堅定的過程。我們對此並不期盼在短期能有所預期的結果，而是在未來的5-10年我們成為一種更加強固、更加簡單、和更加可辨識出來的扶輪基金會的預期發展和選擇。任何及全部所有的選擇將被加以研究，以便瞭解到對扶輪基金會繼續滿足世界最需求的需要的未來模式的影響。

(幻燈片 2) 今天，我希望我們能提供你在下列範圍內的最新簡短資訊

從教育計畫到人道主義提供一種改變的需求，你可能樂於知道我們配合獎助金計畫是開始於1965年。(幻燈片 3) 從1965-2000年間，在該計畫的前35年，共有10,000筆配合獎助金。然而，從2000-2004年間，在此4年期間有另外的10,000筆配合獎助金。這個快速的成長業已改變了扶輪基金會的許多方面，並且正是那些保管委員會開始一種未來願景過程的原因之一。

此外，我們業已可見從2004年7月6,300筆通過的獎助金到2007年6月每年大約2,000筆通過的獎助金持續的趨勢。

我們意識到採納從全世界許多扶輪社員們而來的看法的重要性。(幻燈片 4) 舉辦了重點團體及採納意見會議。超過120位人士參與了這樣的會議。依據該採納意見會議，我們獲得了幾個優先的議題。

那些議題在這裡加以總結—那就是我們所聽到的在簡化、均衡和所有權等方面。我們需要加重我們的重點以協助達成我們全球的任務。這包括指出我們應該停止做什麼。

另外，針對10,000位扶輪社員的調查，請他們回答他們要如

My Fellow Rotarians and Family of Rotary, // slide 1

It is my pleasure to present a brief update on the Future Vision Plan of The Rotary Foundation. The Trustees have taken significant steps in reviewing the current Foundation and envisioning its potential in its second century of service. We will be celebrating our 100th anniversary in the next decade, and we all believe we continually improve our Foundation—making it stronger, more recognizable, and more accessible.

The pathway to our future is a long and committed process. We are not looking at this with short-term expectations—we are anticipating progress and alternatives for a stronger, simpler, and more recognizable Foundation 5-10 years in the future. Any and all alternatives are being studied to understand the impact on the Foundation's future model as it continues today to meet the needs of the world's neediest.

// slide 2 Today, I hope we can provide you a brief update in the following areas

Given a changing demand from educational programs to that of humanitarian, you might be interested to know that our matching grant program began in 1965. // slide 3 In the first 35 years of the program, from 1965-2000, there were 10,000 matching grants. However, in the four-year period from 2000-2004 there were another 10,000 matching grants. This explosive growth has challenged the Foundation in many ways and is **just one** of the reasons the Trustees embarked on a Future Vision process.

Additionally, we have seen the trend continue with 6,300 approved grants from July 2004 to June 2007—approximately 2,000 approved grants per year.

We realized the importance of getting input from the perspective of many Rotarians the world over. // slide 4 Focus groups and input sessions were conducted. More than 120 individuals participated in such sessions. Based on the Input Sessions, several themes emerged—which are captured in our priorities

The themes are summarized here—but what we heard is simplification, balance and ownership. We need to sharpen our focus to help achieve our global mission. This includes identifying what we should stop doing.

Additionally, a survey of 10,000 Rotarians asked

何測量扶輪基金會的成功。最前三的回應包括：1) 根除小兒麻痺等疾病，2) 扶輪基金會是第一個選擇的夥伴；以及 3) 認為扶輪基金會是首要的基金會。保管委員會同意並且感到我們所展望的方向提供了達到這些預期最佳的機會。

當它開始從事於扶輪基金會的一個新使命聲明時，所有的初步工作都對未來願景委員會有所幫助。(幻燈片 5) 新的扶輪基金會使命的聲明是在保管委員會他們的 2006 年 4 月會議上通過，接著被理事會批准，並且在 2007 年立法會議上壓倒性的同意。

未來願景委員會指出並且建議保管委員會通過的五個優先事項。(幻燈片 6) 這些優先事項事由保管委員會、理事會所批准，並且再次於 2007 年立法會議同意。

謹記這些改變將會反映出扶輪社員的要求與感興趣之處，保管委員會在他們的 2007 年 10 月會議通過一個長期的建議計畫。(幻燈片 7) 未來願景委員會繼續對所有的選擇、相關事宜，和任何計畫更新對未來的影響去作研究。

保管委員會也考慮到要確保任何會影響到扶輪基金會第二個世紀的服務未來模式的需要，需要得到扶輪社員的支持以及在實施之前的瞭解。未來願景委員會也致力於發展聯繫、教育、和訓練計畫以確保扶輪社員支持並且瞭解任何未來扶輪基金會的模式。

未來願景委員會開創了它自己的"五大考驗"(幻燈片 8)並且以這些目的來發展所推薦的模式。這些目的會與未來願景計畫的優先事項和目標一致。

第一個類的獎助金(幻燈片 9)讓扶輪社和地區去支持在他們的社區內和在國外他們感興趣以及所提出之立即的需求。提供綜合獎助金給地區，這些獎助金是仿效當今的地區簡易獎助金。地區將至多使用他們的地區指定用途基金 DDF 的百分之四十來支援這些獎助金。

請注意我們正僅能使用"類型 A"與"類型 B"作為命名的位置標識。而在即將到來的 4 月會議上保管委員會將決定適當的名字。但是目前，我們只使用"類型 A"與"類型 B"。

(幻燈片 10) 第二類獎助金將提供機會給予參與較為策略性重點、持續的活動，而獲得基金會更多支援。這些獎助金資助於策略重點的範圍內之大計劃——一項由扶輪社社員所找出世界性優先的需求，在基金會所主導其資源下，使其有一種可維持的及可衡量的影響力。

(基金保管委員會，將根據目前基金會計劃中，扶輪社員所顯示出的興趣及經驗而於其四月份的會議中決定 3 到 5 項重點的範圍，並將提交六月份的理事會中來加以考慮。)

respondents to indicate how they would measure the success of the Foundation. The top three responses included: 1) polio eradication, 2) TRF is a first choice partner; and 3) TRF recognized as a premier foundation. The Trustees agree and feel the direction we are envisioning provides the greatest opportunity to meet these expectations.

All the preliminary work was helpful to the Future Vision Committee as it began to work on a new mission statement for The Rotary Foundation. // slide 5 The new mission statement of the Foundation was adopted by the Trustees at their April 2006 meeting, approved by the Board, and endorsed overwhelmingly at the 2007 Council on Legislation.

The Future Vision Committee identified and suggested five priorities that the Trustees subsequently adopted. // slide 6 The These priorities were approved by the Trustees, the Board, and again endorsed by the 2007 Council on Legislation.

**Keeping in mind that changes will reflect Rotarians' demands and interests**, the Trustees approved recommendations for a long-term plan at their October 2007 meeting. // slide 7 The Future Vision Committee continues to study all of the alternatives, implications, and future impact of any program updates.

The Trustees are also very considerate of the need to ensure any future model that would impact the Foundation's second century of service would need to get Rotarian support and understanding prior to implementation. The Future Vision Committee is also working on developing communication, education, and orientation plans to ensure Rotarians support and understand any future Foundation model.

The Future Vision Committee created it's own "five way test" // slide 8 and used these objectives in developing the recommended model. The objectives align with the priorities and goals of the future vision plan.

The first type of grant // slide 9 allows clubs and districts to support their specific service interests and address immediate needs in their communities and abroad. Provided as block grants to districts, these grants are modeled after the current District Simplified Grants program. Districts will be able to use up to 40 percent of their District Designated Fund to support these grants.

Please be aware that we are using "Type A" and "Type B" as placeholder names only. The Trustees will decide upon the proper names at the upcoming April meeting. But for now, we are using just Type A and Type B.

// slide 10 The second type offers opportunities to participate in more strategically focused, sustainable activities with greater support from the Foundation. These grants will fund larger projects in a strategic area of focus -- a priority world need identified by Rotarians in which the Foundation is directing its resources to have a sustainable and measurable impact.

(Three to five areas of focus will be determined by the Trustees at their April meeting, based on demonstrated Rotarian interest and experience in current Foundation programs, and considered at the June Board meeting.)

在這項獎助金之下，地區及扶輪社將會有以下兩種選項：

- 扶輪社及地區指定計劃
- 與策略合作關係組織機構之包裹式計劃

保管委員會所同意以下"重點的範圍"的定義(幻燈片 11)

其特性包括：

1. 不同於全體共同的計畫
2. 與扶輪基金會的任務有關
3. 提供持久性和長期的承諾(7-10 年)
4. 範圍縮小到足以建構出持續的受益人結果的特殊的策略
5. 證明出扶輪社員的參與和所有權

保管委員會請求對所考慮建議重點的範圍在他們 2008 年 4 月會議上作出回應，並於在 2008 年 6 月確認理事會核准的要求。扶輪基金會與專門從事于重點的策略範圍內之一之機構成立策略合作關係。(幻燈片 12)該策略合作關係 SCR 之機構將提供財務支援、學術上的專門知識和/或由扶輪基金會並包含扶輪社員的參與而共同規劃之計劃和活動所倡導的成果。除了增加扶輪基金會獎助金之影響外，這些合作關係將提供獲得扶輪事工更多表彰的機會。

策略合作關係 SCR 模式有下列的特性：

1. 明確地與重點的範圍相關
2. 適用於更大類型的獎助金
3. 從非政府間組織和每個重點範圍的其他專家所研發或他們的請求
4. 策略合作關係 SCR 將提供財務、技術、和/或所倡導的資源
5. 該模式將會有 3 種不同資金讓人去選擇
6. 仍然去鼓勵當地/地域夥伴關係
7. 扶輪社/地區提供財務和/或人力資源，或者兩者偕提供

這個主要策略是調控額外的資源使扶輪社員能夠完成扶輪基金會的任務。

一種可分配資金的模式是被用於簡化提供資金的過程。(幻燈片 13)

第一類型的獎助金，或綜合獎助金，將地區指定用途基金 DDF 的一部分用來提供資金。在這三年之試驗時期，地區可運用至多 40%其可用的地區指定用途基金 DDF 來支援小型當地及國際計劃和擴大的活動。這些百分比每年將會由保管委員會來加以重新檢討。

至於第二類獎助金，扶輪社和地區設計的獎助金計劃將可藉

Under this grant type, clubs and districts will select from two options:

- Club- and district-designed projects
- Package projects with strategic cooperative relationship organizations

The Trustees agreed to the following definition of "Areas of Focus" // slide 11.

Characteristics include:

1. Differentiates from corporate program
2. Relates to TRF's mission
3. Provides durability and long term commitment (7-10 years)
4. Narrow enough to construct specific strategies for sustainable beneficiary outcomes
5. Demonstrates Rotarian involvement and ownership

The Trustees requested feedback on recommended areas of focus for consideration at their April 2008 meeting and recognized the need for Board endorsement in June 2008

The Rotary Foundation will form strategic cooperative relationships // slide 12 with organizations that specialize in one of the strategic areas of focus. The SCR organizations would provide financial support, technical expertise, and/or advocacy efforts in projects and activities that are designed jointly with the Foundation **and include Rotarian participation**. In addition to increasing the impact of Foundation grants, these relationships will offer opportunities to achieve greater recognition of Rotary's work.

The SCR model has the following characteristics:

1. Relates specifically to areas of focus
2. Applicable to larger type Grants
3. Developed with or solicited from non-governmental organizations and other experts for each area of focus
4. The SCR will provide financial, technical, and/or advocacy resources
5. The model will have three different funding alternatives envisioned
6. Local/Regional cooperative relationships still encouraged
7. Clubs/Districts provide financial and/or human resources or both

The primary strategy is to leverage additional resources to enable Rotarians to fulfill the mission of TRF.

A distributable funds model is designed to simplify the funding process. // slide 13

The first type of grants, or block grants, will be funded by a percentage of District Designated Fund (DDF). During the three-year pilot phase, districts may use up to 40 percent of their available DDF to support smaller local and international projects with broadened activities. This percentage will be reviewed annually by the Trustees.

Under the second type, club- and district-designed grant

由一種世界基金 WF 配合地區指定用途基金 DDF 來支持；至於其他的取捨也將會被加以考慮。包裹式的獎助金計劃將藉由世界基金 WF、基金會盈利收入、由策略合作關係 SCR 組織機構的捐獻及其他資源的考量下，而以一种競爭性的程序來加以資助。為設計基金會之資源獲得最有效及策略性的使用以達到持續性之結果，這包裹式的獎助金計劃將不需要扶輪社及地區財務之支援。

該新的可分配資金的模式有以下的特性：

1. 目前的分享制度將依相同的方式保留下來(年度計畫基金 APF 是被分成 50/50 的地區指定用途基金 DDF 和世界基金 WF)
2. 類型 A 是藉由一部分地區指定用途基金 DDF 來提供資金—目前保管委員會同意地區至多能使用到 40%的可運用的地區指定用途基金 DDF
3. 每年策略合作關係 SCR 而來的臨時限定用途的收入是讓類型 B 所使用
4. 試驗階段將測試並且批准該模式
5. 包裹式的獎助金被設計由 100%世界基金所支助
6. 世界基金獎助金是藉由競爭性的過程來使用
7. 扶輪社/地區所設計的獎助金能包括競爭性世界基金 WF 配合到地區指定用途基金 DDF
8. 期待中的包裹式獎助金會有更大的金額

未來願景計劃將被執行於確認該過渡性草案的階段（將在四月定案）。在 2008-09 年度保管委員會將在全球挑選出大約 60 個依地理上分佈的地區來參與一個 2009 到 2012 年實施的試驗計劃。

扶輪社及地區將於 2008 年 4 月份保管委員會會議之後收到更多有關該計劃之資訊，同時有意願的地區請於 2008-09 年度中提出申請。訓練、教育、以及證明/資格的要求將會依照提供被挑選地區必要訊息方式來加以建立。目前預期在 2008-09 年度的上半年將會挑選地區。

在 2011-2012 年度裡保管委員會每年將會全面地評估該試驗計劃。(幻燈片 15)取決於試驗計劃的成功，目前預期在 2012-13 年度一種最新的獎助金模式會被實施於整個扶輪世界。

至於在試驗當中，剩下的地區仍沿用目前的計劃及獎助金的程序。

(如果需要的話)指出重點

試驗"證明"計畫的特性包括：

- 一致、標準化的試驗計劃
- 接受全世界地區的申請

projects will be supported by a World Fund match of DDF; other alternatives are also being considered. Package grant projects will be funded through a competitive process by the World Fund, contributions from SCR organizations, and other sources under consideration. Designed to achieve the most effective and strategic use of Foundation resources in reaching sustainable outcomes, the package grant projects will not require club and district financial support.

The new Distributable Funds model has the following characteristics:

1. The current SHARE system will remain the same (APF is split 50/50 between DDF and WF)
2. Type A grants are funded mainly by a percentage of DDF—currently the Trustees agreed that Districts could use up to 40% of available DDF
3. SCR result in temporary restricted income each year for use in Type B grants
4. The pilot phase will test and validate the model
5. Package grants designed for 100% World Fund support
6. World Fund grants available through competitive process
7. Club/District designed grants may include competitive WF match to DDF
8. Larger award amounts expected for packaged grants

The Future Vision Plan will be implemented in stages // slide 14 as identified in the draft transition plan (to be finalized in April). In 2008-09, the Trustees will select approximately 60 geographically dispersed districts to participate in a pilot program that will run 2009-12.

Clubs and districts will receive more information about the plan after the April 2008 Trustees' meeting, and interested districts will be invited to submit applications in 2008-09. Training, education, and certification / qualification requirements will be structured accordingly to provide the necessary information to the selected districts. It is currently anticipated the districts will be selected in the first half of 2008-09.

The Trustees will evaluate the pilot annually with a full evaluation in 2011-2012. // slide 15 The current expectation is for an updated grant model to be implemented throughout the Rotary world in 2012-13 depending on the successes of the pilot.

During the pilot, the remaining districts will continue to use the current programs and grants processes.

Points for emphasis (if needed)

The Pilot "Certification" Plan characteristics include:

- Uniform, standardized pilot
- Districts worldwide invited to apply

- 地區將試驗兩種獎助金類型
- 大約 60 個依地理分散的地區
- 逐步淘汰一些現行的計畫
- 扶輪基金會批准參加試驗計劃的申請
- 目前管理工作的訓練作為模式
- 地區要送被要求的地區扶輪基金會委員去訓練

(幻燈片 16) 保管委員會和未來願景委員會堅信該計畫的好處將與時愈增。過渡的目的是花費必要時間確保計畫的模式會導致預期的結果。重要的是要注意到該試驗計劃階段將給保管委員會有機會去讓這些好處生效。

重要的是要謹記，試驗階段會測試該模式，因此扶輪基金會和保管委員會能得到一種成功、挑戰和危機意識。並且，新模式的主要好處之一重要的是交流，扶輪社員和扶輪社和地區仍然能做他們喜愛的服務。在這個時期，新計畫並不會排除一個特定的計畫。計畫的選項創造出一種更為專心去接近將是扶輪基金會將會管理和資助之處。

保管委員會在他們的 2008 年 4 月會議上將作幾個重要的決定。此外，國際扶輪理事會在他們的 2008 年 6 月會議上將要考慮贊同該計畫。(幻燈片 17) 該幻燈片略述了下一步驟的關鍵。

秘書長聘用一位經理負責協調並且調整在國際扶輪、扶輪基金會和秘書處裡規劃的過程。(幻燈片 18) 如果你有任何問題或者意見，請與該經理聯繫。

此外，在 [www.rotary.org](http://www.rotary.org) 上未來願景網頁的可得到的更多的訊息。

現在我謹邀保管委員會主委鮑伯和保管委員會保管人麥克·馬洛尼與我一起。我們將很高興回答你們的任何問題。

謝謝。

- Districts will pilot both grant types
- Approximately 60 geographically dispersed districts
- Phase out some current programs
- TRF approves application to participate in pilot
- Current stewardship training serve as the model
- Districts send required district TRF committee members to training

// slide 16 The Trustees and Future Vision Committee believe wholeheartedly that the benefits of the plan will take time to unfold. The intent of the transition is to take the necessary time to ensure the plan's models result in the outcomes anticipated. It is important to note that the pilot phase will give the Trustees an opportunity to validate these benefits.

It important to remember that the pilot phase will test the models so TRF and the Trustees can get a sense of the successes, challenges, and pitfalls. And, one of the primary benefits of the new model that is important to communicate is that Rotarians and Rotary clubs and districts will still be able to do the service they enjoy. At this time, the new plan does not eliminate one specific program. The plan's options create a more focused approach in what the Foundation will

The Trustees are taking several important decisions at their April 2008 meeting. In addition, the RI Board of Directors will need to consider the plan for endorsement at their June 2008 meeting. . // slide 17 This slide outlines the key components of the next steps.

The general secretary hired a manager responsible for coordinating and aligning the planning processes in Rotary International, The Rotary Foundation, and the Secretariat. // Slide 18 If you have any questions or comments, please communicate with the manager.

Additionally, there is more information available on [www.rotary.org](http://www.rotary.org) on the Future Vision page.

And now I invite trustee Chair Bob, and trustee Mike Maloney to join me . We would be glad to take any questions you may have.

Thank you.



保管委員會主委強納生·馬奇約伯 Jonathan Majiyagbe 與第 2 地帶 RRFC Seiji Kita 以及第 1 地帶 RRFC Masahiro Kuroda(背對鏡頭)透過總部翻譯員 Eiko 交換著意見

## 扶輪研究中心，巨額捐獻行動

### The Rotary Centers Major Gifts Initiative

An overview for Regional Rotary Foundation Coordinators, Major Gifts Advisors, and other Rotary leaders

給地域扶輪基金會協調人、巨額捐獻顧問、及其他扶輪領導人之簡介

2008-10 年間國際扶輪理事謝三連提供

2008-10 RI Director Jackson Hsieh



#### 1. 前言

扶輪國際和平及解決衝突研究中心計畫是基金會對世界和平、親善、及瞭解的承諾之大膽及關鍵的一步。此計畫不再只是一個夢想，而是正在產生具體及有意義的結果，尤其是在錄取第一屆扶輪世界和平獎學金學生之後。鑒於扶輪研究中心對於創造世界瞭解及和平的重要性及潛力，扶輪基金會（TRF）通過以它作為永久計畫並在2005年10月核准一項特別的募款行動。扶輪研究中心繼續為基金會最高優先的教育工作。

本文所摘要的扶輪研究中心巨額捐獻行動（「本計畫」）企圖於2015年6月30日前取得總值9500萬美元的冠名及捐助捐獻及承諾捐獻，以保證扶輪世界和平獎學金的經費不致中斷。

#### 2. 需求及機會

各種致力於國家及國際和平的努力持續因全世界各地的戰爭、飢荒、貧窮、及疾病而受挫。自從1945年以來，已有100多百萬人由於各國國內及國際武裝鬥爭而喪命或受傷嚴重。在1990年至2002年之間，聯合國估計有360萬兒童死於內戰及種族衝突。聯合國兒童基金會最近報告，為保護兒童免遭受武裝衝突之影響，必須付出更多心力，藉由加強投資於調停及解決衝突，來處理暴力及貧窮的底層原因。此外，武裝衝突是目前世界飢餓的主

#### 1. Introduction

The Rotary Centers for International Studies in peace and conflict resolution program is a bold and critical step in the Foundation's commitment to world peace, goodwill, and understanding. The program is no longer a dream but is producing tangible and meaningful results, especially with the matriculation of the first few classes of Rotary World Peace Fellows. Recognizing the Rotary Centers importance and potential in creating world understanding and peace, The Rotary Foundation (TRF) adopted it as a permanent program and approved a special fundraising initiative in October 2005. The Rotary Centers continues to be the highest educational priority for the Foundation.

The Rotary Centers Major Gifts Initiative ("the Plan") summarized herein seeks named and endowed gifts and commitments worth US\$95 million by 30 June 2015 to assure continued funding of Rotary World Peace Fellowships.

#### 2. The Need and the Opportunity

Efforts to achieve national and international peace continue to be thwarted by war, famine, poverty, and disease around the world. More than 100 million people have been killed or seriously injured due to national and international struggles since 1945. Between 1990 and 2002, the United Nation's estimates 3.6 million children have died as a result of civil wars and ethnic conflict. UNICEF recently reported that to protect children from armed conflict more must be done to address the underlying causes of violence and poverty by investing more in mediation and conflict resolution. In addition, armed conflicts are now the leading cause of world hunger.

要原因。

扶輪基金會已成立扶輪國際研究中心：

- 以提升和平及親善、衝突原因、及世界瞭解等問題之研究、教學、出版、及知識；
- 提供高等教育機會給一群挑選自不同國家及文化的扶輪世界和平獎學金學生，以提升未來的政府、企業、教育、媒體及其他專業的潛在領導人的知識及世界瞭解；
- 成立一項計畫，使國際扶輪的扶輪基金會及國際扶輪會員社能越來越有效推廣各民族之間更大的容忍及合作，以促進世界和平及瞭解。

本計畫的實用結果之一是培養了一群訓練有素的調解人，這是任何和平處理的基本要素，他們能解決衝突的根本原因並建立有效的合作模式。

關於扶輪研究中心的計畫目標、大學夥伴、課程、及申請程序等詳細資訊，請參考扶輪網站。

### 3. 扶輪研究中心募款計畫

本計畫之目的是要在2015年6月30日之前累計籌募到9500萬美元的冠名及捐助捐獻來支持扶輪研究中心。此一目標含用於捐助獎學金的9000萬美元以及提供一次性冠名獎學金的500萬美元。預估9000萬美元（以2005年之美元價值）將提供每年資助120個獎學金學生所需的必要經費。

根據基金會在過去十年徵求巨額捐獻的經驗，9500萬美元目標的一大部份將以巨額捐獻承諾、終生收入協議、及遺贈會承諾的形式出現。這些捐獻及承諾所代表的資產需要很多年之後才能用於捐助扶輪研究中心計畫。因此，本計畫分二階段，每階段五年。

本計畫的第一階段將在2010年6月30日前尋求5500萬美元的冠名及捐助捐獻，以協助填補預料的資金收入缺口。它將包括至少四個策略：

- 1) 繼續在下一個五年為扶輪世界和平獎學金學生努力向個人尋求以冠名捐獻之形式的一次性60,000美元或以上之限制用途捐獻；
- 2) 尋覓有能力做一次性500,000美元或以上之巨額捐獻或捐獻承諾的新募款對象並確認其符合資格，以設立捐助的扶輪世界和平獎學金
- 3) 訓練一個義工團來推廣及徵求巨額捐獻和捐獻承諾給扶輪研究中心；以及
- 4) 為扶輪研究中心推廣終生收入協議（如受到當地法律支持的話），以及遺贈會捐獻承諾。

估計第一階段將收到以永久基金捐獻、承諾、終生收入

The Rotary Foundation has established the Rotary Centers for International Studies:

- to advance research, teaching, publication, and knowledge of issues of peace and goodwill, causes of conflict, and world understanding;
- to provide advanced educational opportunities for a group of Rotary World Peace Fellows chosen from various countries and cultures in order to advance knowledge and world understanding among potential future leaders of government, business, education, media, and other professions;
- to establish a program through which The Rotary Foundation of Rotary International and the member clubs of Rotary International may become increasingly effective in promoting greater tolerance and cooperation among peoples, leading to world peace and understanding.

One practical outcome of the program is a cadre of trained mediators, an essential element in any peace process, who can address the root causes of conflict and develop effective models of cooperation.

For detailed information on the Rotary Center's program objectives, university partners, curriculum, and application procedures, please refer to Rotary's website.

### 3. The Rotary Centers Fundraising Plan

The Plan aims to raise a cumulative amount of US\$95 million in named and endowed support for the Rotary Centers by 30 June 2015. This target is comprised of US\$90 million to endow fellowships and US\$5 million to provide one-time named fellowships. It is estimated that US\$90 million (in 2005 dollars) will provide the funding necessary to endow up to 120 fellows per year.

Based on the Foundation's experience soliciting major gifts over the past decade, a significant portion of the US\$95 million target will be in the form of major gift pledges, life income agreements and Bequest Society commitments. It will take many years before assets represented by these gifts and commitments are available to endow the Rotary Centers program. Therefore, the Plan consists of two five-year phases.

Phase I of the Plan will seek a minimum of US\$55million in named and endowed gifts by 30 June 2010 to help fill a projected revenue-funding gap. It will include at least four strategies:

- 1) continued efforts to seek restricted outright contributions of US\$60,000 or more in the form of named gifts for Rotary World Peace Fellows over the next five years from individuals;
- 2) identification and qualification of new prospects with the capacity to contribute outright major gifts and pledges of US\$500,000 or more to establish endowed Rotary World Peace Fellowships;
- 3) the training of a corps of volunteers to promote and solicit major gifts and commitments to the Rotary Centers; and
- 4) promotion of life income agreements, where supported by local laws, and Bequest Society commitments for the Rotary Centers.

It is estimated that approximately US\$50 million will be received during Phase I in Permanent Fund gifts, pledges, life income

協議及遺贈會承諾的形式捐獻約 5000 萬美元，另外 500 萬美元將以一次性冠名之扶輪世界和平獎學金形式捐獻。將開發行銷及訓練材料來支持主要義工及基金會辦事員在此一階段培養可能支持扶輪世界和平中心的人以及徵求其捐獻。

第二階段將尋求至少 4000 萬美元新的捐助及承諾，以保證計畫能長期延續下去。此一階段的焦點主要在於請第一階段所找出的合格且有能力一次捐獻 500,000 美元或以上的對象做出捐獻給永久基金以支持扶輪研究中心。第一階段包括發展各種培養策略以便在第二階段接近這些對象。第二階段也會提供時間來利用扶輪研究中心計畫今後的發展及強化。

#### 4. 義工網絡

自從 1990 年代中期成立永久基金行動以來，扶輪已經在扶輪社、地區、地帶及國際階層建立了一個龐大的扶輪社員網絡來為扶輪基金會籌募巨額捐獻。這些領導人包括：

- 現任及卸任的國際扶輪社長及扶輪基金會保管委員；
- 永久基金委員會；
- 地域扶輪基金會協調人 (RRFC)，此協調人負責在地帶為 TRF 募款之所有義工的整體協調；
- 巨額捐獻顧問；
- 年度計劃基金策略顧問；
- 扶輪基金會前受獎人協調人；
- 地區永久基金主委；
- 扶輪社的永久基金主委。

扶輪研究中心募款行動將利用並強化目前的義工架構。在此一義工架構的基礎之上來推動募款也有助於消除扶輪研究中心捐助之計畫與年度計劃基金之間為爭取捐助而產生的任何看得到或真正的競爭。如果鼓勵對年度計畫基金進行重大巨額捐獻的扶輪社員暫停他們對於「每個扶輪社員每年捐獻」的支持，或將那些捐獻轉捐給扶輪研究中心，這並非基金會之福。

地帶階層的資深扶輪領導人將作為核心網絡來推廣這項募款工作，並深入地帶及扶輪社。保守估計，地帶階層或以上承諾願意參與巨額捐獻募款的資深扶輪領導人數目為 250 人。該義工架構一開始的任務為協助找出所需要的巨額捐獻可能對象。緊接著將發展培養及徵求捐獻之策略。

#### 5. 訓練及其他資料

針對如何培養並徵求巨額捐獻給扶輪研究中心所做的額外訓練將是本計畫重要的一環，需要利用整個扶輪年度

agreements and Bequest Society commitments, with an additional US\$5 million in contributions for one-time named Rotary World Peace Fellowships. Marketing and training materials will be developed to support key volunteers and Foundation staff in cultivating and soliciting prospective supporters to the Rotary World Peace Centers during this phase.

Phase II will seek a minimum of US\$40 million in new endowment gifts and commitments to assure the program's long-term viability. This phase will focus primarily on the solicitation of qualified prospects who were identified during Phase I and who have the capacity to make outright contributions of US\$500,000 or more to the Permanent Fund in support of the Rotary Centers. Phase I would include the development of cultivation strategies for approaches to these prospects during Phase II. This second Phase would also provide time to take advantage of future developments and enhancements in the Rotary Centers program.

#### 4. Volunteer Network

Since establishing the Permanent Fund Initiative in the mid-1990s, a large network of Rotarians have been appointed, trained and supported at the club, district, zone and international level to raise major gifts for TRF. These leaders include:

- Current and past RI Presidents and Trustees;
- Permanent Fund Committees
- Regional Rotary Foundation Coordinators (RRFCs) who have responsibility for overall coordination of all volunteer fundraising efforts benefiting TRF at the zone level;
- Major Gifts Advisors;
- Annual Programs Fund Strategic Advisors;
- Rotary Foundation Alumni Coordinators;
- District Permanent Fund Chairs;
- Permanent Fund Chairs at the club level.

The Rotary Centers fundraising initiative will utilize and reinforce the current volunteer structure. Building upon this volunteer structure also helps eliminate any perceived or real competition between the plan to secure endowed support of the Rotary Centers and the Annual Programs Fund. The Foundation does not gain when Rotarians who make substantial major gifts to the Annual Programs Fund are encouraged to suspend their support of "Every Rotarian, Every Year" or redirect those gifts to the Rotary Centers.

Senior Rotary Leaders at the zone level will serve as the core network for promoting this fundraising effort and reaching into the districts and clubs. A conservative estimate of the number of Senior Rotary Leaders at the zone level or above with a commitment to major gift fundraising is 250. An initial task of the volunteer structure will be to help identify the major gift prospects needed. Developing cultivation and solicitation strategies will follow closely behind.

#### 5. Training and other materials

Additional training on cultivating and soliciting major gifts for the Rotary Centers will be a significant component of this plan and requires taking advantage of training and educational

所提供的訓練及教育機會，包括國際講習會、國際年會、地域扶輪基金會協調人訓練、委員會會議、以及地域扶輪基金會協調人為巨額捐獻顧問及地區永久基金主委所舉辦的訓練。

除了將關於扶輪研究中心巨額捐獻的特定資訊納入已在各層級實施的訓練之外，目前規劃將在2006-07年度開發在秘書處及各地域舉辦的特殊訓練課程。這些訓練將以根除小兒麻痺募款運動所舉辦的地域訓練為範本。

目前正在擬定一份行事曆，涵蓋這兩個階段內之巨額捐獻的可能通訊、重要活動、訓練機會、管理活動、任務及目標。這些活動將帶來活力、結合各方參與、並有助於將工作焦點放在找出、培養、並徵求捐獻給扶輪研究中心。

## 6. 巨額捐獻可能的對象及捐獻表

9500萬美元捐獻目標的達成有賴於扶輪基金會找出、培養及徵求有經濟能力且願承諾至少500,000美元之合格對象的能力。估計總款數的百分之75將來自最大的40筆捐獻。

附件A是為本計畫設計的巨額捐獻表。非營利組織通常都用捐獻表來達成特別巨大的捐獻募款目標。研究及經驗顯示，必須徵求5-8個巨額捐獻對象做出捐獻才能獲得一筆捐獻。考量到平均每徵求5個對象才有1個成功，所以必須準備500,000美元或以上之巨額捐獻提案並向200個合格的可能對象提出。

主要焦點將放在熱忱參與及對扶輪奉獻的扶輪社員個人。找出並徵求這群精英對象做出捐獻的好處是可以更瞭解這些支持者的特別興趣並予以正面回應，因為他們或許想支持基金會其他計畫。以捐獻選項及優先順序來和許多高層巨額捐獻對象來開始進行對話，可強化對TRF的整體捐獻及對其計畫之支持。

## 7. 冠名機會

鑒於巨額捐獻的捐獻人經常想知道他們的捐獻如何使用以及建立與他們支持的受益人之間的關係，目前已經為扶輪研究中心設立了幾個冠名機會，如附件B。

冠名機會也列於「和平是可能的」摺頁。這個出版品簡介扶輪研究中心的使命、目的及冠名機會，目的在於與巨額捐獻可能的對象分享這些資訊。

冠名機會的主要焦點在於取得捐助來支持扶輪世界和平獎學金學生。如已查明個別巨額捐獻的可能對象之偏好，且與本計畫的需求相輔相成，將可設立其他冠名機會。

opportunities presented throughout the Rotary year, including the International Assembly, the International Convention, Regional Rotary Foundation Coordinator training, Permanent Fund Committee meetings, trainings organized by Regional Rotary Foundation Coordinators for Major Gifts Advisors and District Permanent Fund Chairs.

In addition to incorporating specific information on major gifts for the Rotary Centers into the training already being done on multiple levels, the development of special training sessions to be held at the Secretariat and regionally during the 2006-07 Rotary year are being planned. Regional trainings conducted for the Polio Eradication Fundraising Campaign will serve as the model.

A calendar of possible communications, major events, training opportunities, stewardship activities, tasks and goals relating to the major gifts effort within these two phases is being developed. These activities will energize, involve and help focus efforts on identifying, cultivating and soliciting gifts for the Rotary Centers.

## 6. Major Gift Prospects and Gift Table

The achievement of the US\$95 million target hinges on TRF's ability to identify, cultivate and solicit qualified prospects with the financial capacity and commitment to contribute at least US\$500,000. An estimated 75 percent of the total funding will come from the 40 largest contributions.

Attachment A is a Major Gifts Table developed for the Plan. Gift tables are routinely used by non-profit organizations to reach a particular major gift fundraising objective. Research and experience shows that five to eight major gift solicitations must be made to secure one gift. Considering an average success rate of one gift per five solicitations, major gift proposals of US\$500,000 or more will have to be developed and presented to at least 200 qualified prospects.

The primary focus will be on individual Rotarians because of their involvement and commitment to Rotary. A positive benefit of identifying and soliciting this elite group of prospects is learning more about and responding positively to the special interests of these supporters who may wish to support other programs of the Foundation. Beginning a dialogue about gift options and priorities with many top-level major gift prospects will positively enhance overall giving and program support for TRF.

## 7. Naming Opportunities

Recognizing that major gift donors often like to know how their contributions will be used and to develop a relationship with the beneficiaries of their support, a number of naming opportunities for the Rotary Centers have been developed and included as Attachment B.

Naming opportunities are also included in the "Peace is Possible" brochure. This publication outlines the mission, purpose and naming opportunities for the Rotary Centers and was designed to share with major gift prospects.

The primary focus on naming opportunities is securing endowed support for Rotary World Peace Fellows. Additional naming opportunities will be developed as individual major gift prospect preferences are identified and can be matched with the needs of the program.

## 8. 基金發展進度

至 2008 年 12 月 31 日為止，未審核的財務報告顯示一次性捐獻總數達 1340 萬美元。此外，有 1330 萬美元（面值）已透過財產處分計畫及其他財務工具，承諾捐給扶輪研究中心。同時有 550 萬美元（面值）已透過終生收入協議限定用於支持扶輪研究中心。已有總數 3220 萬美元一次性捐給或承諾捐給本計畫。

## 9. 總結

在有新的能量及關注焦點的情況之下，捐助 120 個扶輪世界和平獎學金學生的長期策略頗為可行。前面簡介之計畫可加強目前的義工架構並且在基金會的基金發展工作之上繼續進步，包括採用「每個扶輪社員每年捐獻」訊息及遺贈會所獲得的動能。本計畫也承認在徵求巨額捐獻過程當中採用捐獻人為中心的方法的重要性。本計畫是否能發揮功效完全在於 TRF 是否有能力找出、培養及徵求 40 個 500,000 美元或以上的巨額捐獻。獲得這些重要的巨額捐獻將提升並促使基金會的整體基金發展工作進入新境界。最重要的是，扶輪研究中心計畫將有必要的經費來強化世界和平及瞭解。

## 8. Fund Development Progress

As of 31 December 2008 the unaudited financials show outright gifts totaling \$13.4. In addition, \$13.3 (face value) has been committed to Rotary Centers through estate plans and other financial vehicles. Also, \$5.5 million (face value) has been restricted to support Rotary Centers through Life Income Agreements. In sum, \$32.2 million has been given outright or committed to the program.

## 9. Summary

With renewed energy and focus, a long-term strategy for endowing 120 Rotary World Peace Fellows is feasible. The Plan outlined above reinforces the current volunteer structure and builds on the Foundation's fund development efforts, including the momentum gained with the "Every Rotarian, Every Year" message and the Bequest Society. It also recognizes the importance of using a donor centric approach in the major gift solicitation process. The effectiveness of the Plan will center on the TRF's ability to identify, cultivate and solicit 40 major gifts at or above US\$500,000. The acquisition of these significant major gifts will elevate and propel the Foundation's overall fund development effort into a new league. Most importantly, the Rotary Centers program will have the funding needed to enhance world peace and understanding.

### 附件A

## 扶輪研究中心巨額捐獻表

### Rotary Centers Major Gifts Table

目標：9500萬美元，每年資助120個扶輪研究中心獎學金學生

Goal \$95 million for 120 Rotary Center Fellows Per Year

捐獻數額級別 Gift Range	需要多少個巨額捐獻 # of Major Gifts Needed	單一級別總捐獻 Range Total	累計總捐獻 Cumulative Total	需要多少個合格的可 能對象 Qualified Prospects Needed
\$15,000,000	1	\$15,000,000	\$15,000,000	5
\$10,000,000	1	\$10,000,000	\$25,000,000	5
\$5,000,000	3	\$15,000,000	\$40,000,000	15
\$2,500,000	5	\$12,500,000	\$52,500,000	25
\$1,000,000	10	\$10,000,000	\$62,500,000	50
\$500,000	20	\$10,000,000	\$72,500,000	100
<b>Subtotal 小計</b>	<b>40</b>		<b>\$72,500,000</b>	<b>200</b>
\$250,000	70	\$17,500,000	\$90,000,000	350
\$10,000-\$250,000	250	\$5,000,000	\$95,000,000	1,250
<b>Totals 總計</b>	<b>360</b>		<b>\$95,000,000</b>	<b>1,800</b>

## 請支持扶輪國際和平及解決衝突研究中心

### An Invitation to Support The Rotary Centers for International Studies in peace and conflict resolution

#### 冠名機會

想支持扶輪中心活動的人將獲得冠名機會，這些活動包括獎學金、實地應用實習、討論會、研究及旅行補助、以及扶輪研究中心計畫的行政管理費用。

捐獻可指定給某一屆的扶輪世界和平獎學金學生，或永久基金之下的某一個捐助基金以提供永久支持。一次性的冠名捐獻可立即資助研究中心的一名或多名獎學金學生。對基金的捐助之本金永遠不會動用，但其收入的一部分將供特定的扶輪研究中心活動使用。

#### 捐助的資金

所有金額以美元計。

##### **\$1,500,000 - 扶輪世界和平獎學金**

大約每年可在一個扶輪研究中心捐助一個扶輪世界和平獎學金學生。捐獻人將收到關於獎學金學生、他們的實習或研究計畫、及他們就讀的學校的年度報告。

##### **\$750,000 - 扶輪世界和平獎學金**

大約每二年可在一個扶輪研究中心捐助一個扶輪世界和平獎學金學生。捐獻人將收到關於獎學金學生、他們的實習或研究計畫、及他們就讀的學校的年度報告。

##### **\$500,000 - 扶輪世界和平獎學金**

大約每三或四年可在一個扶輪研究中心捐助一個扶輪世界和平獎學金學生。捐獻人將收到關於獎學金學生、他們的實習或研究計畫、及他們就讀的學校的年度報告。

##### **\$250,000 - 實地應用經驗**

可在一個扶輪研究中心捐助最多10個實地應用實習或研究計畫給某一屆獎學金學生。捐獻人將收到關於獎學金學生、他們的實習或研究計畫、及他們就讀的學校的年度報告。

##### **\$1,000,000 - 扶輪研究中心訪問講師**

可捐助一個有外交經驗的講師，不論是在聯合國所屬機關或在和平及解決衝突的其他方面，在一個扶輪研究中心教授課程及擔任獎學金學生的導師。

##### **\$100,000 - 扶輪研究中心年度研討會**

可在一個扶輪研究中心捐助年度討論會。

#### Naming Opportunities

Naming opportunities are available to those who wish to support activities of the Rotary Centers, including fellowships, applied field internships, seminars, research and travel stipends, and the administrative expenses of the Rotary Centers program.

Contributions may be designated for a specific class of Rotary World Peace Fellows or for an endowed fund within the Permanent Fund to provide support in perpetuity. Outright named gifts provide current funding for one or more fellows at a center. The principal of an endowed fund contribution is never spent, but a portion of the earnings is made available for specific Rotary Center activities.

#### Endowed Funds

*All amounts shown in U.S. dollars.*

##### **\$1,500,000 - Rotary World Peace Fellows**

Endows one Rotary World Peace Fellow at a Rotary Center approximately every year. Donors receive annual reports on the fellows, their internship or research projects, and their study institution.

##### **\$750,000 - Rotary World Peace Fellows**

Endows one Rotary World Peace Fellow at a Rotary Center approximately every other year. Donors receive annual reports on the fellows, their internship or research projects, and their study institution.

##### **\$500,000 - Rotary World Peace Fellows**

Endows one Rotary World Peace Fellow at a Rotary Center approximately every three or four years. Donors receive annual reports on the fellows, their internship or research projects, and their study institution.

##### **\$250,000 Applied Field Experiences**

Endows up to 10 applied field internships or research projects for a class of Fellows at a Rotary Center. Donors receive annual reports on the fellows, their internship or research projects, and their study institution.

##### **\$1,000,000 - Rotary Center Visiting Lecturer**

Endows a visiting lecturer who has diplomatic experience, either with a United Nations agency or in some other aspect of peace and conflict resolution, to teach courses and serve as a mentor for fellows at one Rotary Center.

##### **\$100,000 - Rotary Center Annual Seminars**

Endows annual seminars at a Rotary Center.

### **\$50,000 -扶輪研究中心一般支援**

可捐助一個冠上捐獻人姓名的基金並對該計畫提供一般支援。

#### **一次性冠名捐獻**

所有金額以美元計。

### **\$60,000 -扶輪世界和平獎學金**

在一個扶輪研究中心資助一個冠名扶輪世界和平獎學金學生達2年。捐獻人將收到關於獎學金學生、他們的實習或研究計畫、及他們就讀的學校的年度報告。

### **\$50,000 -實地應用經驗**

可在一個扶輪研究中心捐助多達10個實地應用實習或研究計畫給某一屆獎學金學生並獲得冠名機會。

#### **捐獻方式**

扶輪基金會平常皆可接受現金、股票、房地產、終生收入協議、壽險、巨額捐獻承諾以及列入最終房地產處置計畫之承諾等種類之捐獻。

關於冠名及捐獻方式的詳細資訊，請洽扶輪基金會。

### **\$50,000 - Rotary Center General Support**

Endows a fund bearing the donor's name and provides general support to the program.

#### **Outright Named Gifts**

All amounts shown in U.S. dollars.

### **\$60,000 - Rotary World Peace Fellow**

Funds a named Rotary World Peace Fellow at a Rotary Center for up to two years. Donors receive annual reports on the fellows, their internship or research projects, and their study institution.

### **\$50,000 - Applied Field Experiences**

Names up to 10 applied field internships or research projects for a class of fellows at a Rotary Center. Donors receive information on the recipients, their internships or research projects, and their study institution.

#### **Ways of Giving**

The Rotary Foundation routinely accepts gifts of cash, stock, real estate, life income agreements, life insurance, major gift pledges and commitments incorporated into final estate plans.

For more information on naming and ways of giving, please contact The Rotary Foundation.



## 基金發展 FUND DEVELOPMENT

### 有關捐獻的最新消息

#### Contributions Update

到 2007 年 12 月 31 日為止的 6 個月中，捐獻總額達 168,712,100 美元，較去年增加了 211.77%。這麼好的成績不單是因為扶輪社員慷慨的捐獻增加了，更重要的是因為比爾及梅林達蓋茲基金會和 Google 分別為根除小兒麻痺等疾病計劃捐獻了 1 億美元和 350 萬美元。年度計劃基金捐獻增了 13.74% ，達 45,453,466 美元。永久基金捐獻增了 25.38% ，達 7,844,000 美元。限定用途捐獻增了 21.01% ，達 8,236,106 美元（其中包括根除小兒麻痺等疾病夥伴計劃的捐獻）。下列的「非限定用途」是有關捐獻者建議基金的項目。

Contributions for the six months ending 31 December 2007 totaled US\$168,712,100, up 211.77% over last year! This is a direct result of both an increase in Rotarian contributions to TRF programs overall and more significantly, the \$100 million contribution from the Bill and Melinda Gates Foundation and the \$3.5 million received from Google to PolioPlus. Contributions to the Annual Programs Fund increased 13.74% to US\$45,453,466. Contributions to the Permanent Fund increased 25.38% to US\$7,844,000. Restricted giving increased 21.01% to US\$8,236,106: this includes US\$983,159 in PolioPlus Partners contributions. The "Unrestricted – Other" line pertains to the Donor Advised Fund.

	2007 年 11 月	2006 年 11 月	增/ (減) 率
年度計劃基金	45,453,466 美元	39,962,405 美元	13.74%
小兒麻痺等疾病	105,840,528 美元	1,088,682 美元	9621.90%
永久基金	7,844,000 美元	6,256,414 美元	25.38%
<u>限定用途</u>	<u>8,236,106 美元</u>	<u>6,806,070 美元</u>	<u>21.01%</u>
<b>小計</b>	<b>167,374,100 美元</b>	<b>54,113,571 美元</b>	<b>209.30%</b>
非限定用途-其他	<u>1,338,000 美元</u>		
<b>合計</b>	<b>168,712,100 美元</b>	<b>54,113,571 美元</b>	<b>211.77%</b>

社長當選人訓練會 (PETS)，以及設定扶輪社捐獻目標

#### **PETS and CLUB GOAL SETTING**

國際講習會已過，所有的地區總監當選人都自聖地亞哥回國開始準備社長當選人訓練會的事宜。這個時期正是您聯絡地區總監當選人的好機會，幫助他們解決在國際講習會的疑問，提供您對社長當選人訓練會以及來年度的指導。請提醒地區總監當選人在社長當選人訓練會上收集 2008-2009 年度基金發展扶輪社捐獻目標報告表的重要性。地區總監當選人應在 2008 年 5 月 1 日以前收齊所有的捐獻目標報告表，並將報告表在 2008 年 5 月 15 日以前寄抵扶輪基金會。請務必遵守截止日期。因為基金會保管委員將憑所集的報告表計算在國際年會上發表的年度計劃基金世界性目標。

With the International Assembly now history, all DGEs are returning home from San Diego, California, USA and are finalizing their preparations for their upcoming PETS. This is an ideal time to contact the DGEs in your zone to clarify any questions they may have following the Assembly and offer your guidance for PETS as well as in the coming year. Please remind all your DGEs about the importance of collecting their 2008-2009 Fund Development Club Goal Report Forms at PETS. All Goal Forms should be in the hands of the DGEs by 1 May 2008 and forwarded to the Secretariat no later than 15 May 2008. This timing is critical as the Trustees use the Clubs' Goal Report Forms to set the Worldwide Annual Programs Fund Goal each year for announcement at the Convention.

社長當選人已在 11 月接獲他們的扶輪社捐獻目標報告表。另外，在「2008-09 年度，每位扶輪社員，每年扶輪社成功要訣工具袋」裏也附上了一份這個報告表。此表亦可自下列網頁以九種語言下載：

[http://www.rotary.org/RIdocuments/en\\_pdf/erey\\_club\\_goal\\_report\\_form08\\_en.pdf](http://www.rotary.org/RIdocuments/en_pdf/erey_club_goal_report_form08_en.pdf)

All club presidents-elect received a copy of their Club Goal Report Forms in November; a second copy was included in their 2008-09 EREY Club Success Kit and the Goal Forms are available for download in nine languages using the following link:

[http://www.rotary.org/RIdocuments/en\\_pdf/erey\\_club\\_goal\\_report\\_form08\\_en.pdf](http://www.rotary.org/RIdocuments/en_pdf/erey_club_goal_report_form08_en.pdf)

#### 扶輪信用卡

#### **Rotary Affinity Credit Cards**

多虧扶輪社員利用扶輪 Master Card 或扶輪 American Express 信用卡，基金會在 2007 年 11 月接到了 550,000 美元的專利權使用費。有關扶輪信用卡的詳情請上網：<http://www.rotary.org/en/Pages/creditcard.aspx>。自扶輪信用卡計劃在 2000 年 9 月開始實施以來到目前為止，扶輪基金會已獲將近 6,000,000 美元的專利權使用費。

In November 2007, the Foundation received US\$550,000 in royalty proceeds for the Permanent Fund as a result of Rotarians using their Rotary Master Card and/or Rotary American Express credit cards. To learn more about the Rotary affinity credit card, please visit the website at: <http://www.rotary.org/en/Pages/creditcard.aspx>. To date, TRF has received nearly US\$6,000,000 in royalties since the inception of the program in September 200



## 人道獎助金計劃 HUMANITARIAN GRANTS PROGRAM

### 瘋狂的 3 月 March Madness

3 月 31 日提交獎助金申請表的截止日期日趨接近，人道獎助金計劃部門的職員已開始準備應付這「瘋狂的 3 月」。每一個扶輪年度，約有 50% 的獎助金申請表是在 2 月份及 3 月份寄抵的。這個期間處理申請表的數量大增。請您鼓勵扶輪社將人道獎助金申請表趁早提交以免遭到處理上的延遲。

As we enter the New Year and approach the 31 March grant application submission deadline, Humanitarian Grants staff members are gearing up for "March Madness." In any given Rotary year, approximately 50% of all grant applications are received in February and March. Consequently, application processing times are elevated during this period. Please encourage clubs in your area to submit applications for Humanitarian Grants as soon as possible to avoid the "March Madness" delays.

### 配合獎助金申請表和配合獎助金指南更新

#### **Revised Matching Grant Application and Guide to Matching Grants**

為了符合保管委員會的決議將申請競爭性配合獎助金的截止日期從 1 月 1 日改為 12 月 15 日，以及追加要求地區總監批准地區指定用途基金的使用，「配合獎助金申請表」和「配合獎助金指南」更新了。新版的刊物可在 2008 年 4 月自 RI 網站取得。

Due to recent Trustee decisions impacting Matching Grants (change in competitive Matching Grant deadline from 1 January to 15 December and addition of district governor authorization for use of DDF), the Matching Grant application and The Guide to Matching Grants are being updated. The revised publications will be available on the RI Web site in April 2008.

### 獎助金報告逾期未交的名單 Overdue Grant Reporting List

載在扶輪網站獎助金報告逾期未交名單的是至少有 21 個月未盡提交報告之責的扶輪社。由於逾期未交，它們成為不可靠的合夥對象。這個名單每 3 個月更新一次。但是，在 12 月時，因電腦技術的問題，這個名單暫時停載。最新的名單將在 2008 年 1 月下旬上載。此名單可取自

<http://www.rotary.org/en/ServiceAndFellowship/FundAProject/StewardshipAndReporting/Pages/ridefault.aspx>。

The clubs listed on the Overdue Grant Reporting List on the RI website have not fulfilled their reporting requirements for at least 21 months and have been identified as partners whose reliability can't be verified. The list is updated quarterly, however, due to technical difficulties, the list was temporarily removed from the website in December 2007. The updated list will be posted late in January 2008. You will be able to access this list at

<http://www.rotary.org/en/ServiceAndFellowship/FundAProject/StewardshipAndReporting/Pages/ridefault.aspx>.

### 人道獎助金成功故事 Humanitarian Grants Success Stories

人道獎助金部門的雇員常常接到扶輪基金會地域協調人和其他領導人的要求，希望雇員提供他們人道獎助金的成功故事，以備用於有關扶輪基金會的演講稿中。因此，Coordinator Communiqué 中每一個月將涵蓋新的故事。請利用這些故事及照片向地帶的扶輪社員解釋扶輪基金會的各項活動計劃。

Humanitarian Grants staff members are often asked to provide grants success stories that RRFs and other leaders can use when speaking about TRF. Therefore each month, a new story will be included in the Coordinator Communiqué. Feel free to use these stories and accompanying photos as you speak with Rotarians in your zone about TRF.

## 墨西哥的保健暨衛生活動計劃

墨西哥（第 4130 地區）的 Rio Bravo 扶輪社和美國德州（第 5930 地區）的 Weslaco 扶輪社爲了在墨西哥的 Rio Bravo 實施保健暨衛生計劃，獲得了第 99-27 號案件的保健，防飢與人道（3-H）獎助金。Rio Bravo 市離德州邊界不到 5 哩，人口 10 萬。這個城市因爲有大量在工廠工作者移入，人口迅速增加。政府資源應付不及。在這種情況下，成千的家庭被迫在沒有安全的飲用水也沒有妥當的衛生設備，且遠離醫療設備的地方居住。即使存在的公立醫院和診療所也因拮据的財政預算只能提供最基本或最緊急的醫療業務。



3-H Grant 99-27 was awarded to the Rotary Clubs of Rio Bravo, Mexico (D4130) and Weslaco, Texas, USA (D5930) to implement a Health and Sanitation project in Rio Bravo, Mexico. Rio Bravo is a town of 100,000 located less than 5 miles from the Texas border that has sprung up quickly as people move into the area in search of factory jobs. Government resources are stretched far beyond their capacity. Under these circumstances, thousands of families are forced to locate well outside the reach of the city's safe water and sanitation systems and far from medical facilities. Public hospitals and clinics that do exist, strapped by tight budgets, are able to provide only the most basic or urgent medical services.

考慮到當地情況如此嚴重，Rio Bravo 和 Weslaco 兩扶輪社，接獲一個叫 Curamericas 的團體的幫助，企畫了回應當地社區保健所需的計劃。也就是要建立一個保健診所。美國的一個教會團體捐助這個計劃，爲它採購建築材料，並赴 Rio Bravo 蓋診所。加上 300,000 美元的 3-H 獎助金資助，這個診所設置了提供社區基本醫療業務的器材和用品。也因此，這個診所得以每週開業 5 天（從早上 8 點到晚上 8 點）爲社區居民服務。診所的工作人員包括一名藥劑師，一名經理，一名牙醫，兩名醫生，一名管家以及六名護士。

Considering the gravity of the situation, the Rotary Clubs of Rio Bravo and Weslaco, with the assistance of an organization called Curamericas, developed a project to address the community's health needs—establishment of a health clinic. A church group in the USA contributed to the project, purchasing construction materials and traveling to Rio Bravo to build the clinic. With \$300,000 of 3-H Grant funds the clinic was equipped and supplied to provide basic medical services in the community. The clinic is open 5 days a week from 8 am until 8 pm and has a pharmacist, an administrator, a dentist, two medical doctors, a house keeper and six nurses on staff.

這些護士是這個計劃的心臟與靈魂。她們定期做家庭訪問，每一位護士對所負責的家庭都很盡責，管理他們的健康。洛佩茲太太（見照）在整個懷孕期間接受了護士的數次訪問。在她生了兒子米凱爾後回家，兩天以內就有護士來追跡訪問。因為米凱爾的家人已經和護士建立了好關係，信任她，洛佩茲太太不拘向護士表示憂慮米凱爾的健康情形。護士檢查了嬰兒之後也有同樣的憂慮，將情況報告給診所的醫生後，遵照吩咐，即刻回到洛佩茲的家要他們把米凱爾盡快帶來診所。醫生檢查了嬰孩後，馬上把他送去照腹部的 X 光。

These nurses are the heart and soul of the project. The nurses regularly visit homes and are always vigilant about the health conditions of the families they are assigned. Mrs. Lopez, seen in the photo below, received several visits by the nurses throughout her pregnancy. Within a couple of days of returning home after the birth of her son, Miguel, the nurse made her first follow-up visit to the family. Because of the trust relationship she had built with the family, Miguel's mother was able to express her concerns about the little boy's health. The nurse examined the baby and shared the mother's concerns with the medical doctor at the Rotary-funded clinic. At the request of the doctor, the nurse went back to the Lopez home to tell them to take Miguel to the clinic as soon as possible. Upon examining the baby, the doctor sent the child straight to a laboratory for x-rays of the boy's abdomen.

次日早上，靠診所的介紹，一家人帶赴途蒙特瑞去見專家。兩天後，經過了小腸和直腸的重建手術的小男孩拾回差一點失去的生命。雖然，護士們花多半的時間在教育，爲嬰孩量體重，鼓勵母親改變素來的飲食及衛生習慣，預防疾病的工作上，但是，偶爾也有護士因爲和社區居民有親密的關係，而且對所負責的家庭有充分的了解，而能拯救小孩的性命，防止母親心碎的好故事出現。

The next morning the family was on the way to Monterrey to see a specialist with a referral from the clinic. A couple of days later the boy's lower intestine and colon were reconstructed, giving him a chance at life that he otherwise surely would not have enjoyed. While the majority of the nurses' time is spent teaching, weighing babies, and encouraging mothers to make changes to their families' eating and hygienic habits to prevent disease, this is a specific case where their intimate and knowledge of the households in their neighborhood saved a child's life and a mother's grief.

## 根除小兒麻痺等疾病計劃 POLIOPLUS

### 一月的開放計劃名單 January Open Projects List

根除小兒麻痺等疾病夥伴計劃預期在 2007-08 年度內將會收到 5 百多萬美元的計劃要求。一月份的開放名單涵蓋 5 個根除小兒麻痺計劃，所需款是 1,293,128 美元。請利用這個名單向他人解釋根除小兒麻痺等疾病夥伴計劃仍迫切需要支援。要下載一月份的開放計劃名單，請點選

[http://www.rotary.org/RIdocuments/en\\_pdf/ppp\\_openprojects.pdf](http://www.rotary.org/RIdocuments/en_pdf/ppp_openprojects.pdf)。

The PolioPlus Partners program expects to receive over US\$5 million in project requests in 2007-08. The January Open Projects List (OPL) contains five (5) polio eradication projects in need of a total US \$1,293,128. Please use the OPL as a resource to communicate the continued, urgent, and significant needs of PolioPlus Partners. In an effort to keep the download size to a minimum, please click on the following Web link to download the January OPL: [http://www.rotary.org/RIdocuments/en\\_pdf/ppp\\_openprojects.pdf](http://www.rotary.org/RIdocuments/en_pdf/ppp_openprojects.pdf).

根除小兒麻痺等疾病夥伴計劃有賴個人，扶輪社以及地區的資金支援提供今年度所有的計劃要求。凡在 2007 年 12 月 1 日到 2008 年 6 月 30 日期間捐獻根除小兒麻痺等疾病夥伴計劃的現款或地區指定用途基金的捐款，都將計入蓋滋基金會的挑戰獎助金。2007-08 年度捐獻根除小兒麻痺等疾病夥伴計劃的現金和地區指定用途基金的捐款，每捐美金 1 元仍將接到美金 50 分的配合。

PolioPlus Partners is counting on individual, club and district fundraising efforts to provide full funding for all project requests this year. Cash and DDF donations to PolioPlus Partners, effective 1 December 2007 through 30 June 2008, will be counted towards matching the Gates Foundation Challenge Grant. 2007-08 cash and DDF donations to PolioPlus Partners will continue to be matched US\$.50 for every \$1.00 contributed.

蓋滋基金會的挑戰，改稱「**扶輪的 1 億美元挑戰**」。

The challenge has been renamed as *Rotary's \$100 Million Challenge*.



*William Gates Sr., cochair of the Bill & Melinda Gates Foundation*

## 教育計劃 EDUCATIONAL PROGRAMS

### 扶輪國際研究中心

Rotary Centers for International Studies

### 扶輪世界和平獎學金 - 徵募研究生 Rotary World Peace Fellowships - Recruitment

申請 2009-11 年期的扶輪世界和平獎學金的截止日期是 2008 年 7 月 1 日。請幫助您的地區利用下列資訊徵募符合申請資格的候選人：

The application deadline for 2009-11 Rotary World Peace Fellowships is 1 July 2008. Help your districts recruit qualified applicants by sharing the following recruitment tips:

請查您的社區或市內是否有下列事宜：

Check with the following in your town or community:

- 設有國際關係學、政治學、以及和平學等科系的大專院校
- 參與人權、救災、撥配援助資源、倡導環保、難民問題、仲裁以及調停的非政府組織
- 國際組織和企業
- 政府機構、外交使節團、警察局或軍部辦事處
- 以歸國的和平部隊等義工人員為對象召開的會議
- 大學校友會和大學就業或職業推薦部門

- 曾研讀和平以及解決衝突課程而現職國際組織機構的扶輪基金會大使獎學金前受獎人
- Department of international studies, political science, or peace studies at local universities/colleges
- Nongovernmental organizations involved in human rights, disaster relief, aid distribution, environmental advocacy, refugee issues, mediation, and arbitration
- International organizations and corporations
- Governmental agencies, diplomatic corps, and local police and military offices
- Peace Corps meetings for returned volunteers
- University alumni associations and university placement or career offices
- Former TRF Ambassadorial Scholars who studied peace and conflict resolution and now work in international arenas

扶輪社和地區可以以下列方式推動獎學金吸引候選人：

Clubs and districts might also attract candidates by promoting the fellowship in these ways:

- 在上述機構組織或地點召開說明會
- 主辦關係和平，國際理解的演講會或討論會，並邀請上述組織的代表
- 邀請和平獎學生或前受獎人在以扶輪社員及非社員為對象的資訊提供會演講
- 在扶輪和平獎學金小冊附上您的聯絡資訊，發送給有關的機構組織和部署
- 發新的新聞稿給地方和地域性的刊物，大學新聞，電臺，以及一般市民可收看的有線電視臺
- Hold informational meetings at the organizations and locations listed above.
- Host lectures or discussions relevant to peace or international understanding, and invite representatives from the organizations listed above.
- Invite current or former peace fellows to speak at informational meetings for Rotarians and non-Rotarians.
- Send out Rotary World Peace Fellowship brochures to relevant organizations and agencies in your area with your contact information included.
- Issue news releases to local and regional publications, university newspapers, radio stations, and public-access cable television stations.

### 第二次的扶輪世界和平學術座談會 *Second Rotary World Peace Symposium Announced*

基金會保管委員會批准在英國伯明罕召開的 2009 年國際年會前舉辦附屬年會的第二次扶輪世界和平學術座談會。有了詳情將逐一報告各位。

The Trustees have approved the second Rotary World Peace Symposium, to be held in conjunction with the 2009 RI Convention in Birmingham, England. More details will follow as information becomes available.

### 新畢業生 *New Graduates*

恭賀自崑士蘭大學和薩爾瓦多大學畢業的第四期研究生，以及自佈拉特福畢業的第五期研究生。他們列入了在世界各地從事促進和平，解決衝突的 200 多名的畢業生聯絡網。

Congratulations to Class IV UQ and USAL fellows and Class V Bradford fellows on their graduation. They now join a network of more than 200 alumni working around the globe on issues related to peace and conflict resolution.

### **扶輪和平及衝突研究計劃**

Rotary Peace and Conflict Studies Program

2008 年 1 月班次開課

January 2008 Session Begins

研習期間為 2008 年 1-4 月的扶輪和平及衝突研究計劃將在 2008 年 1 月底開課。19 名來自 11 個國的 9 種不同行業的研習生將參加這個班次。他們的平均就業年數是 12 年。2008 年 4 月，他們將在曼谷召開的公開講習會中發表他們的學習經驗的一部分。

The January-April 2008 Rotary Peace and Conflict Studies Program session begins in late January 2008. 19 professionals from 11 countries representing 9 different industries with an average of 12 years work experience will become the fourth RPCS Program class. They will present portions of their learning and experiences at a public seminar in Bangkok on 10 April 2008.

### 研習生特寫 *Featured Participant*

法爾德·帕法歐上尉來自巴西，是第 4430 地區 Sao Paulo-Vila Alpina 扶輪社贊助的 2008 年 1 月班次研習生

他說，「我相信這個計劃能提供更好的工具和技能讓我改善在人口密集的低收入地區從事防止災犯和回應緊急事件的能力。我也深信這個研習經驗對我將來的計劃很重要。將來，我意圖和無國界的統一消防隊員（United Firemen Without Borders）非政府組織合作，開發關係受嚴重天災襲擊區域的工作。這些絕大多數的區域都經驗各式各樣的衝突。」

Cpt. Valdir Pavao, Brazil, January 2008 session, sponsored by the Rotary Club of Sao Paulo-Vila Alpina, District 4430

Valdir writes, "I believe the program will provide me with the tools and expertise I need to improve my skills in preventative action and to deal with emergencies arising from housing conditions in low income population areas and all the adversities existing in these areas. I also believe the program will be of great importance to the work I intend to develop with the NGO United Firemen Without Borders, related to emergencies in regions struck by natural catastrophes, which in their majority experience all sorts of conflicts."



### 大使獎學金及扶輪大學教師獎助金

Ambassadorial Scholarships and Rotary Grants for University Teachers

#### 2008-09 年度大使獎學金手冊和資訊 *Acceptance Packet and Handbook for 2008-09 Ambassadorial Scholars*

2008-09 年度的大使獎學金受獎人將在 2 月收到領受獎學金的資訊袋，獎學金手冊也將包括其中。這三年來的寄出的獎學金手冊都是光碟。受獎人在收到這些資訊後必須安排出席出國講習會。我們也利用幾重方式（亦即，發函地區總監表示收到了來自該地區的申請表，將在 2008 年 3 月寄給贊助輔導員聯絡受獎人的信函）鼓勵贊助地區幫助受獎人安排出席講習會。有關 2008 年地域獎學生講習會的資訊已載下列國際扶輪網站：

<http://www.rotary.org/en/StudentsAndYouth/EducationalPrograms/AmbassadorialScholarships/Pages/About.aspx>

2008-09 Ambassadorial Scholars will receive their scholarship Acceptance Packets in February, including the Scholar Handbook, which for the third year in a row is being sent as a CD-ROM. Again this year, scholars are required to schedule attendance at an outbound scholar orientation seminar upon receipt of their packet. Sponsor districts are also encouraged to assist scholars in doing so through various communications (i.e. mailing to District Governors acknowledging receipt of the 2008-09 Scholarship Applications from their districts; mailing to Sponsor Counselors scheduled for March 2008). 2008 Regional Scholar Orientation Seminar information is posted on the Rotary International website at:

<http://www.rotary.org/en/StudentsAndYouth/EducationalPrograms/AmbassadorialScholarships/Pages/About.aspx>

教育計劃的職員借此歡迎新任職的獎學金經理 Brad Lauman。就職扶輪基金會之前，Brad 在 Arcadia 大學海外留學中心任職負責中部州區域的助理主任。印地安那州出身的他是 1981-82 年度到西班牙 Complutense de Madrid 大學留學的大使獎學金受獎人。Brad 是伊利諾州 Rockford 扶輪社的社員。

The Educational Program staff would like to welcome new Scholarships Department Manager Brad Lauman. Brad comes to TRF from Arcadia University's Center for Education Abroad, where he served as Assistant Director for the Central States Region. Originally from Indiana, Brad served as an Ambassadorial Scholar at the Universidad Complutense de Madrid, Spain, in 1981-82. Brad is a member of the Rotary Club of Rockford, Illinois.

#### 低收入國家獎學金集用基金 *Scholarships Fund Pool for Low-Income Countries*

鼓勵所有的地區，不論其收入的高低，在計劃如何利用 2009-10 年度的地區指定用途基金時，將之捐獻集用基金。款額不拘。凡地區以及在處於地區內的低收入國家每年都能提交一名的申請表參加集用基金支付的大使獎學金篩選。這個獎學金的名額以 32 名為上限。所有的申請表都由保管委員會任命的篩選委員會基於世界性的評比審查。提交申請表的截止日和所有 2009-10 年度的大使獎學金申請表一樣，是 2008 年 10 月 1 日。

負責人為資源發展上級主管（Resource Development Senior Supervisor）Renée Stephenson（電話：1-847-866-3314，傳真：1-847-866-0934，電子郵件：Renee.Stephenson@rotary.org）。

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 2009-10. All districts and each low-income country within a district may submit one scholarship application to compete for up to 32 Ambassadorial Scholarships awarded annually through the fund pool. A Trustee-appointed selection committee considers all applications on a world-competitive basis. The deadline to submit applications is the same as for all 2009-10 Ambassadorial Scholarship applications:

1 October 2008. Contact: Renée Stephenson, Resource Development Sr. Supervisor, tel: 847-866-3314; fax: 847-866-0934; email: Renee.Stephenson@rotary.org.

## 團體研究交換

Group Study Exchange

### 2008-09 年度旅程資訊表 2008-09 Travel Information Forms

旅程資訊表必須在 2008 年 1 月 1 日以前寄抵扶輪基金會。尚未提交此表的地區，請儘快以傳真(847-556-2143)或電子郵件(gse@rotary.org)送來。如果地區無法與 2008-09 年度的配對地區溝通，請與負責地區的職員聯絡要求幫助。

Travel Information Forms were due to TRF by 1 January 2008. For those districts that have not submitted their travel information forms, we ask that you do so as soon as possible by fax at

847-556-2143 or email gse@rotary.org. If your district is not able to communicate with your 2008-09 partner district, please contact your coordinator at TRF for assistance.

希望所有的地區總監當選人都在 2008 年國際講習會中有機會討論了他們的團體研究交換計劃。如總監當選人自聖地亞哥回國後有任何有關團體研究交換的疑問，請與團體研究交換部門聯係。

We hope that all district governors-elect were able to discuss their GSE planning during the 2008 International Assembly. Should governors-elect have any GSE-related questions after returning from San Diego, please do not hesitate to contact the GSE department. Rotary Centers for International Studies

### 互動式的團體研究交換出發前文件 Interactive GSE Pre-departure Documents

提醒地區所有有關團體研究交換出發前文件(團長和團員的申請表，醫療和保險表格，以及旅程資訊表)都可以互動方式填寫提交。唯填寫 2007-08 旅行年度的表格，則請打字。團體研究交換光碟所收錄的包括所有不同的互動方式表格。但是，如有需要的話，請向 GSE 協調職員索取互動式的表格。

Districts are reminded that all GSE pre-departure documents (team leader and member applications, medical and insurance forms, and travel information forms) are currently available in interactive format. The GSE department asks that teams submit typed pre-departure documents for the 2007-08 travel year. All formats are available in interactive format on the GSE CD-ROM; however, please contact your district's GSE coordinator for interactive files, should you require them.

### 出發前文件的截止日期 Pre-departure Document Deadline

提醒地區，所有文件必須在各團體研究交換團隊出發預定日的 45 天以前抵達扶輪基金會。請各地區將文件用電子郵件或傳真(847-556-2143)發送給協調職員。要所有文件齊全無誤，團隊才能收到差旅部門的確認書。

Districts are reminded that all pre-departure documentation is due to TRF no less than 45 days prior to each GSE team's scheduled date of departure. Districts are encouraged to submit documentation electronically either via e-mail to your district's coordinator or via fax at 847-556-2143. Teams will not receive confirmed RITS travel itineraries until all documentation is complete.

### 地主國日程表 Host Itineraries

團體研究交換部門繼續嚴格執行接待團體研究交換團隊的地主國必須提交完整的地主國日程表的規定。地主國必須將此日程表在訪問團隊出發預定日的至少兩個月前提交贊助地區和扶輪基金會。贊助地區必須在接到此表後批准此日程，團隊才能購買機票。地主國日程表必須涵蓋每一個職業活動日的詳細計劃。團體研究交換主委和團長必須和團員商討活動日程是否妥當，並得獲得團員的贊同。

The GSE department continues to strictly enforce submission of a complete host itinerary as a pre-departure document for districts hosting a GSE team. Host itineraries are due to the sponsor district and to TRF at least two months prior to the team's scheduled date of departure. Sponsor districts must receive and approve proposed host itineraries before team travel tickets can be purchased. Host itineraries should include details about each planned vocational day. GSE chairs and team leaders should discuss the itineraries with their team in order to ensure that the team members agree to the agenda.

### 團體研究交換的還付 GSE Reimbursements

地區提交 2007-08 年度的旅行還付申請時，必須為需要還付的項目附上一份電子匯兌表格(Electronic Fund Transfer-EFT Form)。國際扶輪將依此表的資訊直接以電子方式匯款地區。電子匯兌表格亦收錄在 GSE 光碟中。如地區對此手續或填寫表格有任何疑問，請與扶輪基金會的 GSE 協調職員聯係。

As districts submit GSE reimbursements for the 2007-08 travel season, they are reminded that each district must submit an Electronic Fund Transfer (EFT) Form along with the associated reimbursement items. Rotary International will use this information to reimburse districts electronically via direct deposit. The EFT Form can be found in interactive format on the GSE CD-ROM. Should your district have any questions about this procedure or the completion of the EFT Form, please contact your GSE coordinator at TRF.