

Paul Harris Society – District Guide

The benefits of establishing a Paul Harris Society

The Paul Harris Society (PHS) is a way to enhance and increase Annual Programs Fund support in your district. Annual giving is a key component by which Rotarians can fulfill their commitment to international service. Increased annual giving also means additional district funds become available to support local and district driven projects through District Designated Funds (DDF).

Most large charities recognize different levels of annual giving. Until the official adoption of the Paul Harris Society, The Rotary Foundation only recognized Rotary Foundation Sustaining Member contributions as an annual recognition. The Paul Harris Society creates a new recognition level for those Rotarians who have the capacity and the desire to make a significant gift to The Rotary Foundation each year.

“If 10% of your members become PHS members, then your district’s overall giving is at \$100 per member before you even talk to the other 90% of your membership!”

*John Rasmussen
RRFC, Zone 23*

Districts with established Paul Harris Societies are finding that contributions from their PHS members can constitute 10%-20% of their total annual giving. Having an active Paul Harris Society can ensure long-term growth in annual per capita contributions and secure more funds coming back to your district.

Your keys to success are:

- Establishing a structure that will sustain your Paul Harris Society for years to come
- Ongoing promotion of the Paul Harris Society, special events and recognition efforts

“The position of Paul Harris Society coordinator requires a dedicated Rotarian to see the program get implemented over a two to three year period. After several years of sustained marketing and follow-up, this program tends to take on a life of its own ... and gets easier to oversee.”

*Wayne Cusick, PDG District 5340
Founder of the Paul Harris Society*

Getting started

- **Secure a commitment from your district leadership to fully support and promote a PHS in your district:** Discuss the idea with district chairs, past district governors, assistant governors and Foundation mentors to gain initial buy-in. Each of these past and present leaders should be invited to become a charter member.
- **Identify a team and their responsibilities:** Districts that have successfully launched a Paul Harris Society have asked a volunteer to serve as a dedicated district Paul Harris Society coordinator. Working with the District Rotary Foundation Chair and the Annual Giving Subcommittee Chair, the primary role of the coordinator is to coordinate the efforts of a team of solicitors, encourage broad participation, and arrange for a membership charter event and ongoing annual recognition events. Another member on the PHS committee may be asked to actively manage the PHS membership data base, keeping track of new members and ongoing contributions.
- **Set the stage with a charter event:** Set a date that won't conflict with other district events, find a location that is central and appealing, and bring in an outstanding keynote speaker. Promote this prestigious event to attract charter members. At the event, be sure to present charter membership certificates, the PHS insignia (pin), and a thank you letter from the district governor. A successful event will automatically attract new members.
- **Ensure ongoing promotion of PHS:** Promote the PHS during district Foundation presentations in August and September. Encourage assistant governors to do the same during their club visits. Continue promoting your PHS at district Foundation and donor recognition events. Use your district Web site and district newsletters to raise the profile of the PHS.
- **Follow-up annually:** Thanking your supporters is a key element to helping ensure their recurring support: contact PHS members early in the Rotary year to thank them for their contribution and remind them to send in their gift for the current year. Thank you notes from the current district governor and district foundation chair adds a nice touch.

Continue to host annual PHS recognition events to raise the profile of the PHS in your district, thank your supporters, and build on your success in annual giving. The audience for Paul Harris Society recognition events often reaches beyond those Rotarians who already attend district functions and seminars.

Taking the Next Steps

Once your district has the proper structure and leadership in place, work with your Club Foundation Chairs and Foundation staff to identify potential prospects.

Become familiar with the guidelines proposed by the Trustees of The Rotary Foundation for qualifying gifts: any US\$1000 outright gift towards the Annual Programs Fund, PolioPlus Partners and Humanitarian Grants.

A number of districts promote \$100 per month through TRF-DIRECT (*US and Canada only*) to assist the PHS volunteers with the membership renewal process.

From a district perspective, support of the Annual Programs Fund is preferable, because it:

- helps meet EREY club and district per capita goals
- counts towards Sustaining Membership
- increases the amount of future District Designated Funds

Use the PHS as a platform to steadily develop new major donors in your district and build the capacity for significant major gifts and bequests.

"I find it easier to make a \$85 or even a \$100 monthly contribution through TRF-DIRECT than to make a one-time \$1,000 annual gift.

Because it happens automatically, the money gets to the Foundation in a timely and cost effective manner."

*Chris Reilly
PDG District 6450
Strategic Advisor, Zone 27*

PHS District Resources

- Paul Harris Society brochure (099-EN): *PDF available for download at www.rotary.org. The brochure provides a description of the PHS along with guidelines and exceptions.*
- Membership certificate for charter members and new members: *available for download at www.rotary.org.*
- TRF-DIRECT brochure (998-EN): *PDF available for download at www.rotary.org (US and Canada only).*
- PHS insignia (pins) are available to order in the US and Canada through:

The Finney Company
3166 S River Road
Suite 15
Des Plaines, IL 60018
877-434-6639 (p)
847-391-1105 (f)
www.callfinneyfirst.com

Gerry White Pin Co
4024 Keats Drive
Sarasota, FL 34241
941-342-6060 (p)
941-377-5041 (f)
www.gerrywhitepinco.com

Perry's Creative
Promotions
PO Box 20610
Castro Valley, CA 94546
800-774-6847 (p)
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