The Rotary Foundation Zone Team Training Guide 2008-2009

A training resource for:

- Regional Rotary Foundation Coordinators
- Major Gifts Advisers
- Annual Programs Fund Strategic Advisers
- Rotary Foundation Alumni Coordinators

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Introduction

About this Training Guide

The goal of this training guide is to help zone team volunteers plan and prepare for their role in the 2008-09 Rotary Year.

Following the 2007-08 zone team training, we conducted a survey to find out how effective and useful these training materials are for you in the field, and how well you felt prepared for the task ahead. The feedback from your responses was used to revise our materials for this year's training.

This guide is broken down by the primary areas of Foundation fund development work: Annual Giving, major gifts, Planned Giving, Permanent Fund and effectively working with Rotary Foundation alumni. Each section concludes with a set of Action Steps and Strategic Questions to be reviewed during your zone team training. Working through these strategic planning questions should help you and your team in developing a plan that helps to address the needs of the districts in your zone.

This guide also includes a resource CD-ROM, which contains electronic copies of Foundation brochures, reports, presentations and other club and district training materials.

Foundation Mission and Goals

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill and peace through the improvement of health, the support of education and the alleviation of poverty.

A Message from the Trustee Chair

Dear members of the family of Rotary,

We have chosen five goals to direct our efforts in 2008-09:

- Keep our promise to eradicate polio.
- Embrace the two pillars of support for The Rotary Foundation: the Annual Programs Fund through Every Rotarian, Every Year and the Permanent Fund.
- Participate in Your Foundation/Our Foundation, a "lend a hand" program for sharing funds from club and district foundations to permanently establish the Rotary World Peace Fellows program and support global polio eradication.
- Enhance Rotary's public image.
- Support the Future Vision Plan of The Rotary Foundation.

Thank you in advance for your generous and lasting support for The Rotary Foundation, bearing in mind that working together, we can Make Dreams Real.

Jonathan B. Majiyagbe
Rotary Club of Kano, Kano State, Nigeria
Trustee Chair, The Rotary Foundation, 2008-09

Training Agenda

Objectives

- Review progress of group and establish zone goals for the coming year.
- Develop a pro-active, goal-oriented approach to your position. To review current priorities of TRF and establishing goals for 2008-09 Rotary year to include: EREY, Bequest commitments, major gifts, Rotary Centers, etc.
- Develop strategies for securing ongoing support for the Foundation.
- Share successful strategies in various areas of fund development.

Introduction (30 min)
Greetings and Introductions
About the training manual

Session 1: Discuss objectives, roles and responsibilities (45 min)
Led by various team members

- Volunteer Roles: Monthly & Quarterly expectations
- Overview and updates

Session 2: Team Building (45 min)
Led by RRFC

- The Team Concept – serving effectively in your role
- Communication
- Training & engaging subcommittee chairs
- Collaborating with the Rotary Foundation Alumni Coordinators (RFACs)
- Collaborating with Senior Leaders

Session 3: Resources available to MGAs, SAs & RFACs (30 min)
Led by SA/MGA

- Using reports to track activity and performance
- Staff/PowerPoints/publications/www.rotary.org

Session 4: EREY – Focusing on Key Initiatives & Strategies (1 hour)
Led by SA

- Goal Setting
- Paul Harris Society/recurring giving
- Working with large and non-giving clubs

Session 5: Developing Major Gifts (1 hour)
Led by MGA

- The Four Key Steps
- Gift Types
- Rotary Centers

Session 6: Organizing for Major Gifts (1 hour)
Led by MGA

- Getting a System in Place
- Solicitation Exercise
- Creating Action/Results (Open Forum Discussion)

Session 7: Alumni Relations (30 min)
Led by RFAC

- Using Alumni to promote fundraising
- Effectively working with the RFAC and Alumni Chairs

Key Discussion Points

Working as a Team

- What training, planning, organizing needs to be done prior to 1 July?
- How can we keep in better communication with our MGA/SA/RFAC partners? How do we build strong relationships and trust with another district's leadership?
- What tools do we have to make the job of the DG, DGE, district Rotary Foundation chair, club president and club Foundation chair easier?
- How can we help DGs & club presidents develop a personal mission tied into their successful leadership?
- How do we create in club and district leadership a vested interest in The Rotary Foundation?
- In order for TRF to achieve its Annual Programs Fund goal for the year and to grow in future years, what messages and structures need to be in place?
- How do we better manage our time and travel?
- Who are staff resources in Fund Development? What are other resources?

Annual Programs Fund

- What strategies did you and your districts pursue in achieving growth in Annual Programs Fund giving in the previous Rotary Year?
- How did you monitor the club and district fund development goals established for 2007-08? How can we build on that for monitoring goals?
- Have your districts had success in motivating leadership contributions in July, at the beginning of the Rotary year? What resources were the most useful in promoting EREY this year? DVD, RVM, PowerPoints, training manuals, club success kits, club giving information, etc.?
- How do we change the mind-set of a non-giving club? Who is or who are the key members in the club that can help change this culture?
- How do we encourage repeat gifts to APF (e.g. TRF-DIRECT, quarterly dues, Paul Harris Society)?

Major and Planned Gifts

- What role do major gifts play in each position?
- How do we reach the clubs with the "Two Needs, Two Ways of Giving" message?
- How do we encourage Rotary Foundation Sustaining Members and Paul Harris Fellows to become Benefactors or Bequest Society members?
- How can we put in place a system to actively manage the cultivation and solicitation of major gifts?
- Are clubs, districts, and zones providing time in meetings and events to express appropriate appreciation to Paul Harris Fellows, PHS members, Major Donors, Benefactors, Bequest Society Members, Rotary Foundation Sustaining Member clubs, 100% PHF clubs, and EREY Clubs?
- How can we assist in identifying endowment gifts (Permanent Fund) to support the Rotary Centers?
- How can Appreciation Events encourage further giving?

Alumni Relations

- How can we leverage RFACs in promoting support of the Foundation?
- How do we effectively integrate the alumni chair into our team?
- How can we use our alumni connections to bring relevant speakers to clubs and districts?

Position Descriptions and Calendars

Regional Rotary Foundation Coordinator Role and Responsibilities

Regional Rotary Foundation coordinators serve as a key volunteer resource on all general Foundation matters, program and financial, and serve as a vital link between Rotarians and the Secretariat. In general, each regional Rotary Foundation coordinator shall be concerned with the promotion of The Rotary Foundation and its various programs, shall actively work in support of Rotary goals, and shall be responsive to requests by the Trustees and the general secretary. The Trustees recognize the importance of coordinated and consistent efforts in providing the most effective training possible to all Rotarians.

(April 2000 Trustees Mtg., Dec. 126)

Responsibilities include:

- Lead by example by making an APF/SHARE contribution every year.
- Plan, promote and conduct a Regional Rotary Foundation Seminar annually.
- Assist district governors and their Foundation committees to plan district or multidistrict Rotary Foundation seminars.
- Train existing district leadership to inform club membership on the Foundation's programs and fund-raising.
- Conduct, when invited to do so, special sessions on the Foundation at Rotary Institutes.
- Effectively communicate and actively promote the work of The Rotary Foundation to Rotarians and non-Rotarians around the world.
- Assist the Trustees and the general secretary in explaining Foundation programs and the need for funding to district and club leaders.
- Support district governors-elect in establishing their district Foundation goals for program participation and financial support, as well as helping to prepare for their year of service.
- Promote the importance of stewardship, oversight and reporting in the use of Rotary Foundation funds to governors, district Rotary Foundation committee chairs, and district subcommittee chairs.
- Actively support district leaders to achieve their program goals by conducting information training sessions on Foundation programs, and monitoring progress toward goals throughout the year.
- Actively support district leaders to achieve their fund-raising goals, both Annual and Permanent Fund, by conducting informational training sessions and monitoring the progress toward goals throughout the year.
- Work in coordination with the Major Gifts advisers to accomplish the goals of the Permanent Fund Initiative.
- Provide assistance, guidance and support to district governors, governors-elect, assistant governors and district Foundation committees.
- Serve as a Foundation information resource for Rotary leaders at the district and club levels.
- Conduct zone-level training for governors-elect on the Trustee-recommended Foundation subjects at sessions held in conjunction with Rotary Institutes, when invited by the appropriate authority.
- Complete reports as necessary and forward them to World Headquarters in a timely manner.

(April 2005 Trustees Mtg., Dec. 109)

Source: November 1996 Trustees Mtg., Dec. 12; May 1997 Trustees Mtg., Dec. 181
Amended: October 1999 Trustees Mtg., Decs. 24 and 26
Amended: April 2005 Trustees Mtg., Dec. 109

Regional Rotary Foundation Coordinator Calendar

Date	Action	Notes/Objectives
Ongoing	Communicate information regarding trustee decisions with districts.	Be sure that important Trustee decisions impacting the future of our organization are shared at the district and club level.
	Send frequent reminders to districts about program application deadlines.	Districts want to get a quick start to ensure there is adequate time to beat a deadline.
	Communicate with districts on progress toward contribution goal.	Help districts track fundraising activity and initiatives such as the PHS, automated giving, large club participation, non-giving clubs etc.
	Host bi-monthly conference call with Zone team: Strategic Advisers, Major Gifts Advisers and the RFACs.	Use this opportunity to build team, organize zone & district events, discuss concerns, assign responsibilities, motivate team.
Quarterly	Quarterly Activity Reports due.	Trustees stay informed about your activities and learn about district initiatives.
January	Begin discussing the Fund Development Club Goal Form with incoming DGEs and PEs.	With support from your zone team, ensure your districts are prepared to have goals set and submitted to TRF either during PETS or no later than 15 May.
February	Attend RRFC Training Institute.	This is a mandatory training that provides RRFCs the latest information on Fund Development and Programs. RRFCs have the opportunity to connect with their peers throughout the world.
March	Send introductory postcard to each district governor-elect and incoming DRFCC.	This is an opportunity to open lines of communication with DGEs and DRFCCs.
April	Begin planning for zone Rotary Foundation Seminars by finalizing dates and locations.	The key to high turnout is plenty of advance notice and active promotion of the event.
Immediately following PETS (March-May)	Ensure completion of Fund Development Club Goal Forms.	Stay in regular communication with district teams. Annual Giving staff will assist you in monitoring club submissions.
	Ensure districts are aware of and understand the Foundation Goals, including Programs.	Program staff can assist.

April - July	Train Zone Team.	
	Zone level training of district team and Rotary Foundation committee chairs.	Ensure districts are educated on the programs of TRF, how to promote the programs of TRF, and aware of processes and procedures.
July	Contact districts of responsibility - “How can I help you as an RRFC?”	Motivational kick off to new Rotary year.
	Finalize dates for district Rotary Foundation seminars.	The Trustees encourage all districts to hold a district Rotary Foundation seminar as early in the Rotary year as possible, but no later than 15 November.
	Send out congratulatory letters for achieving Foundation goals.	
July - September	Plan for governors-elect training seminar (GETS) and regional Rotary Foundation seminars at Rotary zone institute.	This is a great time to raise the profile of your support team: the Major Gifts Advisers, Strategic Advisers and Alumni Coordinators.
	Promote leadership gifts from district and club leaders.	Help districts and clubs get off to a fast start in their fundraising by having leadership teams make their EREY gifts at the start of the year.
September	Announce appointment of incoming RRFCs.	Share the good news and help prepare for smooth transition of leadership.
No later than mid-September	Encourage districts to plan for Rotary Foundation month; offer suggestions for special activities/speakers.	
September - December	Serve as training team members at GETS and Rotary Institute.	
	Hold Regional Rotary Foundation seminars at Rotary Institutes.	
	Provide DRFC Chair status.	Make sure DRFC Chairs are appointed based on Trustee guidelines.
October - November	Begin actively promoting year-end gifts.	While many major donors make their gifts in December, they often begin their gift planning now.

Major Gifts Adviser
Role and Responsibilities

The Major Gifts adviser is responsible for promoting and supporting the solicitation of major gifts to The Rotary Foundation in assigned territories. Major gifts, however, are also routinely made to the Annual Programs Fund and other causes, like PolioPlus. Major gifts are an integral component of a successful fund development effort.

The Major Gifts adviser reports to a Regional Rotary Foundation coordinator (RRFC) and provides a communication link between Annual Programs Fund strategic advisers, district leadership (district governors, district governors-elect, assistant governors, district Rotary Foundation committee chairs, annual giving subcommittee chairs, and Planned and Major Gifts subcommittee chairs), and Rotary Foundation staff for purposes of major gift fundraising.

The term of appointment for each Major Gifts adviser shall be three years, subject to an annual performance review.

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

- Lead by example through a major gift, Bequest Society commitment, and/or Benefactor commitment to the Foundation, according to his or her own financial capacity.
- Assist RRFCs in promoting major gifts, Bequest Society and Benefactor commitments at Rotary Institutes, President-Elect Training Seminars, Foundation Seminars, and other Rotary events as requested.
- Train and work closely with district leadership on an ongoing basis to support their major gifts, Bequest Society and Benefactor promotion.
  - Promote the *Two Needs, Two Ways of Giving* message at club, district and zone meetings.
  - Assist clubs and districts in setting enhanced fund development goals, submitting these goals to the Foundation, and providing strategies for goal achievement.
  - Encourage clubs and districts to develop and maintain strong fundraising committees to establish and exceed goals.
  - Seek at least one major gift to the Annual Programs Fund per district in conjunction with district leadership and the Annual Programs Fund Strategic adviser.
  - Encourage districts to identify, cultivate, and solicit at least twelve major gift prospects every year.
  - Plan cultivation and stewardship events for important Foundation supporters.
- Personally identify, cultivate and solicit major gifts, with an emphasis on gifts of US$25,000 or more.
- Monitor monthly fundraising progress in assigned territories and provide support and strategies to clubs and districts in meeting or exceeding established goals.
- Provide regular progress reports to RRFCs and Foundation staff as requested. *(June 2005 Trustees Mtg., Dec. 138)*

Source: October 1994 Trustees Mtg., Dec. 27
Amended: June 1995 Trustees Mtg., Dec. 214; April 2005 Trustees Mtg., Dec. 105

Major Gifts Adviser Calendar

Date	Action	Notes/Objectives
Ongoing	Identify, cultivate, and solicit prospective donors for major gifts in support of TRFs humanitarian and educational programs.	The primary objective is to secure major gifts, generally targeting individuals with the capacity to make a $25,000+ contribution.
	Participate in bi-monthly Zone conference call, hosted by Annual Giving Officer (North America only).	This call helps build the zone team and is instrumental to having a successful year.
March	Participation in PETS and District Assemblies. Send introductory e-mails or call the District Governors, District Foundation Chairs, and District Major Gifts Chair/District Permanent Fund Chair.	Relationship building, educating District leadership and Rotarians about major gift opportunities.
April	One-on-one meetings with DGEs, incoming DRFCCs and DPFCs.	Establish mentoring relationship. Share ways to help identify potential major gift prospects. Offer to speak at clubs in district in the new Rotary year.
March-May	Work with Club and District Leadership to discuss the identification of major gift prospects.	Active management and coaching will be required with many district leaders.
May-June	Set dates for district Foundation seminars and talk with district leadership about creative ways to plant seed for leadership gifts to TRF. Get contact info from DGE or district Foundation Chair for entire district's Foundation committee.	Share techniques to encourage attendance. Help ensure quality of speakers, presentations, etc. Carve out sufficient time for a section on planned and major gifts.
July	Personally become a Benefactor, Bequest Society member, or Major Donor if commitment not already made. Provide RRFC with a list of 20 possible prospects for major gifts.	The most effective fundraising is generally between peers who have made commitments to the organization. Identifying the best 20 major gift prospects is a key component in the success of major gift efforts.
August	Hold cultivation meetings with 4 of the 20 major gift prospects. Work with RRFCs to assist, plan, and participate in regional Foundation training	Face-to-face meetings with major gift prospects is key to establishing trust and a building a relationship for a future solicitation.

	seminars. Establish relationships with entire district leadership and middle management team.	
September	Hold cultivation meetings with 4 more of the 20 major gift prospects. Contact district foundation chairs to assist with district seminars.	Prepare a significant major gift component in the seminars. Include planned and major gift materials from the Rotary Foundation.
October	Hold cultivation meetings with 4 more of the 20 major gift prospects.	On average, it takes five solicitations to secure a major gift.
November	Hold a major gift prospect cultivation event, to train on gift option & tax benefits and/or recognize existing Major Donors. Additionally, hold cultivation meetings with 4 more of the 20 major gift prospects.	A cultivation event can consist of a fireside chat, a small reception in conjunction with a district event, a dinner or an estate planning seminar.
December	Hold cultivation meetings with 4 more of the 20 major gift prospects.	Concentrate on the first two weeks of the month to avoid conflicts with holiday plans.
January	Hold 6 follow-up cultivation meetings with major gift prospects.	Be prepared with any additional information that the prospects may have requested during your initial cultivation meeting.
February	Hold 6 follow-up cultivation meetings with major gift prospects.	Focus on the program area(s) of interest to the prospect.
March	Hold 6 follow-up cultivation meetings with major gift prospects.	The meetings will help you determine the solicitation amount and program to be supported.
April	Personally ask for 3 major gifts from among 20 major gift prospects. Participate in PETS and District Assemblies.	Make the “Ask” with conviction and confidence. Be prepared for response, including objections and follow up activity.
May	Personally ask for 3 major gifts from among 20 major gifts prospects.	Foundation staff (for North America: Major Gifts Officers) are available to assist with the solicitation, including formal solicitation and planned giving illustrations.

Annual Programs Fund Strategic Adviser Role and Responsibilities

A team of Annual Programs Fund strategic advisers has been established to provide the additional leadership and skills necessary to steward fundraising activities and Annual Programs Fund training at the district and club level toward the achievement of the Trustees' annual giving goal.

Source: October 2000 Trustees Mtg., Dec. 23

The Rotary Foundation Annual Programs Fund strategic advisers (APFSA) provide a link between Regional Rotary Foundation coordinators, Rotary Foundation staff, and district leadership (District Governors, District Governors-elect, Assistant District Governors, District Rotary Foundation Chairs, Annual Giving Subcommittee Chairs) within their designated territories with the purpose of promoting the annual giving *Every Rotarian, Every Year* message and assisting clubs and districts in setting and achieving their Annual Programs Fund goals. Annual Programs Fund strategic advisers are appointed by the Trustee Chair for a one-year term, renewable up to a maximum of three years. There shall be at least one Annual Programs Fund strategic adviser appointed for every eight to ten districts.

Under the leadership of the RRFC, the APFSA shall:

- Lead by example and contribute US$100 or more each year to the Annual Programs Fund.
- Promote the *Every Rotarian, Every Year,* Annual Programs Fund message at Rotary Institutes, PETS, Foundation Seminars, District Conferences, District Assemblies, and other Rotary trainings and events as requested.
- Monitor monthly fundraising progress in assigned territories and provide support and strategies to clubs and districts in overcoming obstacles to goal achievement.
- Work with district leadership on an ongoing basis to:
  - Promote the annual giving *Every Rotarian, Every Year* message at club and district meetings toward the worldwide Annual Programs Fund Goal.
  - Assist clubs and districts in setting appropriate Annual Programs Fund goals, submitting those goals to Foundation staff, and provide strategies toward goal achievement.
  - Assist clubs and districts to develop and maintain strong fundraising committees to establish and meet goals.
  - Seek a minimum of one major donor Challenge Gift per district;
  - Create awareness about the Rotary Foundation Sustaining Member and TRF-DIRECT Donations programs (US and Canada only).
  - Ensure that there are zero non-contributing clubs in the district.
  - Encourage 100% participation by all clubs in Foundation programs.
- Work in tandem with the Major Gifts Adviser to cultivate and solicit major donors for major gifts for the Annual Programs Fund.
- Provide regular progress reports to RRFCs and Foundation staff as requested.

Annual Programs Fund Strategic Adviser Calendar

Date	Action	Notes/Objectives
Ongoing	Become knowledgeable about all aspects of The Rotary Foundation and its programs.	To be a valuable resource to Rotarians in your districts, you'll need to be able to convey each of the Foundation's programs and procedures.
	Proactively monitor district and club activity by initiating and maintaining regular contact with club and district leadership.	Do not wait to receive summary reports, you'll lose valuable time.
	Always show appreciation for the efforts of Rotarians in your respective districts.	
	Arrange for at least 24 club-speaking engagements each year, which include visits with large club boards (coordinated with RRFC & DG).	DGs and district leadership team need to know they're a critical part of the zone team, their involvement is an asset to the zone, and that they always have support.
	Regularly communicate messages on TRF fundraising ideas, motivating stories, deadlines and performance figures to district leadership (1-2 e-mails and calls monthly).	It's nice to be reminded of how important your work as a volunteer is.
	Support MGA efforts for developing major gifts and work with district leadership to identify major gifts to the Annual Programs Fund.	Optimize district visits with major donor prospect meetings.
	Participate in bi-monthly Zone conference call, hosted by Annual Giving Officer (North America only).	This call helps build the zone team and is instrumental to having a successful year.
February	Make all of your introductory calls to district leadership following the International Assembly.	Use the time for relationship-building, educating DGs that goal forms are critical management tool and can help identify future district leadership.
	Maximize club visits and attend district events.	Keep the good works of The Rotary Foundation in front of members.
March	Participate in PETS.	Use this time to relationship-build with incoming club presidents and to collect their goal forms at PETS. Encourage the establishment

		of or increase of membership in PHS to help districts exceed previous year's fundraising efforts. Be sure to have a current APF progress report with you.
April	Hold one-on-one meetings with DGEs.	Establish mentoring relationship: help them prioritize, avoid pitfalls, learn time management techniques. Introduce Coach's Playbook. Offer to speak at 2-3 clubs in district after 1 July to kick off TRF fundraising effort.
March - May	Follow-up on submission of goal forms bi-weekly.	Many DGs will mistakenly believe they'll only need to ask for the goal forms just once or twice! Not true! These should be collected prior to the convention in order for the trustees to announce their goal for the next Rotary year.
May - June	Set dates for district Foundation seminars and talk with district leadership about creative ways to attract new participants.	Help DGs set goals such as having two members from each club attend Foundation seminar. Monitor progress with follow-up phone calls.
	Plant seed for leadership gifts to TRF.	Encourage them to give personally and, in turn, to ask each president to lead their club with a gift to TRF.
	Get contact info from DGE or district Foundation Chair for entire districts Foundation committee.	Know who is on the team and how to best communicate with them.
June	Be sure DGs know how to access reports on-line.	
July	Ensure EREY middle management team is in place. Make personal gift to the Annual Programs Fund/join Bequest Society. Contact district foundation chairs to assist with district seminars.	Identify the districts that lack organizational structure. If possible, sit in on DG club visit presentations to offer additional feedback and coaching.
August	Work with RRFCs to assist, plan and participate in regional Foundation training seminars.	Establish relationships with entire district leadership and middle management team.
	Contact DGs and DRFCs about a possible district/area TRF event in November.	This is a good opportunity to award PHFs and further inspire a large group.
August - October	Participate in GETS training at Rotary Institutes. Provide	Help build a sense of team in zones.

	DGEs with practical tips on club goal-setting, middle management team, etc.	
September	Review planning for district seminars. Re-emphasize *Coach's Playbook* as a training tool.	Share techniques to encourage attendance. Help ensure high-quality speakers, presentations, etc.
November	Quarterly review and assessment with DGs regarding first three months: Identify strengths and weaknesses and provide support and guidance where needed. Plant seed for a PHS event in February - Rotary's birthday.	Recognize early trends and potential areas of concern. Did every club president lead with a gift? Are there many non-giving clubs? Has contact been made with the boards of large clubs, etc?
December	Remind districts of performance results year-to-date. Encourage year-end giving and be sure they know how to send in contributions.	Many club treasurers still do not know where to send contributions!
January	Once December's final numbers are in, hold meeting with DG and district leadership team for a six-month review of district activity. Begin talking with DGEs about club goals forms and pre-PETS.	Encourage DGEs to hold pre-PETS to educate club presidents on the importance of goal setting. Goal forms can be collected at PETS.

Rotary Foundation Alumni Coordinator Role and Responsibilities

The overall goal for the Rotary Foundation alumni coordinators is to ensure that Rotary clubs and districts make Foundation alumni integral to Rotary; to urge clubs to consider alumni as potential Rotary club members and as potential contributors to The Rotary Foundation; and to use alumni as effective advocates for the programs of The Rotary Foundation.

Responsibilities include:

- Support and encourage district alumni subcommittees to develop a strategic plan for improving alumni activities in the district and work with the subcommittees to ensure the plan is being implemented.
- Support and encourage district alumni subcommittees to work in cooperation with The Rotary Foundation Alumni Relations Section to maintain an accurate and complete current list of all alumni within the district and to use it locally in appropriate ways.
- Create and distribute a newsletter to the district alumni subcommittees.
- Help organize district and multidistrict orientation seminars for Ambassadorial Scholars (including host or sponsor counselors), or Group Study Exchange team members and encourage the use of alumni as mentors for new Foundation program participants.
- Encourage the district alumni subcommittee to work closely with the district Scholarships, GSE, Rotary Centers, Humanitarian Grants and Rotaract subcommittees as appropriate.
- Work with the regional Rotary Foundation coordinator and the zone leadership team on alumni and Rotary Foundation matters.
- Help districts organize specific alumni events such as, but not limited to, community, vocational and international service projects or social events to bring district alumni together; encourage alumni to participate.
- Assist in the creation of district or regional alumni associations, and
    - Encourage an annual meeting of a district alumni association, preferably during the district conference.
    - Integrate alumni association activities with local Rotary activity.
    - Encourage the use of the Internet and/or other electronic communications to facilitate alumni activities.
- Promote and encourage appropriate alumni for Rotaract or Rotary club membership by working with district alumni subcommittees, Rotaract subcommittees and the regional RI membership coordinator.
- Encourage alumni to contribute financially to The Rotary Foundation by working with district alumni subcommittees, Annual Programs Fund strategic advisers and Major Gifts advisers.
- Promote and encourage districts to maintain a speakers' bureau and to identify distinguished alumni to enable districts to invite alumni as speakers for district/club events, especially November, Foundation month.
- Help coordinate alumni activities at regional and international meetings.
- Encourage alumni and district alumni subcommittee chairmen to submit articles for publication in newspapers and/or other media outlets both for the general public and within Rotary.
- Give presentations on Foundation alumni to zone Foundation seminars, district or club Foundation seminars, fundraising or other TRF events.

Source: April 1999 Trustees Mtg., Dec. 144
Amended by October 2005 Trustees Mtg., Dec. 58

Rotary Foundation Alumni Coordinator Calendar

Date	Action	Notes/Objectives
Ongoing	Ensure that Rotary Clubs and Districts make Foundation alumni integral to Rotary. Urge clubs to consider alumni as potential members and as potential contributors to The Rotary Foundation, encourage the use of alumni as effective advocates for the programs of The Rotary Foundation.	Communicate with all alumni subcommittee chairs in your zone regularly, making sure that they are also in contact with their district's GSE, Scholarships, Rotary World Peace Fellows, and Membership Chairs. Help each district form an alumni association, concentrating on alumni from the past five years. Help each district involve alumni in planning an alumni event at district conferences. Ensure that all selection committees for Scholarships, GSE and Rotary World Peace Fellows involve appropriate alumni. Encourage all district alumni chairs to coordinate efforts with district membership chairs to ask clubs to extend an open invitation to alumni for membership in their local Rotary Club.
April		Rotary Magazine Month: Do your districts have outstanding alumni who could be written about in a Rotary publication? *(Note: a three-month lead-time is required for an inclusion of suggested articles in Rotary Magazine).*
May	Introduce yourself to incoming district alumni chairs and work with them to prepare for the upcoming year.	
June	Attend RI Convention and related alumni events.	Rotary Fellowship Month: Concentrate on promoting alumni fellowships with Rotarians. 4th Quarterly Report due 30 June.

July	Determine your personal goals for the year and communicate them to district alumni chairs.	Has your zone chartered any new alumni associations? If yes, plan activities for these associations. If there are no associations, work to find interested alumni to charter new ones.
August	Attend Rotary Institutes and help alumni chairs invite alumni to be involved and to present.	Membership and Extension Month: Suggest that alumni chairs share names of alumni who are good candidates for membership to their district membership chair.
September	Attend Rotary Institutes and help alumni chairs invite alumni to be involved and to present.	New Generations Month: Suggest that each district hold an event specifically for young alumni residing in their area. 1st Quarterly Report due 30 September.
October	Attend Rotary Institutes and help alumni chairs invite alumni to be involved and to present.	Volunteer Service Month: Remember that Volunteer Service Grant recipients are also Foundation alumni and can be invited to speak to clubs about their experience.
November	Attend Rotary Institutes and help alumni chairs invite alumni to be involved and to present.	Rotary Foundation Month: Make sure that alumni are involved with the selection of new program participants.
December	Attend Rotary Institutes and help alumni chairs invite alumni to be involved and to present.	Family Month: Remember that alumni are an important part of the Rotary family and keeping them connected is important to the growth of the organization. 2nd Quarterly Report due 31 December.
January		Rotary Awareness Month: Try to make the incoming district Foundation leaders aware of the importance of alumni and to implement the Foundation's suggested ideas and goals.
February		World Understanding Month: Emphasize world understanding by inviting alumni to speak at events about how their Rotary experiences improved their awareness of world understanding.

March	Participation in zone team training for the coming year (when applicable).	Rotary Literacy Month. Concentrate on team relationship building, educating, and sharing ideas. 3rd Quarterly Report due 30 March.
April	Participation in zone team training for the coming year (when applicable).	Rotary Magazine Month: Do your districts have outstanding alumni who could be written about in a Rotary publication? Has your zone chartered any new alumni associations? If yes, plan activities for these associations. If there are no associations, work to find interested alumni to charter new ones.
May	Participation in zone team training for the coming year (when applicable). Introduce yourself to incoming district alumni chairs and work with them to prepare for the upcoming year.	
June	Participation in zone team training for the coming year (when applicable). Attend RI Convention.	Rotary Fellowship Month: Concentrate on promoting alumni fellowships with Rotarians. 4th Quarterly Report due 30 June.

Every Rotarian, Every Year

Club Goal Setting

The Club Goal Form is an important fundraising tool to establish real and achievable goals for each club and, in turn, each district. Submitting meaningful club goals in a timely manner is crucial to overall district planning and fundraising efforts.

Goal setting is an easy and effective marketing tool that any club and district can use year after year, despite the annual leadership change. Relying exclusively on individual Foundation “cheerleaders” or a handful of individuals can lead to significant inconsistencies in club or district-wide Foundation support. An emphasis on the goal setting process instills simplicity and continuity that promotes The Rotary Foundation within a Rotary volunteer structure that is greatly impacted by annual leadership and personality changes.

In many Rotary Clubs the incoming president is not a long-time Rotarian. Often, that individual does not have a comprehensive understanding of the role and the overall work of our Rotary Foundation. Setting a club goal helps raise his or her awareness of our Rotary Foundation.

Getting those goals is an important structure to help you achieve solid TRF contributions, as shown by the following statistics for North American clubs:
Clubs that do not set a goal have a per capita contribution of $68. Clubs that do set a goal have a per capita contribution of $117, or 72% higher.
19% of clubs that do not set a goal end up being con-contributing clubs.
Only 4% of clubs that do set a goal end up being non-contributing clubs.

In 2006-07, clubs that set a goal had per capita giving of $117 – 72% higher than clubs that did not set a goal.

19% of clubs that did not set a goal ended up being non-contributing clubs at the end of that Rotary year.

There are several factors that lead to achieving 100% in club goals submitted:

- Provide extensive Foundation education in your district – present the form as a means to secure support for Foundation programs rather than just setting a number.
- Present the form and the concept of setting the goal to Presidents-elect prior to PETS (for example at pre-PETS, if your districts provide such a training opportunity). Collect the completed goal forms at PETS.
- Spend time encouraging clubs to not only give to the Foundation, but to get a return on what they give. In other words, apply for a Matching Grant, or a District Simplified Grant. Get an in-kind return by being involved with GSE hosting, sponsoring an Ambassadorial Scholar or World Peace Fellow. Foster Foundation understanding through program participation.
- Provide a year-at-a-glance calendar for every President-elect that includes the dates that the goal form is due.
- Use Assistant Governors to help both prepare Presidents-elect for the goal setting process as well as collect any outstanding forms.
- The suggested average amount per member internationally is US$100. Many districts have chosen to promote a double-sustainer minimum contribution of US$200. Promote a per capita amount that is an inspiring goal for your district.
- Look at a multi-year giving report for signs of how to stretch your goal.
- Contact your district leadership team to review a list of prior year goals and total contributions to help determine an appropriate stretch goal for each Rotary Club.
- Consider current Benefactors, Bequest Society members, PHF+7 awardees and Paul Harris Society members to determine a potential goal for major gift donors in your club.
- Establish a goal that is realistic, but also builds on your previous year total.

Sharing a more Effective Message

Packaging all aspects of the Rotary Foundation into a compelling presentation can be a challenging task. A segment of the Rotary membership struggles to understand how the Foundation operates and how it impacts our world community. Others understand the Foundation intellectually, but have not made a strong personal and emotional connection.

This section is dedicated to the task of telling the success stories of our Foundation in an emotionally compelling way that inspires Rotarians to act. Inspiring people to act does not just happen; it is planned and can be based on a set of proven methods.

Making Presentations more effective

Giving a presentation is a great opportunity. Everything the presenter says and does is driven by who is sitting in the audience. Determine the following:

- What is the purpose of this speech?
- What is the audience demographic? At Rotary, the level of experience within the organization and with our programs also comes into play.
- Size of the audience.
- Is attendance voluntary or mandatory?
- When and where will the speech be held? Is there time to view the set-up, test equipment in advance? Who coordinates on location?
- Length of time given to speak.
- How many other speakers are there? What are their topics? Can you connect with them prior to the event to ensure that you complement each other's presentations instead of repeating the same talking points?

Determine a focus for your presentation. As you write your speech, review how each step relates back to your overall message and most importantly how it might affect your audience. Imagine them saying to themselves: "So what? How does this affect me?" – Make them care.

The audience tends to remember beginnings and endings the most.

In your presentation, connect your beginning with your final thought. Start and finish strong.

Openings that work

- Real questions that require audience participation. *"How many have had the opportunity to travel to another country as part of a GSE team exchange, Matching Grant or Polio Immunization Campaign?"*
- Grabber statistics. *"I will be speaking with you for the next 30 minutes. During that time, about 570 children will die because of unsafe drinking water and lack of sanitation in their countries."*
- A twist. *"Last year, I told my family I was preparing to retire. What I did not prepare them for was that I am now on the road more than ever, traveling overseas more than ever – and it's all in the name of Rotary."*
- A story. All of you have great Rotary stories to share. At the start of your presentation, pick a Rotary story that can be told in about one minute to help set the stage and the mood for your presentation.

Share in your opening statement the main purpose of your presentation. Repeat the purpose and conclusion at the end. Listeners tend to remember beginnings and endings most. Make your opening and closing strong. You many not have to remember an entire presentation, but if you can remember the first four minutes without consulting your notes, you have a better chance of connecting with your audience, get calm and settled into the flow of your speech.

The middle of your presentation

The middle section should be about 90% of your talk, with opening and closing taking about 5% each of the overall time allotment. How you structure this part is up to you, but an effective approach can be to showcase a problem and then present a possible solution. In the case of Rotary it can be a presentation of a need in a community and how a Matching Grant helped address that need.

Listeners recall information best when ideas are presented in groups of three: "To me, *Every Rotarian Every Year* really means that:

- We can give every child the opportunity to read and write.
- We can give every community clean and safe drinking water.
- We can give everyone in the world a chance to live in peace."

A breakdown like this (Literacy, Water, Peace – again three items) is more memorable than a long list of options and talking points.

Present ideas in groups of three, such as "Literacy, Water, and Peace".

This concept of the "Magic Three" is a great tool to help with information recall and reinforces your ideas with the audience.

To break away from reading your script, use note cards that take you from talking point to talking point with trigger words or phrases. This may require some practicing, but it tends to lead the speaker to speak more naturally, and become more engaged with the audience.

Another benefit of using small note cards is the option to use color-coded cards. Start of with green cards for your initial remarks. Use yellow for the body of your presentation and red cards as you get closer to the end. The color coding can help you keep track of pacing and timing. The yellow cards are the various taking points during the middle of your presentation – if you have to cut content due to time constraints, start pulling yellow note cards from your presentation deck. Once you get to your first red card, you know you have about 5 minutes worth of content before you have to conclude your presentation.

Closing the presentation

Close by tying the end back to the beginning. The last thing you say should be the key message you want the audience to remember. Finish your talk strong.

Questions and Answers

- Never promise a Question and Answer session up front, or a set time or set number of questions. If you have to cut your session short or end your presentation early due to time constraints, you could alienate the audience and lose their goodwill you worked so hard to foster during your talk.
- Repeat questions so you can a) ensure you understand the question as it was intended, and b) allow the audience to hear it. Do not repeat negative questions.
- Answer briefly, and do not stray from the question that was asked.
- Contemplate likely questions and answers in advance of any public talk or panel discussion.

Use the word "You" as much as possible to help build your connection with the audience. "You" is preferable to using "All of you", because it addresses each member in the audience individually.

Tips for addressing difficult or hostile questions:

- Be prepared for tough questions, but also be prepared to think on your feet.
- One question per person will help you remain in control of your audience. Answer the question, and then move on to the next person.
- Don't anticipate what the question will be – listen to the entire question first. There might be elements in it that can help you diffuse the situation.
- Scan the room – if you sense that there is a lot of agreement with the person asking the question, address the entire audience with your response. If you feel that the person asking it is alone with their opinion, address just that individual.
- Insist that the questioner stay on the topic: *"Right now we are discussing ___. I want to hear all concerns first before moving on to a new subject."*
- Offer to address difficult questions individually after the presentation.
- If you anticipate a hostile environment, opt to have small meetings instead to minimize the impact one member could have on a larger crowd.

Presentations that spark Action

Often, the audience is already quite knowledgeable about the subject and cares about it, but chooses not to take action. The message must first convince Rotarians that taking action is a good thing. It needs to reinforce that the result will be important and of value and benefit to them.

To create a receptive environment, the speaker needs to take the audience through the following stages:

- Promote Understanding.
- Understanding leads to Acceptance.
- Acceptance leads to Action.

Great things can be accomplished when the *right* people at the *right time* are persuaded to *take an action that leads to measurable change for an important issue*.

Rotarians need to have basic knowledge of the Foundation before they become meaningful supporters. To create this basic level of knowledge it is important to share information in a way that helps the target audience.

- **Don't overwhelm them.** If people already have a high level of awareness of an issue, they don't appear to be motivated by more facts. Poorly used statistics can overwhelm. Dramatic language can also overwhelm them. Extreme phrasing and exaggerations can cause an audience to respond negatively. What gets and holds their attention are the most relevant facts, presented in an honest manner, so they can make informed decisions.
- **Show respect.** Suggest ideas rather than insist on certain solutions. Using this approach successfully requires offering the right information and asking the right questions, trusting the audience to come to the desired conclusions on their own. When giving information, give Rotarians the chance to learn more and provide them with ways to do so. Numerous print materials are available free of charge and the website holds additional information in all nine Rotary languages.
- **Share knowledge so people believe.** Audiences need to trust the information provided to them. To achieve this, a presenter needs to gain their trust. One way of making an effective case is an eyewitness account of a successful Rotary project, exchange or experience. Share your personal Rotary moment, but also use other potential eyewitness accounts. GSE team members, grant participants and Ambassadorial Scholars can tell compelling stories that establish trust in the program and in your message.
- **Share knowledge so people care.** People often know about and believe in a cause and yet still are not inspired to act. An audience needs to see their own values reflected in an issue before they act. Rotary Foundation materials, including PowerPoint presentations and brochures, are aimed at a very general audience. Part of the challenge of being a Rotary leader is to translate these general message points and emphasize elements so that they become meaningful to your local Rotarians.
- **Tie values to strong and empowering emotions.** When presenting, make a deliberate choice what kind of emotion your words should evoke. Anger? Hope? Enthusiasm? Emotions like these can become a powerful catalyst when it comes to asking someone to take action. Many people talk about appealing to the heart, but too often presentations are made covering mostly facts and very little emotion. Determine first what kind of emotion you want to appeal to and strategically work towards that emotional response with your presentation.

Many moving and inspiring presentations are missing out on the opportunity to get the audience to act.

First, you decided on a key message – now decide on what key action you would like each Rotarian in the audience to take.

- **Make it personally relevant.** People readily admit that they are drawn to causes that are personally relevant to them. When an issue has no personal relevance, there may not be existing personal feelings to tap into. Connect people to issues through their friends and peers. Hearing from other Rotarians about the impact of a Matching Grant in action or finding out about their participation in an immunization campaign can be very powerful. The closer the presenter is to the audience (a member of the same club, an Ambassadorial Scholar from their home town), the greater the impact.
- **Get Rotarians personally involved.** People gain great satisfaction from seeing tangible outcomes of their support. Not only does this ease skepticism about how donations are used, it also addresses the issue of personal relevance. Outline small steps that they can take that collectively will have a significant difference. The cumulative impact of small Annual Programs Fund contributions from thousands of Rotarians is immense: it changes communities and saves lives.
- **Give Rotarians a personal incentive to act.** Rewards and benefits that Rotarians look for can vary greatly. For some it is recognition in front of their peers: Paul Harris Fellow award, Major Donor award, and Distinguished Service award. For others it is helping a friend, serving a cause, or just feeling good about themselves. What is important is that the perceived benefit of taking action outweighs the perceived personal sacrifice.

Once the groundwork for understanding and acceptance is in place, the next step is to overcome real and perceived obstacles that keep Rotarians from taking action. Some reasons for not taking action could be:

- I do not have the time.
- I do not have hope that change or a successful outcome is possible.
- My actions won't really make a difference.
- What's in it for me?
- This isn't me.
- I'm already doing so much – others need to step up first.
- I cannot relate to the people involved with this project.
- I just cannot get motivated.

Effective campaigns offer a story the audience can believe in and see themselves taking part in.

People care and want to make a difference, but often are not told exactly how.

The challenge is to not only knowing when to ask, but also to think about what to ask for.

Figuring out how to move beyond these obstacles is the key to generating action. Most people will only act within their own comfort zone. They will do what feels good to them without putting themselves at any risk. The possibility of being judged or confronted by others can add to this perceived risk factor, as can the fear of failure. However, feeling that one is part of a like-minded group of people that is working towards a common goal can expand one's personal comfort zone.

It is often necessary to present a request so it stays within the audience's comfort zone and overall lifestyle. The audience must understand what will happen when it takes the action requested of them. The more the request fits within their comfort zone, the greater the chance for action. For them to reach beyond their comfort zone requires that the risks are worth the rewards.

Be cautious not to present the problem as too big or too difficult to solve. If it seems insurmountable or too great, the problem is dismissed. Focus instead on creating the hope that positive change is possible. Keep your message optimistic. Focus on what could be achieved if the audience took action: *"With your support, we can eradicate polio."* Do not focus on the negative that might occur if no action was taken: *"Unless we raise these funds, all our progress will be undone."* Let the audience be the hero, not the villain.

- **Ask for something your audience can actually do.** It is more likely that your request will be heard if it is something reasonable and easy to do. Requests that are simple, perceived as low-risk and viewed as having a great chance for success are the most likely to result in action.
- **Keep it simple.** Ask for just one action, not multiple actions. We often give too many choices hoping that the audience will select something for themselves. In most cases, if there are too many choices, the choice the audience makes is taking no action at all. The easier you can make it the better: using TRF-DIRECT (where applicable) or combining Annual Programs Fund giving with club dues means that taking no action from that point on means “doing the right thing” by default. On the other end of the spectrum, a very difficult task must be made by a very credible source. As the trust and the level of comfort with the person making the “Ask” grows, so can the “Ask”. Given the annual change in club and district leadership, this can pose some challenges. For that reason, a message like *Every Rotarian, Every Year* can be very successful. The message itself stays consistent, and the “Ask” is within the comfort zone of every Rotarian.
- **Show them a leader is doing it first.** Encourage club and district leaders to make their Annual Programs Fund contribution early in the year. Your audience needs to know that someone did what needed to be done, feels good about it, and was recognized for it. If you are working with a prospect for a large gift, it can help if the Rotarian making the “Ask” is already a Major Donor.
- **Present taking action or supporting the cause as the social norm.** Again, words like *Every Rotarian, Every Year* can help frame Annual Programs Fund support as the social norm for every Rotarian. Demonstrate actively the action you want your audience to take rather than just telling them why they should give. Asking Rotarians to join the Paul Harris Society is best done by an established Paul Harris Society member. Asking for Annual Programs Fund support is best done by a leader who has already made their annual contribution at the Sustaining Member level or higher.
- **Reinforce the action by recognizing active supporters.** Share what has been achieved through their contributions and their participation. Recognize donors. Positive reinforcement reminds Rotarians that they can do something about the things they care about. Done well, this can lead to their increased support in the future. Celebrate successes – both big and small. Small successes can be the building blocks to greater successes that solve bigger problems. Continue to make recognition personal by sending them a handwritten letter, making a phone call or sending an email to create a sense of ownership in the overall success.
- **Have fun.** It is alright to have fun while *Doing Good in the World*. The fellowship of Rotarians should play a big part in your fundraising and humanitarian efforts.

When making presentations, remember:
- Numbers numb
- Jargon jars
- Stories get stored

It is also important to use the right timing for your message. Repeating the same need all the time can cause an audience to think that it is not that serious. They stop paying attention. Approaching the message with an ebb and flow can help keep your Rotarians engaged.

In the case of Rotary, there are natural opportunities for certain message points. At the beginning of the year report on prior year accomplishments and thank our supporters. During Foundation month (in time for holiday and calendar year-end giving) the “Ask” for support can be stronger. In early spring and during PETS the opportunity to provide interim updates and other motivational messages is a natural fit. After March, the “big push” toward our annual goal becomes the main focus. Recognition and acknowledgement is relevant and important throughout.

Working with PowerPoint

According to an article published in the Wall Street Journal in 2006, there are an estimated 30 million PowerPoint presentations given each day around the world!

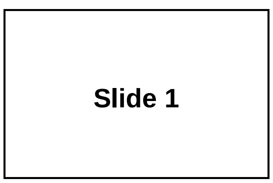
And most of them are done poorly.

The "point" of using PowerPoint is often missed. Many presenters use the program because it makes it easy to put together a presentation. They focus on themselves first rather than the audience. Why are your fellow Rotarians in the audience; what do they need to know; what do they need to do as a result of your presentation? Answer these questions first and create an outline for your presentation before creating even your first slide.

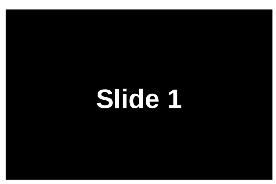
Why use PowerPoint at all? Combining visual learning with auditory learning leads to greater information retention than talking alone (about 80% retention rate compared to less than 40% retention rate for auditory learning alone). However, as the presenter *you* are the star of the show – not your slides. Use slides sparingly to help illustrate the point, but don't draw attention away from you and to your projected talking points.

Design Tips

In print, black lettering on white is easy to read and to retain. In PowerPoint presentations, the opposite is true. Because slides are illuminated, the white lettering will stand out. Visually, the light areas will appear to be in the foreground. Dark lettering on white or light background is harder to read as the audience has to "read around" the bright areas, which can be tiring on the eyes.



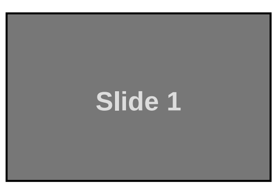
Slide: Black on white



Slide: White on black

Use a great deal of contrast in your slides. White on black, dark blue or dark green is best to read. Often PowerPoint presentations are made in rooms with lots of ambient light. Light coming through the windows or light from overhead sources will wash out your slides. Any additional bit of contrast will help.

High-contrast slide



Same slide as seen with an abundance of ambient light

Certain colors that typically show great in print can be challenging when used as a projected slide. The color red especially has a tendency to appear darker on screen, which can be counterproductive when using red to highlight important information. Instead, use italics or underline key points in your text.

Small variations in color (yellow and white) often appear very striking on your desktop screen, but blend when the presentation is projected. The impact you have tried to achieve is lost.

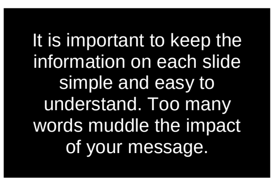
Keep your slides simple: a picture, a simple graph or a few words can help bring your presentation to life and add value to what you have to say. Slides that have too much written content will force to audience to start reading – and paying less attention to you. When you write bullet points, keep them short. Avoid "bullet paragraphs". Avoid having too much text in small lettering.

Assigning specific font sizes as "ideal" slide letting sizes is tricky. In the end it all depends how large your screen is projected and how far away the last person in the audience is seated. Inquire about the meeting space in advance so you can make adjustments accordingly.

- 1" letter is readable from 10 ft. (3 cm from 3 meters)
- 2" letter from 20 ft. (6 cm from 6 meters)
- 3" letter from 30 ft. (approximately 10 cm from 10 meters)

As a general rule, keep the font size on your slides between 26 pt. and 48 pt. You can never go too large, only too small. Footers are generally quite small; consider leaving the footer off altogether. Have only one topic or thought per slide. Use non-serif fonts such as **Arial** over serif fonts such as **Times**. Do not sacrifice readability for style.

Use slides to highlight data and numbers which can be difficult to present in words only. You can stick to "the story behind the numbers" during the talk.



Too much text per slide

Narrow the focus of your message

Better still

A word about advanced software features
Animations and embedded multimedia can be very powerful tools when used sparingly and in the right context. However, special features like animations, transparencies and video are not compatible with all platforms, all hardware and all versions of software.

If you cannot control what set-up will be in place for your presentation, keep things simple or allow for enough time on location to make changes and adjustments if necessary. Always have a second option – possibly a low-tech version of your presentation – available.

Ask yourself: if the equipment broke down during my presentation, could I still deliver my message effectively? If you cannot, what can you do during your preparation to be ready?

Telling a better story

The purpose of storytelling is to entertain, to present knowledge, to influence action. A personal, heartfelt account can bring the impact of a Rotary Foundation program to life better than any brochure.

Keep your story short, and keep the details focused on the overall theme of your presentation. The story should illuminate in some way what you are trying to get across to your audience. It should fit the mood of your presentation and direct or reinforce the emotional response you are trying to invoke in your audience.

Analyze your story
The experience may be vivid in your mind, but you may not have a way to share it to its fullest potential. Write out your story so you can practice the delivery.

Figure out their important traits in order to be true to them in your presentation. Determine the emotions of the characters in your story (you, the people you met and who impacted you). Determine the predominant mood of the story, the feeling you want to leave with your listeners when you have finished. The success of your story depends less on what you say, but how it makes your audience think and feel.

Rehearse your story
A story can illuminate an aspect of your presentation, it can be your entire presentation (if you have just a minute or two to have an impact, and an iteration of facts will miss the emotional mark), or it can be your lead into the main presentation.

If the latter is the case, this short story becomes your perfect opportunity to present without notes at the very beginning of your presentation. This establishes a connection of trust and authenticity and an emotional bond with the audience.

Practice your Rotary story. You want to make an emotional impact on your audience but not get so emotional when retelling your story that the audience starts to focus on your emotional state. You want the audience experiencing the emotional connection themselves without distraction.

- What you *don't* want is: "*He started crying* telling us that story."
- What you want is: "Listening to him tell that story *made me cry*."

Consider video or audio-taping yourself during your practice sessions. This can be an uncomfortable experience for many, but one that will make you a more effective presenter. Identify your strengths in your personal style and delivery. Focus on those strengths and build your story and presentation around those strengths rather than focusing on the elements you do not like. Having a coach or trusted friend to be your test audience can be very helpful.

Final thoughts on story telling

Consider presenter training a potential training opportunity at PETS and GETS to help others become more effective at promoting Rotary Foundation programs and Rotary Foundation giving.

Work closely with your Rotary Foundation alumni coordinatorat the Zone level and Alumni Chairs at the district level to have an active contact list of alumni in place that are willing and ready to give presentations at club and district events. Our alumni have great stories to tell and can make a very effective case for the support of our Rotary Foundation.

Unrestricted and Restricted Giving

There are three primary giving opportunities to the Rotary Foundation;

- Annual unrestricted (*Every Rotarian, Every Year*), or APF/SHARE
- Annual restricted (PolioPlus, Matching Grants, etc.)
- Permanent Fund

The first two earn Paul Harris Fellow credit. Gifts to the Permanent Fund do not, although they may qualify the donor for Benefactor or Bequest Society status.

The intent of annual restricted and annual unrestricted gifts is to spend the entire gift amount within a short period of time. Annual restricted gifts are typically spent within the current Rotary year, annual unrestricted gifts (also referred to as our Annual Programs Fund or *Every Rotarian, Every Year*) are invested for three years and then spent in full. Contributions to the Permanent Fund are invested with earned interest being spent, but the principal amount never getting touched. This principal of our Permanent Fund is also called the endowment of our Rotary Foundation. Interest earned from the endowment supports specific programs and DDF for specific districts and the World Fund.

A restricted gift can only be used for a specific purpose (it is literally “restricted” to polio, a Matching Grant; anything that is specified by the donor and thus it cannot be used for any other purpose). Restricted gifts fund our programs just like unrestricted gifts do, but there are three main downsides:

- Restricted gifts used for a Matching Grant are only matched 50 cents for every dollar from the World Fund.
- Funding Matching Grants with restricted contributions can cause an administrative delay in the grant approval process of up to eight weeks (waiting for the funds to come in, needed crediting of contributions and recognition to individual members, currency conversion issues, etc.).
- Restricted gifts are costly to process for the Foundation.

Restricted funds are processed at a loss to the Foundation. They need to be administered, recognized and accounted for in the same way as unrestricted gifts. Because no part of the gift amount can be reduced to help defray administrative costs, the Foundation actually takes a loss on any restricted gift that comes in. That loss is subsidized with earnings from unrestricted gifts.

Unrestricted annual gifts are invested by the Foundation for three years and then disbursed with 50% going to districts as District Designated Funds (DDF) and 50% going to the World Fund. During this three-year investment period, called the SHARE cycle, the invested amount earns enough interest to cover the operational expenses of the Rotary Foundation, and the entire contributed amount can go back to be used for programmatic purposes. Generally, effective non-profits have a $.15 cents on every dollar administrative cost or better, meaning that each gift is reduced by 15 cents to fund the general operations of the organization and 85 cents are spent on program activities.

At the Rotary Foundation, the three-year investment cycle virtually ensures that 100% of every dollar donated is being used for programs, with the earned interest funding administrative costs.

The real benefit of unrestricted gifts is that they can be used to fund any program in need. It is not necessarily a requirement to fund polio eradication efforts with restricted dollars or support Matching Grants with restricted dollars.

50% of our SHARE funds go back to the district and are disbursed by the district, funding activities such as:

- District Simplified Grants
- Matching Grants
- Ambassadorial Scholarships
- Grants for University Teachers
- Additional Group Study Exchange
- Rotary Centers
- Polio Eradication

The 50% World Fund allocation funds activities such as:

- One GSE Team per district
- Matching Grant match funding
- 3-H grants
- Volunteer Service Grants
- Polio Eradication
- Rotary Centers

Although the districts control their 50% share through DDF, by taking advantage of GSE team exchange and Matching Grant funding, the additional shares quickly add to the 50% share the district started out with. In some cases, by receiving competitive Matching Grants or 3-H grants, districts can receive more in return than the original total Annual Programs Fund contribution from their members.

Unlike restricted gifts, unrestricted gifts (if used as DDF) are matched $1 for every $1 when used for Matching Grants. Matching grants funded exclusively with DDF monies are approved an average of 8 weeks sooner than Matching Grants that are funded – even in part – by restricted funds. Unlike restricted gifts, a portion of the Annual Programs Fund is guaranteed to come back to be used locally in the club's own community as District Simplified Grants.

A contribution to the Annual Programs Fund is a good investment:

- it can be used locally as well as internationally
- it covers the operational costs of the Rotary Foundation (without getting diminished by investing it for 3 years)
- it can be used on programs that have the most need
- it offers more opportunities for club recognition

	Grant funded with restricted club gifts, no giving to APF/SHARE	Grant funded with DDF, and club contributes to APF/SHARE
Cash from Club, Individual or District	$10,000 given restricted to a Matching Grant	$10,000 given to APF/SHARE
DDF contributed to Matching Grant	$0	$10,000
Match from TRF ($0.50 to $1 for cash or $1 to $1 for DDF)	$5,000	$10,000
Funds for Matching Grant	$15,000	$20,000
DDF for district in 3 years	$0	$5,000

Illustration of restricted versus unrestricted Matching Grant funding

Developing Paul Harris Societies

About Paul Harris Societies

The Paul Harris Society is a special district recognition program designed for Rotarians who wish to support The Rotary Foundation in a more substantial way each year. The Paul Harris Society recognizes Rotarians and friends of The Rotary Foundation who annually contribute US$1,000 or more to the Annual Programs Fund, PolioPlus, or the Humanitarian Grants Program.

The first Paul Harris Society was established in 1998 in District 5340 (California, USA) by District Governor Wayne C. Cusick. The idea gained momentum and quickly spread to other districts throughout the world. The Trustees of The Rotary Foundation officially approved the Paul Harris Society as a district administered recognition program effective 1 July 2006.

As of June 2007, 177 districts have officially launched Paul Harris Societies. In 2006-07, 20,446 donors (less than 2% of total membership) personally contributed US$1,000 or more to APF-SHARE, representing 30% of our Annual Giving. The Paul Harris Society has been, and will continue to be one of the most important contribution levels and appreciation programs towards achieving our annual giving goals. Increased annual giving also means additional district funds become available to support local and district-driven projects through District Designated Funds (DDF).

In 2006-2007, 20,446 donors (less than 2% of Rotary's total membership) personally contributed US$1,000 or more to APF-SHARE.

Their share represents 30% of our Annual Giving total for that year.

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.

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.

Keys to success:

- 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.

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 database, 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$1,000 outright gift towards the Annual Programs Fund, PolioPlus and Humanitarian Grants.

A number of districts promote giving $100 a month through TRF-DIRECT (US and Canada) 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.

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 from a number of RI licensed vendors.

Action Steps

Goal Setting

- Review prior year club goal setting efforts. How did clubs do that set goals compare to clubs that did not? What are the trends in your area?
- What are the challenges expressed in your districts about the goal setting process? Is there a way to simplify it? Can club goal setting be emphasized earlier? Can District Governors-elect collect club goals at PETS?
- Do districts use the club goal setting process to engage clubs in talking about the Foundation? Discuss possible approaches to better promote the benefits of setting a club goal.
- Is there a process in place to help clubs determine their goal amount? Or do most of them just multiply the number of members by $100?
- Discuss strategies to help clubs set stretch goals rather than low and achievable goals.

Annual Programs Fund giving

- What strategies can you develop to have clubs send contributions early?
- Discuss possible strategies to move districts to $100 per capita/$200 per capita, etc.
- Does each club have a Club Foundation Chair?
- Does each district have an active Annual Giving Subcommittee Chair?
- What is the rate of Sustaining Members in your area? How can we promote the Rotary Foundation better to have a greater number of donors/a greater number of Sustaining Members?

Sharing our story effectively

- Does your Foundation presentation have a strong message? Do you use personal stories that illustrate Foundation programs and allow the audience to connect emotionally with your message?
- Do you ask your audience to take action?
- How can District Governors, District and Club Foundation Chairs and Club Presidents become more effective ambassadors and presenters of The Rotary Foundation?
- Is it possible to provide training at GETS or PETS to help them become more effective speakers and leaders? What would such a session look like? How would you measure success?
- Does each district have an alumni chair?
- Is there a list of Rotary Foundation alumni that are willing and able to present at club and district events to allow Rotarians to put a face and a story with the work of our Rotary Foundation?
- What is the timing in your zone, your district or your club to promote the Foundation, to thank, and to ask for new support? Could you develop a zone or district calendar to promote the Foundation and Foundation giving in a more strategic way?

Paul Harris Society

- How many districts in your area have Paul Harris Societies? How long have they been active? Does each district have a designated Society Coordinator?
- How many of the districts that do not have an active Paul Harris Society have discussed starting one? How can you help promote the implementation of Paul Harris Societies?
- What resources do districts need that have an existing Paul Harris Society? How do they grow their membership?
- What resources do districts need that do not have a Paul Harris Society?
- What other ways of regular giving and regular giving recognition can you promote?

Major Gift Development

Framework of Major Gift Fundraising

What is a Major Gift?

The Rotary Foundation defines a major gift as US$10,000 or more. Major gifts are important to The Rotary Foundation's fund development efforts. They make up a significant percentage of total dollars raised by The Rotary Foundation and are key to meeting the fundraising goals for both the Annual Programs Fund and the Permanent Fund.

Major gifts (a single contribution of $10,000 or more) are different from Major Donor recognition, which also recognizes donors who make multiple smaller gifts that cumulatively total $10,000 or more.

This section focuses on the cultivation and solicitation of major gifts, not Major Donor recognition.

Key differences between annual and major gifts:

Annual Gifts	Major Gifts
Pay now, usually once per year.	Payment sometimes deferred and in increments.
From income.	From assets.
General solicitation, all Rotarians.	Targeted, personalized appeals.
Typically given to the Annual Programs Fund.	May be made to the Annual Programs Fund, the Permanent Fund, or to a special cause such as PolioPlus.
Easier decision (discretionary income).	Carefully considered decision, most often in consultation with life partners and/or family.
Quantity of unrestricted gifts makes impact.	Amount and focus of gift makes impact.
Repeats, annually at least.	Can repeat, but repeat gifts may take 18 month to 5 years to develop *(major gift donors are often the best new major gift prospects)*.
Organization's timetable drives giving.	Individual's timetable and circumstances drives giving
Organizational goals and needs.	Individual's goals and needs and how they align with the goals of the organization
Donors are motivated by being asked	Donors are motivated by potential impact and change their gifts can make. Gift is seen as a investment in the organization. Although the donor's motivation is different, most major gifts still require that the donor is asked at some point to make a significant gift.

Each major gift solicitation is unique based upon the donor, his or her interests, the timing of the gift, the current needs of the Foundation, and a number of other factors. Each major gift involves a time-intensive process of cultivating and soliciting the donor. Volunteers and staff may become privileged to certain sensitive personal and financial information while working on a major gift; the confidentiality of this information must be respected.

Characteristics of a Major Gift:
- US$10,000 or more as defined by The Rotary Foundation.
- Typically comes from a donor's capital assets rather than discretionary income.
- Typically comes from donors who have contributed to The Rotary Foundation in the past.
- May be made to the Annual Programs Fund, the Permanent Fund, or to a special cause such as PolioPlus or Rotary Centers.
- Typically the result of personal cultivation and solicitation by a volunteer and/or staff member.
- Require both financial capacity of the donor and the donor's commitment to the Foundation.
- Involves matching the donor's interests with the needs of the organization.
- Often developed over an extended period of time; some major gifts may take many months or even years to materialize.

Major Gifts Serve the Goals of the Foundation by:
- Helping to achieve fundraising goals much more effectively than annual gifts alone.
- Indicating that Rotary is an organization worth supporting.
- Inspiring achievement of annual giving goals. Major gifts to the Annual Programs Fund, for example, can be leveraged as challenge gifts within a Rotary club or district to spur greater giving among members.
- Motivating others to make major gifts: Recognizing major donors publicly raises awareness about opportunities for supporting the Foundation and may encourage others to consider major gifts of their own.

Major Gifts Serve the Goals of the Donor by:
- Fulfilling personal philanthropic goals.
- Offering the opportunity to leave a legacy through an endowed gift.
- Providing other benefits such as tax deductions in countries where appropriate.

Donors of Major Gifts want to:
- Be confident that the organization can put their investment to good use.
- Be confident of the organization's management and leadership.
- Be confident of the organization's prudent stewardship of their contribution.
- Visualize the impact their gift has through the works of the Foundation.
- Understand the outcomes of the gift and its impact.
- Know that other donors are making gifts.

The Rotary Foundation's Major Gift Effort

The Rotary Foundation has received major gifts throughout its history and has been actively developing a major gifts effort since 1996, when the Permanent Fund Initiative (PFI) was launched. The objective of the PFI was to ensure a secure future for the programs of the Foundation by building a strong endowment fund. The original goal of US$200 million for the Permanent Fund by the year 2005 was met six years ahead of schedule; the Trustees have approved a new target of US$1 billion by 2025. (Permanent Fund totals include both net assets and expectancies.)

The Permanent Fund has become an important source of support to programs. The principal is never spent, while a portion of the interest earnings each year help pay for programs.

Before a major gift can occur, the prospect must meet three qualifying conditions of **linkage**, **ability** and **interest**:

- Linkage – Is the individual connected to Rotary in any way? Is he or she a Rotarian? Is he or she close to a Rotarian with a very favorable view of the organization and the work of The Rotary Foundation?
- Ability – Does the prospect have the financial means to make a major gift?
- Interest – Is the donor interested or motivated to support The Rotary Foundation or one of its programs? Are the programs, mission and values a good fit with the donor's personal values and goals?

All three conditions *must* be met or a major gift *will not* be made. Each major gift prospect needs a solicitation strategy. The fundraising team determines what steps are needed, what supplemental materials are used and who will be involved. Making the case for a major gift involves explaining why The Rotary Foundation is worthy of a sizable gift, how it will be used and how it will address the needs and problems identified by Rotarians.

The **Case for Support** addresses the following questions:

- What is the real difference The Rotary Foundation makes?
- How would the world be worse off if the programs and initiatives of The Rotary Foundation ceased to exist? How would the world be better if these same programs were better funded?
- How will this major gift help us achieve our goals?
- Why this gift amount and why at this particular time?
- If The Rotary Foundation was to receive this major gift, how can we show that it will make a difference?

The Four-Step Process

Raising major gifts involves four key steps:

- Identification – Deciding who your prospects are
- Cultivation – Preparing prospects to be solicited for a major gift
- Solicitation – Making the ask for the gift
- Stewardship – A process of recognizing the donor and continuing the relationship between the donor and the Foundation

Identification

The first step in major gifts work is **identifying potential donors** of major gifts. Each district Permanent Fund committee should have a list of active prospects that is continually evolving and updated based on new information and donor activity. **The Identification** step also includes the sub-steps of donor **Qualification and Rating** and **Strategy Development**.

Each district should have a Major Gift and Permanent Fund Committee in place.

Each district Permanent Fund committee should have a list of active prospects that is continually evolving and being updated based on new information and donor activity.

First, consider whether the prospect has the financial capacity to make a gift of US$25,000 or more. (The Rotary Foundation defines a major gift as US$10,000 or more. Because of the large pool of prospects for major gifts, however, staff and volunteer leaders are encouraged to focus their efforts primarily on those who have the capability to make a gift of US$25,000 or more.)

What are the **significant characteristics** of the prospect and why do we think this individual would make a major gift? At this stage, this is a very general discussion of potential prospects. We are possibly looking at a series of gifts over time, dedication to Rotary, showing strong involvement and understanding of the Foundation.

Which of these **qualities** does the prospect have?

- Awareness of The Rotary Foundation and its programs
- Interest in supporting the Foundation
- Involved in Rotary service projects
- Concerned about the needs the Foundation tries to address
- Committed to addressing those same needs
- Capable of giving a significant gift
- Accessible and available to meet with Rotary leaders and Foundation staff
- Experienced as a significant donor (even with other organizations)
- Desire for personal fulfillment

A potential prospect need not meet all of these qualities, but the more qualities they have and the stronger we can rate them as having these qualities, the more likely it is that a major gift will occur.

Sources for Finding Prospects

There are many ways to identify prospects in a club or district. Four of the best sources are:

- Major Donors
- Bequest Society members
- Benefactors who are Paul Harris Fellows
- Paul Harris Society members and Rotarians who make large annual gifts

Those who have already made a significant gift or commitment to the Foundation are the most likely prospects for a future gift. Reports of current Major Donors, Benefactors, and Bequest Society members can be obtained from Fund Development staff.

Getting clubs involved in the identification process is key. Involving club leadership increases knowledge about the Foundation's major gift effort, helps build advocates, provides a source of accurate knowledge about prospects, and helps cultivate future solicitors. It is recommended that the District Permanent Fund Committee stays in regular contact with the clubs in the district.

Qualifying the Prospect
To further **qualify** the prospective donor, determine who best knows this person and could further work with him or her. What is the prospective donor's possible interest and how can we match it with the programs of the Rotary Foundation?

Those who have already made a significant gift or commitment to the Foundation are the most likely prospects for a future major gift.

Has the Rotarian or spouse made gifts of US$25,000 or more to other charities?
- College/University
- Religious Institution
- Hospital/Medical Institution
- Non-profit Agency

Does the Rotarian or spouse have the financial capacity to make a gift to The Rotary Foundation of $25,000 or more? Factors to consider:
- Employment/profession/business ownership/senior executive
- Family inheritance
- Primary residence/vacation home
- Real estate owner/rental properties
- Limited family obligations
- Working/retired
- Family foundation
- Travels extensively

Do you believe that the Rotarian or spouse has the financial capacity to make a gift of $25,000 or more...
- Outright in one year?
- Outright over three to five years (pledge)?
- In deferred form during life (life income agreement)?
- Through an estate distribution (will or trust)?

Once you have determined prospects' financial capacity, you will want to rank your prospects to determine their readiness to give. Use the following grid:

High ↑ Readiness to give ↓ Low

	I.	II.	III.	IV.	V.	VI.
A	***Dedicated Volunteer***					
B						
C						
L	*Most Unlikely*					

Low ← **Gift Potential Rating** → **High**

Gift Potential Rating
I. – under US$25,000
II. – US$25,000 to $49,999
III. – US$50,000 to $99,999
IV. – US$100,000 to $499,999
V. – US$500,000 to $999,999
VI. – US$1,000,000 or above

Readiness to give
A. – Ready to contribute, highly involved
B. – Requires further involvement or cultivation
C. – Establish interest. Requires further information and involvement
L. – Low readiness to give

☐ Gift Prospects (less than $25K) ■ Major Gift Prospects ($25K and above)

Together with your committee, you will want to prioritize your prospects. Those of higher priority may be:

- Prospects who are ready to contribute
- Prospects who are ranked high in gift potential
- Prospects whose personal circumstances may require early attention:
  - Revising wills, estate plans, or financial plans
  - Approaching retirement;
  - Administering a family foundation
  - Owners of a business or major stockholder in a corporation that is subject to a buyout
  - Planning a major transfer/sale of real estate, subject to large capital gains tax
  - Selling a business

Train your districts to review their Major Donor and Bequest Society list.

Ask the Permanent Fund and Major Gift Chairs to rate those prospects and seek additional input from Club Presidents and Club Foundation Chairs.

Develop a cultivation strategy for Top 10 prospects.

Developing and Donor Strategy

After identifying and rating your prospects, focus your efforts on your top rated individuals. Is additional information about these individuals available at the district or club level that would change their rating?

- What information on the donor is already easily available?
- For what purpose should the prospect be asked?
- What do we know about the prospective donor? Their interests, concerns, previous gifts to The Rotary Foundation and other organizations?
- Who should be involved from our perspective (key volunteers, district leaders, staff)? Who should be involved from the prospective donor's perspective (spouse, life partner, children, financial adviser, others)?
- Who should make the "Ask" for the gift?
- When is the right time to ask? Can the "Ask" be made in conjunction with staff, RI Director or Rotary Foundation Trustee travel in the area?
- What is the specific amount requested?
- In what form will the gift be solicited (cash, securities, real estate)?
- How much time will be needed – from getting the initial appointments to asking for the gift and negotiating the details?
- Where does the donor prefer to be solicited?
- How would the donor like to be recognized?

Cultivation

Cultivation is the second of the four key steps and involves preparing prospects to be solicited for substantial financial support.

The key is:
- **Education** of prospect on Foundation programs
- **Involvement** of prospect in Foundation programs
- **Continuous Connection** between prospect and solicitor/team

Establishing Gift Objectives
Amongst the district Permanent Fund committee, you will want to develop suggested gift objectives such as gift amount, purpose, cultivation/solicitation timetable, and means of giving for each prospect and discuss these objectives. For example, you may plan to ask Prospect Joe Smith for $25,000 outright for a named Ambassadorial Scholarship in three months, once the sale of his business is complete. Of course, these objectives are tentative and open to refinement as understanding of the prospect develops.

Learning more about the Prospect
The heart of cultivation is learning about the prospects so their interests and resources can be matched as efficiently as possible to the Foundation's needs. A more thorough understanding of prospects leads to a more effective solicitation strategy. Every contact with the prospect is an opportunity to learn important information like:
- Biographical information (ages of prospect and spouse, children's ages, hobbies, occupations)
- Rotary information (current attitudes about Rotary, friends and contacts within Rotary, level of commitment to Rotary)
- Financial information (giving to other institutions, real estate owned, business interests, stock holdings, collections such as art or antiques, retirement plans, estimated income)
- Charitable interests (education, hunger, health, children)

Cultivating the Prospect
A cultivation plan is tailor-made for each prospect and includes multiple "contacts," a timetable, and assignments as to who will do what. Remember to allow sufficient time for prospects to become involved and to "sell themselves" on a major gift.

Cultivation ideas include:
- Meet with prospect to discuss Foundation programs and their areas of interest.
- Invite prospect to be a member or chair of a district committee related to their area of interest.
- Ask for prospect's advice on projects or issues concerning the club or district.
- Invite prospect to meet with distinguished Rotary leaders visiting the club or district.
- Arrange for Foundation alumni (past scholars, GSE teams, volunteers) to speak at a club or district event and invite prospect.
- Invite prospect to meet with alumni and/or attend events such as Ambassadorial Scholarship orientation sessions.
- Invite prospect to visit a Foundation project.
- Invite prospect to join district groups visiting RI World Headquarters in Evanston.

- Encourage prospect to serve as GSE Team Leader or host a GSE team member.
- Encourage prospect to serve as a Rotary Volunteer (ex. dentist goes to India for a month to practice dentistry there).
- Invite prospect to serve as head of a break-out session at a District event on a topic of interest to the prospect.
- Organize a cocktail reception, breakfast, lunch, or dinner for prospects, current Major Donors and Bequest Society members at a district conference or other district event.
- Recognize Major Donors and Bequest Society members at receptions or other events.
- Call or send notes to prospects on special occasions (holidays, birthdays, etc).
- Hold an estate planning seminar and invite prospects.
- Have publications sent to prospect based on interest (ex. alumni newsletter, Rotary Centers Chronicle, *Visions* newsletter, Rotary World).
- Host a cultivation event. Bring in Foundation alumni and/or Major Donors to speak on their experiences with Foundation programs or why they gave.
- Anything else to involve them in a special event or activity of your District.

Follow-Through

Follow-through is essential. District Permanent Fund Committees are encouraged to develop a calendar to track activity and provide a record for strategizing contacts and reviewing progress at meetings.

Periodic meetings of the committee should be held to review progress and plan future contacts. Some questions to discuss at these meetings include:

- How long has it been since the last contact?
- Has each prospect been reviewed to determine when the next contact should be made?
- Have I zeroed in on my prospect's main interests?
- Has the prospect experienced any changes in his/her life that would alter the direction of the next contact?
- Has gift potential been carefully assessed based on financial capability and interest?
- Who are the prospect's close Rotary friends? Should they be involved in the cultivation or solicitation? Who would be the best volunteers to work with the prospect?
- Am I using the potential "clout" of Rotary leaders in the club or district?
- Is it time to make another personal call?
- Is there an upcoming birthday, anniversary, or other special occasion on which the prospect should be remembered?
- Is there an appropriate occasion for an invitation to my club or other Rotary event?
- What is the next move?

All interaction with the prospective donor must have a purpose. What is the reason for this contact with the donor and what is the expected or intended outcome?

Document the outcome of your interaction with the prospective donor and report all gathered information. Make an effort to move towards closing gifts, focus on the next step in the cultivation strategy to keep moving gift discussions along.

All interaction with the prospective donor must have a purpose.

What is the reason for this contact with the donor and what is the intended outcome?

Solicitation

If the prospect has been cultivated properly, the district Permanent Fund committee will know when to ask, who should do the asking, how much to ask for, and what to ask for. Fund Development staff are important resources to you in supporting, planning and managing any major gift solicitations.

The Major Gifts Volunteer Structure
To ensure success in major gifts work, communication is essential among:

- RRFCs, Major Gifts Advisers and Strategic Advisers
- Strategic Advisers/Major Gifts Advisers and Permanent Fund Chairs
- Strategic Advisers/Major Gifts Advisers and Rotary Foundation staff Gift Officers (Major Gifts, Planned Giving and Annual Giving Officers)
- District Permanent Fund Chairs, District Governors, and DRFCCs

Major gift fundraising requires leadership and collaboration among all members of the team. Fundraisers need to acquire the necessary leadership skills and help others on the team realize how these skills impact major gift fundraising efforts:

- Share goals in a way that captures the imagination of others.
- Affirm the values of Rotary International and The Rotary Foundation and act as an ambassador of the mission and values of the Foundation.
- Motivation. Leaders find out what motivates people and provide appropriate circumstances for motivation to take place.
- Reach a workable level of unity among the team.
- Lead by example. It is easier to ask for significant contributions when the person making the "Ask" is already a major donor.
- Keep others committed to and excited about developing major gifts.

A major gift is not about the money.

It is about finding what the donor is passionate about and positioning The Rotary Foundation as a vehicle to help them see their dreams and visions for a better world fulfilled.

Done right, a major gift is as beneficial to the donor as it is to the Foundation.

Preparing for the "Ask"
It is now time to set a specific appointment with the prospect, make the visit, and ask for the prospect's major gift. Try to arrange a 45-minute meeting in the prospect's home or other private, informal environment. Tell the prospect the purpose of the meeting and who will be there. Keep your request brief and invite the spouse to be present.

Following is a checklist to assist you in preparing for the appointment:

- Create sense of urgency to secure appointment
- Be sure to bring personalized major gift solicitation materials
- Do your homework (know the donor's history and previous conversations)
- Anticipate questions and/or stumbling blocks
- Script the appointment
- Rehearse
- Don't waste time – yours or the prospect's

Characteristics of a Successful Solicitor

- Knowledgeable and honest in their presentations
- Patient in their negotiations
- Infectious in their enthusiasm
- Active listener

How to ask for a Major Gift

- Preface by bestowing honor and praise on a donor
- Be considerate; ask for "consideration"
- State a specific amount
- State the specific purpose
- Don't speak until a response is made
- Once the solicitation has been made, your role is to be an active listener

The "Flow" of a Major Gift Solicitation (based on a 45-minute meeting)
Use open-ended questions to listen to the prospect's interests and desires and reconnect them with their passion for Rotary through their own experiences.

Use closed-ended questions to guide the conversation in a specific direction and to get indicators how the conversation is going.

Opening	Friendly exchange, questions about how the prospect is doing personally and professionally. Keep it moving along.	4 Minutes
Transition	Use a closed-ended question to request permission to get to the business of the meeting*: "I hope this is still a good time for us to discuss…"*	1 Minute
Discussion	Ask many open-ended questions to encourage the prospect to give richer, more personal answers to connect them with positive Rotary experiences. Example: *"Can you tell me about an experience that has most affected you as a Rotarian?"* The prospect should do most of the talking.	25 Minutes
Transition	Use another closed-ended question to transition to the next phase of the discussion: *"I think we both know about the role and importance of our Rotary Foundation in helping address these problems. Would you agree that continued support of these programs is an important investment for us as Rotarians?"*	1 Minute
Discussion	Use open-ended and closed-ended questions to move the conversation along. The prospect should still do most of the talking. Questions can be: *"Is there anything else you would like to know about …" – "Have you considered including The Rotary Foundation in your estate plans?"*	10 Minutes
Purposeful Ask	Based on the point of your development cycle and the potential readiness of the prospect to make a commitment, proceed with a direct question that will take the prospect to the next stage in the solicitation process: *"It sounds like you are interested in including the Foundation in your estate plans through a life income agreement. Would you like me to have the staff at One Rotary Center prepare the initial paperwork for you to review with your Financial Adviser?" – "Would you consider making an investment in our Rotary Centers program of $100,000?"* **Important:** Allow the prospect time to respond. Once the question is asked, do not ask a hasty follow-up question.	2 Minutes
Closing	Thank the prospect for their time and their consideration/generosity. Set the stage for a possible next step or next meeting.	2 Minutes

Sample questions for the first part of the discussion – The intended outcome is to determine if the prospect is interested in helping Rotary and if they have the financial capacity to do so. The other intended outcome is to get the prospect to verbalize their passion for Rotary and come to their own conclusion that financially supporting The Rotary Foundation is the logical next step.

- How did you get involved in Rotary?
- What keeps you connected to your club and Rotary today?
- Which programs have you gotten involved in over the years?
- Tell me about your club.
- Is your spouse/your family involved in Rotary? Are your children old enough to participate in what Rotary has to offer (Youth Exchange, Rotaract, Ambassadorial Scholars)?
- How do you manage to balance your family/work/Rotary?

Sample questions for the second part of the discussion – The intended outcome is to create an awareness of giving opportunities, and determine the likelihood, timing or the type of gift that might appeal to the prospect.

- Do you know much about the Foundation/this specific program/the work we do?
- May I share with your some updates about Rotary Centers/Polio/Grants/…?
- Some of the things we try to encourage our key members to do is:
    - Consider a bequest gift: "*Were you aware that certain types of gifts can produce current income for you and your spouse, such as a Charitable Gift Annuity?*"
    - Increase you annual giving to our Foundation
    - Make a leadership gift to inspire others
- Is there anything you'd like more information on?

Lead the prospect to talk. Your questions should guide the conversation and build on what the prospective donor is saying.

Additional Tips

- Never ask if the prospect wants to give because you then have a 50/50 chance of a "NO" answer. Instead, say, "We presume that you want to support The Rotary Foundation, and we want to help you find the best way to do it."
- Never ask for a "donation" – it implies a thoughtless token gift, solicited on the street or at your door. The best word is "investment," especially with major gifts.
- Do not expect to obtain a "yes" in one call. In fact, if you get a "yes" on the first call, you probably haven't asked for enough! Give the seed you plant time to germinate before your second or even third call. And if he or she was not present on the first visit, do not forget to invite the spouse.
- The best major gift solicitors are those that practice *active listening* during the solicitation. You should aim to spend 25% of your time talking and 75% listening.

Conduct the solicitation visit with enthusiasm and conviction. Discuss the prospect's interest and involvement with The Rotary Foundation. Share your own commitment to the Foundation. Explain the need for the prospect's own leadership example. State the case or need for their contribution and ask for a specific amount.

Remember to use a personal touch. People do not generally give *to* causes. People give to people *for* causes. A prospect will become a donor as much because of your own sincerity and conviction as because of his or her genuine interest in Rotary's work.

Major Gift Solicitation Errors

- Not understanding that the best major gift prospects are past donors
- Not asking for a gift; leaving it open-ended
- Not asking for a large enough gift
- Failing to cultivate prospect's interests
- Lack of knowledge about prospect's interests
- Asking for the gift too soon
- Not fully understanding case for support
- Failing to talk about benefits of giving
- Failing to involve the right person in the solicitation

In Summary

- You must ask for a major gift in order to receive one!
- Work with the Fund Development Staff to develop and manage your solicitation plan.
- By soliciting major gifts to the Foundation, you provide Rotarians a tremendous opportunity to invest in the future of the world and the satisfaction and joy that comes from doing so.

Handling Objections

There are four basic kinds of objections, each of which requires a special response. Address the objection, but do not argue with the prospect. Objections may reveal something about the donor's values and may mask areas that could negatively or positively change the relationship with the organization.

It is common to encounter a variety of objections when asking for a major gift. Objections are emotions, issues or personal experiences that must be addressed to get to "yes."

Misunderstandings – "I don't understand…"
This is the easiest objection to overcome. Clarify and gently correct with the facts.

Indifference – "I don't care."
This type of objection can mask a bad experience the prospect may have had with the organization. Use open-ended questions to help the prospect re-discover his or her positive feelings for Rotary and the Foundation.

Skepticism – "I don't believe…"
The doubter will need an expert (staff, program participant, personal witness account of the work being done…) – or comprehensive information – who will support and reinforce your message. Your word will not be enough. Possible answer: *"I'd like to get you in touch with someone from our Fund Development staff who can tell you exactly how the money will be used. What would be a good time for you to have a follow-up conversation?"*

Real Drawback – "I don't like it."
This could be a very charged objection, and one to address carefully:

- Clarify the objection
- Acknowledge the prospect's feelings. Restate the objection as a question and use follow-up questions to help narrow the objection to a specific issue.
- Try to minimize the impact of the objection in favor of the bigger picture.
- Try to gain a neutral position between the prospect's objection and the bigger picture. Ask if the objection would prevent the prospect from making a gift at this time. Summarize and end the conversation on a positive note that leaves the door open for future follow-up if the prospect remains reluctant to give at this time.

Possible Donor Objections and Sample Responses
That's a lot of money you're asking for…
"We know it is, and we don't take that lightly. But you are one of the few people we can turn to for the necessary leadership to make this shared vision a reality."

I'd like to think it over.
"Certainly, we'd like to have you think it over. Why don't I call you back in a week or 10 days to set up another appointment?"

I will need to see what my attorney and accountant have to say.
"Of course we want you to receive good counsel and make your decision in the context of personal and family priorities relative to taxes and finances. What we hoped to accomplish today was to reach agreement regarding xyz program and the support needed to make it become reality. The details do not need to be addressed today, but what I would like to know is your degree of shared enthusiasm for the opportunity we reviewed."

I'll do something, but I really can't do what you're asking for…
"We deeply appreciate your support and your consideration of this opportunity. Whatever you decide will be the right outcome, but we would have felt remiss if we failed to present to you this exciting opportunity to XYZ. It is a lot to consider, and I'll plan to give you a call next Thursday to answer any questions you may have and to discuss the next step in the process."

I'll need to talk it over with my spouse.
"We are eager to have you talk it over with _______. We thought you might want to do this and perhaps it would make sense for all of us to get together early next week. What do you think your husband/wife would want to know?"
Note: Spouses should be included in meetings regarding potential gifts.

I have already given several gifts to the Foundation.
"We very much appreciate your generous support of the Foundation; one of the reasons we have approached you today is because of your clear commitment to Rotary. XYZ program presents a special opportunity to our loyal supporters to help Rotary further its mission of world peace and understanding."

Getting a "Yes" Response
This is, of course, our favorite response. When it is also the response you receive, you will want to thank the donor and move on to discussing how he or she prefers to make the gift. Review the appropriate gift process with the donor and notify the Fund Development Major Gifts Officer.

To facilitate this discussion you will want to be familiar with the general aspects of the gift acceptance process. (See information on gift options.)

It is important to transmit information to the donors and to staff to expedite the gift review, acceptance and acknowledgment process. The goal is to make the transfer of gifts a positive and comfortable experience.

Ending the Visit
End the call on a positive note and thank the prospect for their time.

After The Visit
Follow up! If you have closed at the first call, send a thank-you letter right away. If you have not closed, write and thank them for their time and consideration, and leave the door open for another call.

Stewardship and Renewal

Stewardship is not an event. It is an ongoing process and includes (but is not limited to):

- Presentation of the appropriate recognition item (this can be done more than once, for instance: at the donor's club, a Foundation dinner and the District Conference).
- Special thank-you calls and letters from your District Governor, District Permanent Fund Committee Chair, and other district leaders.
- Continuous updates on Foundation news, programs and activities (Foundation staff sends updates to donors on a periodic basis).

Be sure to communicate with your regional Rotary Foundation coordinator, Major Gifts Adviser, Strategic Adviser, District Permanent Fund Chair, Foundation staff and district leadership to ensure that the donor is properly recognized.

Recognition

Recognition is critical for several reasons:

- A recognized donor serves as an example to other prospective donors;
- Recognition highlights the important work of The Rotary Foundation;
- Most donors appreciate being recognized.

Significant Rotary Foundation Recognition Levels

Amount	Major Donor	Bequest Society
$1 million or greater	Level Six	Level Six
$500,000	Level Five	Level Five
$100,000	Level Four	Level Four
$50,000	Level Three	Level Three
$25,000	Level Two	Level Two
$10,000	Level One	Level One

Arch C. Klumph Society

Donors whose cumulative gifts total **$250,000 or more** will become members of the Arch C. Klumph Society and have their photos prominently displayed in the Arch C. Klumph Gallery at RI headquarters.

Of course, sometimes donors prefer to remain anonymous or are uncomfortable with public recognition ceremonies. Always consult with the donor(s) before planning any events or announcements of their gift.

Keeping the Connection

The following items are some suggested ways to keep in touch with donors:

- Involvement in club presentations
- Invitations to district Foundation dinners
- Special letters or reports updating them on the district's program activity

The Rotary Foundation will continue to keep these donors involved in the future by sending updates on Foundation programs and inviting them to special events.

Involvement with the donor continues after the recognition item is presented. Staying in contact with the donor reinforces their commitment, helps ensure their continued involvement and encourages additional future gifts.

Maximizing a TRF Staff or Rotary Senior Leader Visit to your Area

Rotary Senior Leaders (including Directors, Directors-elect, The Rotary Foundation Trustees and Trustees-elect) can play a significant role in helping secure major gifts from significant supporters. In addition, Major Gifts Officers (MGO), Planned Giving Officers (PGO) and Annual Giving Officers (AGO) focus much of their time meeting with major donors and major gifts prospects who have been identified by district and club leaders. They also participate in various district events designed to support The Rotary Foundation.

When planning a district or Foundation event, consider the availability of these volunteer leaders and fund development professionals to help plan and execute an major donor strategy in your area.

Benefits to the Foundation, the District and the Donor:

- Net gain in gifts and commitments to The Rotary Foundation.
- Activity generated by an upcoming trip can often serve as a catalyst for fundraising activity.
- Educate district leadership on methods of giving major gifts.
- Strengthens the relationship between The Rotary Foundation and the donor.
- Moves major gift prospects along in the “process”.
- Broadly reinforces message of “giving”.
- Uncovers full capacity of the major gift prospect/donor.
- Better serves the major gift prospect by identifying their true philanthropic interests and matching them with the needs of The Rotary Foundation.

How to set a trip in motion:

- Anchor trip around a major district event (MGA or SA, TRF Gift Officers will need at least two to three months prior notice, Rotary Senior Leaders will likely need more advance notice).
- Set a fundraising goal (for example: “One Million Dollar Dinner” event, or a specific number of gifts for specific total dollar amount)
- Work with district leadership to identify key prospects for private meetings and key group meetings (District Leadership: 8 weeks prior).
- Identify key volunteers to arrange and participate in meetings with the major gift prospect (District leadership: 6 weeks prior).
- Initial contact made by volunteer, pre-approach letter sent by Gift Officer (1 month prior, North America only).
- Volunteer to provide initial background on prospect/donor research developed.
- Ideal appointment involves 3 parties: TRF staff, zone-level volunteer or Senior Rotary Leader/key volunteer/potential donor.
- Post appointment follow-up: combination volunteer/TRF staff.

Rotary Foundation fund development staff can be your resource for:

- Co-soliciting of major gifts
- Gift Proposals
- Planned Giving Illustrations
- Donor Research
- Training
- Coordination and support for major donor and major gift prospect events
- General information about The Rotary Foundation

Gift Types

Many types of gifts are accepted. The following assets may be given: cash, securities, real estate, life insurance, IRAs (Individual Retirement Accounts), and tangible personal property. There are a variety of ways to transfer assets: as an outright gift, pledge, bequest, life income agreement or donor advised fund. Please note: non-cash gifts may require review by the Gift Acceptance Committee.

Gifts of Cash	■ Donors can make outright gifts either with a check made payable to The Rotary Foundation or by wire transfer. ■ Donors can make pledges that are a minimum of US$10,000 to be paid over a period up to 3 years. Major Donor recognition is given upon receipt of the first payment on the pledge.
Securities	■ Donors can transfer securities to the Foundation by mail, hand delivery or by wire through their broker. ■ Valuation is the average of high and low stock price on gift date. ■ Gift date determined by postmark, date of hand delivery or date of receipt into The Rotary Foundation account.
Real Estate	■ Gifts of real estate are evaluated on a case-by-case basis. ■ Donors must obtain an independent, qualified appraisal of the property to initiate the process. ■ The Foundation may accept ownership of outright gifts of real estate with a minimum appraised value of $25,000 when undeveloped and $100,000 when developed. ■ To fund a charitable remainder unitrust, the property must be valued at at least US$100,000.
Life Insurance	■ Whole and universal life insurance policies are usually assignable. ■ Term life insurance policies are not accepted. ■ The life expectancy of the insured must be less than 15 years on an actuarially determined basis. ■ TRF may liquidate the policy for its net cash value. ■ In order for TRF to assume ownership of a policy, TRF must be irrevocably named owner and full beneficiary. ■ Policies that are partially paid will continue to be paid by the donor either through TRF or directly to the insurance company. Term life insurance is not eligible for recognition.
Gifts of Tangible Personal Property	■ Gifts of art and collectibles will be evaluated on a case-by-case basis. ■ Such gifts must be accompanied by a qualified appraisal, a photograph and supporting material, such as authentication papers. ■ Suggested minimum for jewelry: US$10,000 ■ Suggested minimum for art and collectibles: US$25,000

Individual Retirement Account (IRA)	■ The Permanent Fund of The Rotary Foundation can be named a beneficiary of an IRA. Donors receive Benefactor recognition or Bequest Society recognition for commitments of US$10,000 and up.
Bequests	■ Donors may make bequest commitments, designating a specific dollar amount or percentage of their estate to be left to the Permanent Fund of The Rotary Foundation. ■ Sample codicil language is available in the Securing the Future brochure. ■ Bequest commitments of any amount receive Benefactor recognition. ■ Bequest commitments of US$10,000 or more receive Bequest Society recognition.
Donor Advised Funds (DAF)	■ A charitable investment account that a donor(s) or Rotary-affiliated group may establish with a minimum initial contribution of US$20,000 to facilitate charitable giving to The Rotary Foundation and other 501(c)(3) charities of choice. ■ The donor(s) receives an immediate charitable tax deduction. ■ The account holder(s) may make an unlimited number of grant recommendations (minimum of US$250) to The Rotary Foundation or other 501(c)(3) charities at any time. ■ Each year, US$250 from “Individual” DAF accounts and one percent of the fair market value of a “Group” DAF account are allocated to the Annual Programs Fund. These distributions qualify for Paul Harris Fellow recognition. Annual grant distributions from “Individual” DAF accounts are applied toward Sustaining Member and Major Donor recognition. ■ Upon the death of the account holder(s), at least 50% of the Individual account balance will be transferred to the Permanent Fund. Bequest Society and Benefactor recognition is applicable at the time the account is established.
Charitable Remainder Trusts	■ A gift arrangement in which assets are transferred to a trustee who manages the assets and pays income to the donor and/or other beneficiaries either for life or a term of years. ■ When the trust terminates, the remaining principal passes to The Rotary Foundation to be used for the purpose designated by the donor. ■ Income beneficiary(ies) must be 50 or older. ■ Minimum of US$100,000; can add additional cash or stock to the trust at a later date. ■ Capital gains tax is avoided when trust is created. ■ Charitable remainder unitrust: pays a variable income, equal to a fixed percentage of the net fair market value of the assets as revealed annually. ■ Charitable remainder annuity trust: pays a fixed amount based on a percentage of the initial fair market value of the gift in trust. ■ Payout rate is between 5% and 7%. ■ Charitable remainder value of the gift must exceed 10% of the principal.

Charitable Gift Annuity	■ Donor transfers cash or marketable securities to The Rotary Foundation. In exchange, donor and/or other beneficiary receive guaranteed fixed payments for life. ■ Payment percentage as recommended by the American Council of Gift Annuities based on the birth dates of the annuitants. ■ May have one or two income beneficiaries; income beneficiary must be at least 50 years old. ■ If funded with appreciated assets, capital gains tax deferred (paid gradually throughout the life of the annuity). ■ Minimum gift of US$10,000. ■ Charitable remainder value of the gift must exceed 10% of the principal.
Charitable Lead Trusts	■ Allows the donor to give The Rotary Foundation trust income either for a specific number of years or for the lives of the named individuals. ■ The donor retains the trust assets for themselves or for other non-charitable beneficiaries, usually family. Trust income from the Charitable Lead Trust is earmarked for the Permanent Fund. ■ Suggested gift of US$100,000.
Pooled Income Fund	■ The Rotary Foundation's pooled income fund is a trust in which the contributions of many separate donors are "pooled" and invested under professional management. ■ Each contribution purchases "units" in the Fund at their current value, and the donor receives a regular share of the Fund's net income in proportion to the number of units owned. ■ Minimum gift of US$5,000; donor can make additional contributions of US$1,000 or more. ■ Charitable remainder value of the gift must exceed 10% of the principal.

Action Steps

- Encourage establishing a full committee in each district.
- Identify a Permanent Fund/Major Gift Committee Chair in each district
- Encourage establishing new major gifts and bequest society members as a district-wide goal.
- Develop a major gift component for district training seminars.
- Train district leaders and Rotary Foundation committee members in the four-step process of major gift development.
- Ensure each district is aware of all Major Donors and Bequest Society members.
- Train district leaders and key volunteers in completing the donor prospect evaluation grid and identify the top prospects in the district.
- A section of the EREY Club Goal includes a goal for new major gifts, new Benefactors and new Bequest Society members. Confirm each district has a method to follow-up with clubs that have set a goal in these areas.
- Explore other areas of major gift prospect identification: Benefactors and multiple Paul Harris Fellows, Paul Harris Society Members.

Rotary Centers and Permanent Fund

Rotary Centers Major Gifts Initiative

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 continue to be the highest educational priority for the Foundation.

The Rotary Centers Major Gifts Initiative seeks named and endowed gifts and commitments worth US$95 million by 30 June 2015 to assure continued funding of Rotary World Peace Fellowships.

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. Two million children were been killed in the past decade in armed conflicts, 12 million made homeless, and many others suffered from psychological trauma, according to the UN Security Council. Armed conflict remains one of the major threats, undermining the rights of children worldwide. 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 2005, the UN reported that armed conflicts are the leading cause of world hunger. The number and scale of conflict-related food security emergencies has doubled since the 1990s.

The Rotary Foundation 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.

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$55 million in named and endowed gifts by 30 June 2010 to help fill a projected revenue-funding gap. It will include at least four strategies:

- 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.
- 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.
- Training of corps of volunteers to promote and solicit major gifts and commitments to the Rotary Centers.
- 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 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.

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, Directors and Trustees
- Regional Rotary Foundation coordinators (RRFCs) who have responsibility for overall coordination of all volunteer fundraising efforts benefiting TRF at the zone level
- Major Gifts Advisers
- Annual Programs Fund Strategic Advisers
- Rotary Foundation Alumni Coordinators
- District Rotary Foundation Chairs
- 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.

Rotary Senior 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 Rotary Senior 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.

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 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 Advisers and District Permanent Fund Chairs.

A calendar of 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.

Major Gift Prospects and Gift Table
The achievement of the US$95 million target hinges on The Rotary Foundation'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.

Below 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 need 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 The Rotary Foundation.

Rotary Centers Major Gifts Table:
Goal: $95 million for 120 Rotary World Peace Fellows per Year

Gift Range	# of Major Gifts needed	Range Total	Cumulative Total	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
Subtotal	**40**		**$72,500,000**	**200**
$250,000	70	$17,500,000	$90,000,000	350
$10,000 - $250,000	250	$5,000,000	$95,000,000	1,250
Total	**360**		**$95,000,000**	**1,800**

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 are listed below.

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.

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 Rotary Foundation’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.

An Invitation to support The Rotary Centers for International Studies in Peace and Conflict Resolution

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. If applicable, 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. If applicable, 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 - 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. Please contact The Rotary Foundation for more information about naming opportunities and ways of giving.

Named and Endowed Fund Opportunities

In appreciation of gifts of $25,000 or more, The Rotary Foundation will honor the donor's contribution by establishing a named fund within the Permanent Fund. If you would like to express your own commitment to Rotary's work, or honor a friend or family member in perpetuity, you can do so in a variety of ways:

- A gift of $25,000 or more will establish a named fund to provide general support for The Rotary Foundation's programs.
- A gift of $50,000 or more can create an endowment for any of The Rotary Foundation's programs: from Scholarships to Matching Grants.
- A gift of $150,000 or more can support a more restricted purpose, a project within a program of your choice. (For example, $150,000 will endow an Academic-Year Ambassadorial Scholarship in your or a loved one's name.)
- A gift of $250,000 or more can serve one or more of the purposes listed above and will qualify the donor for recognition in the Arch C. Klumph Gallery at RI World Headquarters.
- A gift of $1 million or more will be considered by the Trustees when such gift is intended to establish a new program.

An endowment can be funded all at once or over time, with gifts of:

- Cash
- Marketable securities
- Real estate
- Remainder interest in charitable trusts or annuities
- Life insurance
- Bequests

Please contact a Rotary Foundation staff member if you are interesting in discussing a named or endowed fund.

District Permanent Fund Chair

The Rotary Foundation District Permanent Fund Committee Chair will be appointed by the District Governor. The Chair will request that their District Governor, in consultation with them, appoint at least three additional Rotarians to serve as members with the Chair of the Permanent Fund District Committee. The following recommendations can be used as a guide to help train DPFCs.

District Permanent Fund Chair Duties

- Provide personal leadership toward achievement of district major gift goals.
- Attend the Foundation-sponsored training at a centralized location.
- Work with the district governor and district Rotary Foundation committee to establish club and district Benefactor and Bequest Society goals.
- Coordinate subcommittee activities to inform Rotarians of Planned Giving opportunities available in those countries that allow the donor to make a significant gift while receiving estate and/or income tax deductions and under some arrangements, a life income interest as well.
- Coordinate activities of subcommittee members to work with club presidents to recognize current Benefactors and Bequest Society members when programs on the Foundation are scheduled.
- Coordinate promotional and solicitation efforts concerning outright gifts to the Permanent Fund with the Annual Giving Subcommittee Chair.
- Coordinate the identification, cultivation and solicitation of potential donors of major outright gifts or planning gifts in support of the Foundation's Permanent Fund. Involve district leadership, RRFCs, trustees and directors, alumni, and Major Donors in the planning and solicitation of major gift prospects, as appropriate.
- Utilize the regional Rotary Foundation coordinator, Annual Programs Fund strategic adviser, and Major Gifts adviser for support in carrying out subcommittee responsibilities.
- Work with club and district officers to ensure the full utilization of all DDF.
- Coordinate with DG and/or DRFC at least two major gift seminars and additional cultivation events for invited Rotarians and other potential donors each year.

District Permanent Fund Chair Goals

- Lead by example by making a gift to The Rotary Foundation.
- Establish the importance of the major gifts process with the key district leaders (DG, DGE, other prominent Rotarians in the district).
- Make a personal bequest commitment to the Permanent Fund.
- Establish and utilize a well trained, working committee.
- Make three solicitations per quarter.
- Cultivate major gift prospects on an ongoing basis.
- Promote the Benefactor program and the "Two Needs, Two Ways" message at the club level.
- Communicate with the Major Gifts Adviser at least once a month.
- Focus on identification, cultivation and solicitation of major gifts, not simply major donors.

District Permanent Fund Committee Goals and Objectives

- Assemble your committee to review the status of prospects in your district on a quarterly basis (July, October, January, April).
- Invite the District Governor, District Governor-elect, District Governor-nominee, Major Gifts Adviser, District Rotary Foundation Chair, Annual Giving Subcommittee Chair and any other key players in the district to this meeting.

At this meeting:
- Organize the work of your committee.
- Review the success of the district's major gift giving in the past and current year.
- Rank and prioritize your district's prospects: request a Permanent Fund Prospect Evaluation Grid from your Major Gifts adviser. Review list of Paul Harris Society members, past Major Donors, Bequest Society Members and Benefactors. Discuss these potential prospects with your team. Seek additional feedback from Club Foundation Chairs and your contact at The Rotary Foundation.
- Based on your initial discussion and ranking, choose three prospects for solicitation in each quarter. Start the year with your most likely prospects, and save those needing additional cultivation for a later date. Submit an "Initial Donor Prospect Form" to your Major Gifts adviser for each prospect.
- Develop solicitation strategies for each prospect. Assign a team of committee members to organize the initial meetings as well as the solicitation meeting. Identify the most appropriate individual to solicit each prospect.
- Assign a committee member to schedule and organize a major donor recognition/cultivation event at the district conference or at another appropriate time for the district.
- Plan district recognition or cultivation events (meetings, Foundation dinners, holiday cultivation event, etc.). Assign a committee member to organize each event.

Calendar of suggested activity

Initial Preparation and Responsibilities – (before July)
- Contact the last District Permanent Fund Chair to debrief and share information regarding planning, ongoing solicitations and prospects.
- Meet to communicate the priority of major giving with your District Governor, District Governor-elect, District Rotary Foundation Chair and other key district leaders.
- Establish your committee. Possible additional committee members are past District Governors, past District Permanent Fund Chairs, Assistant District Governors or past Assistant District Governors, major donors, tax professionals, fund-raising professionals, lawyers, estate planning professionals in the district. Include your District Governor and District Governor-elect in all plans and correspondence.
- Work with DGE and DRFC to encourage clubs to fill-out the Major Donor, Bequest Society and Benefactor goals on the Fund Development Club Goal Form as well.
- Attend training led by Major Gifts adviser.
- Contact your TRF Major Gifts Officer to introduce yourself and maintain an open line of communication, becoming familiar with the resources available to you through TRF.
- Request Major Donor and Bequest Society Member report for your district from TRF. Review list of Paul Harris Society members as provided by your district's Paul Harris Society Coordinator. Review Club Recognition Summary Reports to identify current Benefactors and identify likely candidates who may consider becoming Benefactors. Cross-reference these lists to begin the initial prospecting process.
- Become familiar with TRF forms (Benefactor Commitment Card 149-EN, Bequest Society Membership Card 098-EN) and applicable recognition materials.

On-going Communication Responsibilities

- Establish a regular form of contact and information exchange with your Major Gifts adviser for your Zone and your Major Gift Officer or staff representative at The Rotary Foundation.
- Report on all meetings and contact your Major Gifts Adviser to submit updates on cultivation and solicitation activities and prospect's interests.
- Contact each club in your district. Inquire as to any recent donor activity within the club and ask the club contact to assist you in identifying major gift prospects. Review list of high-level Paul Harris Fellows and Paul Harris Society members with club foundation chairs to identify potential significant supporters.
- Share the names of those who requested information from The Rotary Foundation's *Vision*s newsletter, mailing, where applicable, as sources for new prospects with your team, your Major Gifts Advisers and the Planned Giving Officer.

Year-End Opportunities & Responsibilities

- Maximize year end giving opportunities by helping complete any solicitations of prospects that may want to make their gift by 31 December for tax reasons, where applicable.
- Recognize Rotary calendar giving opportunities by following up with and assisting any donors that might want to complete a gift by Rotary year-end.
- In consultation with your District Governor, District Governor-elect and District Governor-nominee, examine the effectiveness of your committee and make any changes of personnel necessary for the next Rotary year.

District and Club Presentations

- In consultation with your District Governor, District Rotary Foundation Chair and each club president, schedule club presentations, highlighting the Benefactor program and "Two Needs, Two Ways of Giving."
- Contact your Major Gift Officer for presentation materials, if needed.
- Expand on the idea of *Every Rotarian, Every Year* with regards to the Permanent Fund – becoming a Benefactor is easy: encourage every Rotarian to become a Benefactor during your club presentation.
- Contact the program chairman of your district conference to get on the agenda to present information and updates regarding the Permanent Fund.
- Have each member of the committee schedule a minimum of three club presentations during November, Foundation month.
- Order publications necessary for cultivation efforts at http://shop.rotary.org.
- Regularly review the success of your club presentations.

Action Steps

- Become familiar with the Rotary Centers program.
- Identify a Permanent Fund Committee Chair in each district. Ensure that the Permanent Fund committee has a Rotary Centers Subcommittee Chair.
- Formally train and DPFCs in your assigned districts.
- Work with your districts to identify potential Rotary Centers prospects.
- Share the Permanent Fund Chair description and calendar of activities with each district's Permanent Fund Subcommittee Chair, assist them in developing a plan to help promote the Rotary Foundation Permanent Fund at the club and district level.
- Ensure that Permanent Fund subcommittee members are familiar with Rotary Foundation literature on Planned Giving.

Rotary Alumni Relations

Rotary Foundation Alumni FAQs

Q: What is the purpose of Rotary Foundation alumni relations?
A: To create a lifelong relationship between Rotary and its alumni

Q: Who are Rotary Foundation alumni?
A: Foundation alumni are former
- Ambassadorial Scholars
- GSE team members & leaders
- Grant for University Teachers recipients
- Rotary World Peace Fellows
- Rotary Peace and Conflict Studies Program participants
- Rotary Volunteers that have received Foundation grants, such as Discovery Grants, Individual Grants, and Volunteer Service Grants

Q: Why is it important to keep Foundation alumni connected with Rotary?
A: Foundation alumni are important because
- They are part of the Rotary family, having benefited from Foundation programs.
- They are great resources for promoting Foundation programs and Rotary.
- They are a source of potential donations to the Foundation.
- They are a source of potential Rotarians.

Q: How many Rotary Foundation alumni are there?
A: There are approximately
- 57,000 GSE alumni
- 38,000 scholar alumni
- 5,000 Rotary Volunteer
- Over 100,000 total Rotary Foundation alumni

Q: How many Foundation alumni are Rotarians?
A: Only approximately 16,000 Rotarians are Foundation alumni. The majority of these are Rotary Volunteers and GSE team leaders.

Q: What can districts and clubs do to involve Rotary Foundation alumni in their activities?
A: Districts and clubs can:
- Encourage alumni to form or join existing alumni associations.
- Invite alumni to serve on selection committees for GSE teams, Ambassadorial Scholars, and Rotary World Peace Fellows.
- Encourage and invite alumni to participate in regional orientation seminars.
- Ask alumni to work on club and district service projects.
- Extend invitations to alumni to present at club and district events, including the district conference.

Q: What else can districts and clubs improve alumni relations efforts?
A: Make an effort to include alumni in all your district and club activities!

Q: Who are Rotary Foundation alumni coordinators?
A: Rotary Foundation alumni coordinators (RFACs) are zone representatives responsible for working with alumni chairs to encourage clubs and districts to
- Involve alumni in their activities.
- Remember that alumni are potential club members and donors.
- Use alumni as effective advocates for Foundation programs.

For further information please email alumni@rotary.org.

Recruiting and Retaining Alumni

Rotary Foundation alumni are ideal for Rotary club membership due to their familiarity and interest in Rotary's ideals and mission. They were already selected by clubs and districts to serve as international Rotary ambassadors and often these same characteristics make them excellent potential Rotarians.

- Induct several alumni into your club at once, instead of recruiting them one at a time. If your club has no alumni members, inducting several at the same time gives these new members an immediate peer group in the club.
- Conduct service projects that are likely to appeal to younger members. The Australian Bureau of Statistics found that volunteers in two age groups, 25-35 and 55-65, do the same amount of service work. But the younger volunteers were more likely to focus on areas such as education, sports, and family matters.
- Consider lowering the total cost of membership in your club. Some younger members have trouble meeting the financial obligations of club membership. To combat this problem, considering lowering your fees or have a discounted meal cost for recent alumni.
- Make sure meetings are efficient and productive. Younger members, who often have competing priorities, are more interested in attending meetings that are conducted efficiently. Also, make sure your club has an appropriate balance of meetings and hands-on projects and activities.
- Recruit "up-and-comers." Managers who are on their way to becoming important business and professional leaders are often interested in the networking and professional development benefits of Rotary. Getting them invested in Rotary while young can help ensure their dedication to Rotary when they reach top-level management, executive status, or ownership positions.
- Be open to the new ideas of younger members. Maintaining the status quo in your club may bore and discourage them. Younger members will be more likely to stay in your club if their opinions are valued and appreciated — and if they aren't treated like junior members.

How to bring a Rotary Foundation program alumni back to Rotary: a Four-Step example

Recently I experienced success in helping bring a long lost Rotary Foundation program alumnus into Rotary. I would like to share my 4-step process as an example of how Rotarians can facilitate alumni membership in Rotary.

Step 1: Research
As Educational Programs Division Manager of The Rotary Foundation, I was asked to deliver a speech to the Rotary Club of DeKalb in June 2005. I accepted the invitation, but with the understanding that a local TRF program alumnus would join me. With research supported by the Alumni Relations staff at The Rotary Foundation, I located Professor James I. Miller, retired chair of the local university's English Department. Jim had served as an Ambassadorial Scholar in England in 1952-53 and still worked at Northern Illinois University in DeKalb.

Step 2: Reconnect
Jim had fallen out of touch with his former sponsor and host Rotary clubs and had not visited any Rotary clubs in many years. He had lived in several countries since leaving his hometown in Oklahoma over 50 years ago. By inviting this scholar alumnus to visit the Rotary Club of DeKalb, I reconnected him with Rotary. In fact, he was pleased to have the opportunity to once again

become acquainted with a Rotary club, and turned out to know many of the Rotarians at the meeting.

Step 3: Involve
Although I encouraged the Rotary Club of DeKalb to consider Jim for membership, it was ultimately not practical for him to join this club. He is in town only once a week for his work at the university and now resides over 120 miles away in Southeastern Wisconsin. However, I looked for additional opportunities to involve him in Rotary in a meaningful way. In November 2005, I invited him to share with the Educational Programs staff in Evanston his experience as an Ambassadorial Scholar in postwar Europe at the University of Oxford.

Step 4: Invite
When I was asked to participate in a focus group called by the Rotary Club of Milwaukee's Scholarships Committee in January 2006, I saw the chance to introduce Jim to the club, located just 14 miles from his residence. I suggested to the Rotary Club of Milwaukee that they invite Jim to an upcoming club meeting, as he was a prime candidate for membership due to his experience as an Ambassadorial Scholar and distinguished career in academia. The club agreed, and coincidentally the Rotarian in the club who proposed Jim for membership was a former Rhodes Scholar enrolled at Oxford at the same time as he was! In March 2006, James Miller became a Rotarian, continuing a relationship with Rotary started five decades ago.

James I. Miller
Ambassadorial
Scholar
1952-53

James I. Miller
Rotarian
2006 - today

By Harvey Newcomb III
Member, Rotary Club of Evanston Lighthouse, District 6440
1990-91 Ambassadorial Scholar to Universität Wien

District Alumni Subcommittee

Chair Responsibilities

- Develop and maintain a directory or database that is complete and accurate and notify The Rotary Foundation of any updates made.
- Organize and direct the nomination process for candidates for the Global Alumni Service to Humanity Award for district endorsement and submission to The Rotary Foundation.
- Regularly hold reunions and activities for alumni residing in the district.
- Work with the annual giving and major gift subcommittees to encourage alumni to make financial contributions to The Rotary Foundation.
- Look to the regional Rotary Foundation coordinator and the Rotary Foundation alumni coordinator for the zone for support in carrying out responsibilities.
- Devote special attention to communication with Rotary World Peace Fellows, including them in district publications and events and inviting them to speak and meetings and district conferences.
- Ensure that Rotary World Peace Fellow alumni refer candidates for the fellowship to the district's Rotary World Peace Fellowships subcommittee and that at least one fellow alumnus serves as an adviser to the Rotary World Peace Fellowships subcommittee.
- Work with the other subcommittee chairs to determine distribution and usage of the district's District Designated Fund.
- Provide a year-end report to the district's Rotary Foundation chair with specific details describing how the above goals were met.

Subcommittee Responsibilities

- Support the subcommittee chair in the organization of alumni reunions and activities.
- With the help of the subcommittee chair, make certain that all Rotary Foundation alumni fulfill their requirements upon returning to the district.
- Assist the subcommittee chair in recruiting alumni to be involved in inbound/outbound scholar and GSE team orientations.
- With the guidance of the subcommittee chair, establish and maintain a district alumni association and submit an application for charter to The Rotary Foundation.
- With the direction of the subcommittee chair, encourage alumni to remain involved with Rotary through membership, by identifying future program participants or participating in Rotary club community and World Community Service projects.
- Emphasize the importance of clubs using www.rotary.org to obtain up-to-date information.
- Attend all meetings called by the subcommittee chair.
- Participate in the nomination process, with the assistance of the subcommittee chair, for candidates for the Global Alumni Service to Humanity Award for district endorsement and submission to The Rotary Foundation.
- In collaboration with the subcommittee chair, encourage alumni to make financial contributions to the Rotary Foundation.

District Alumni Association FAQs

Q: What is a district Rotary Foundation alumni association?
A: An active organization of former Rotary World Peace Fellows, Ambassadorial Scholars, Group Study Exchange team leaders and members, and other Rotary Foundation program participants. Such district associations are growing throughout the world and are commonly referred to as Rotary Foundation alumni associations.

Q: What are the purposes of an alumni association?
A: There are five main purposes:
- To establish and maintain a common bond among Rotary Foundation alumni
- To provide a connection enabling alumni to network with one another and with Rotarians
- To link the vocational interests of alumni with similar interests of Rotarians and other alumni
- To provide opportunities for involvement in Rotary educational and humanitarian service projects
- To facilitate membership in Rotary clubs, including e-clubs

Q: How do members of an alumni association meet and communicate?
A: Members of an alumni association meet as often as decided by the members. They communicate between meetings through the Internet and other available methods.

Q: How often do the members of an alumni association meet in person?
A: The times and places of all meetings are determined by the members. However, it is strongly recommended that an annual meeting take place in conjunction with the local district conference.

Q: What are some of the benefits of joining an alumni association?
A: There are countless opportunities, in addition to gaining friendships. They include:
- Networking with leaders in all professions who share a Rotary experience
- Direct business and professional opportunities
- Serving on district Rotary Foundation selection committees for Rotary World Peace Fellows, Ambassadorial Scholars, and GSE teams
- Serving as a mentors to other Rotary Foundation program participants
- Speaking at Rotary club meetings and district events
- Participating in international and local service projects

Q: What are the dues or costs involved with membership in an alumni association?
A: None, unless the association itself decides to establish a nominal fee for specific purposes.

Q: Are members of an alumni association required to contribute to The Rotary Foundation?
A: No, alumni are not required to make contributions to the Foundation. However, contributions of any amount, particularly annual contributions, are always encouraged, welcomed and appreciated!

Q: How many members can form an alumni association and what is its structure?
A: There is no minimum number of members to form an alumni association, although practice has shown a good starting number is 15 members. Each alumni association elects its own officers. The president of the alumni association serves as a liaison to the district governor and district Rotary Foundation committee. Sample alumni association by-laws and other support are available from The Rotary Foundation Alumni Relations staff.

Q. What is the Worldwide Rotary Foundation Alumni Association?
A. The Worldwide Rotary Foundation Alumni Association is a new group within the Rotary family that seeks to keep all Foundation alumni connected to Rotary. The inaugural international meeting of this new worldwide association will be held in conjunction with the 2008 RI Convention in Los Angeles on 14 June, 2008. All Rotary Foundation alumni are invited and encouraged to attend. The goal is to have at least one scholar alumnus and one GSE alumnus from every Rotary district in the world attend and participate!

Foundation Alumni Report List Key

Column	Heading	Description
G	DRes	Residing district: where the alumnus/alumna currently lives or resides
J	MarStat	Marital status: married, divorced, etc., this field is usually blank
L	Comment	Notes about special awards, interests, activities
M	Distinguished	Indicates if the alumnus/alumna has achieved career or humanitarian distinction on an international basis
S	ResAdd1	Residential address: the alumnus/alumna's home
Z	BusAdd1	Business address: the alumnus/alumna's business or workplace address
AK	Lost	A letter 'L' appearing in this column indicates international postal systems have returned mail as undeliverable; the alumna/alumnus is considered temporarily lost
AL	Program Type	**S**: Scholar (Ambassadorial Scholar, Rotary World Peace Fellow, or University Teacher); **G**: Group Study Exchange participant; **V**: Rotary Volunteer (Volunteer Service Grant recipient)
AO	Institute/Status	Indicates which institution a scholar attended, GSE team member or leader, or in what type of volunteer grant or project the alumnus/alumna participated
AP	Study/Service Type	Indicates field or subject of study for scholars or volunteer project description, this is usually blank for GSE
AQ	Award	Indicates the specific type of award received, including: **GS**: Graduate Scholar, **UGS & US**: Undergraduate Scholar, **AY**: Academic-Year Scholar, **M2** or **M3**: Multi-Year Scholar (2 or 3 years), **C3** & **C6**: Cultural Scholar (3 or 6 months), **PS** or **RWPF**: Rotary World Peace Fellow, **UT**: University Teacher Grant recipient, **GSE** team leader or member, **VOL**: Volunteer

Global Alumni Service to Humanity Award

The purpose of the Global Alumni Service to Humanity Award is to honor an outstanding former Foundation program participant and to help publicize the social benefits of the Foundation's programs. The award is intended to celebrate a Foundation alumnus or alumna whose extraordinary service activities and professional achievements exemplify the Rotary ideal of Service Above Self.

Zone committees choose regional alumni award winners. The Trustees of The Rotary Foundation then select a global winner from among the zone winners. The global winner is honored at the annual Rotary International Convention.

The award is open to all eligible Foundation alumni: former Ambassadorial Scholars, Group Study Exchange team leaders and members, and recipients of Grants for Rotary Volunteers, Grants for University Teachers, Individual Grants, or Discovery Grants.

Eligibility

- Candidates must have fulfilled all the appropriate program requirements.
- Candidates must have completed their program participation at least 10 years earlier.
- The global winner must accept the award in person at the RI Convention, the award will not be presented posthumously.
- An individual may receive the award only once.

Criteria

- Candidates must have provided outstanding service to mankind and must have achieved the highest degree of distinction in their profession or vocation.
- Candidates must have served as global citizens impacting the international scene. The ideal candidate's service and professional career must go beyond the local community to touch the lives of people at the national or international level.

Nomination Guidelines

- Rotary districts are eligible to nominate one candidate; the candidate can reside or have studied or served in any Rotary district.
- Eligible nominators are past trustees, current district governors, alumni subcommittee chairs, Rotary Foundation alumni coordinators, and regional Rotary Foundation coordinators.
- All nominations must be endorsed by the current district governor.
- Nominations must include a clear description of the candidate's achievements that would qualify him or her for this award; supplementary documentation or material is highly desirable.
- A complete nomination will include the Nomination Form, a résumé or curriculum vitae, a detailed description of the individual's service achievements, and a digital or print photograph of the candidate.

Deadline

- Zone committees will set their own deadlines. Nominations should be sent to the zone committees, chaired by the regional Rotary Foundation coordinator serving your area.
- All nominations should be submitted to your zone alumni award committee.

Action Steps

- Ensure that each district has a working Foundation Alumni Subcommittee in place.

- Facilitate that each district has an up-to-date list of alumni residing in the district (obtain a copy of the list by emailing alumni@rotary.org).
- Help districts develop a model that ensures regular contact with their alumni.
- Develop a database of potential district alumni speakers to be available for club and district presentations.
- Work with districts to include alumni in appropriate district events for cultivation and recruitment purposes.
- Encourage districts to host regular alumni only events.
- If eligible, ensure that your zone participates in the Global Alumni Service to Humanity Award nomination process.

Zone Strategic Action Plan

The following pages are intended to help you capture the outcomes of the strategic planning discussion at Zone Team Training.

Every Rotarian, Every Year

Goal Setting	
Developing Paul Harris Societies, enhancing reoccurring annual gifts	

Working with challenging clubs (large clubs, non-contributing clubs)	
Promoting TRF support	

Major Gifts

Major Gift Development training for Rotary districts	
Identifying major gift prospects, managing major gift prospects	

Identifying and approaching Rotary Centers prospects	
Major Gift events	

Planned Giving

Develop a Planned Giving fundraising strategy for your districts	
Planned Giving and Permanent Fund Training	

Permanent Fund

Working with Permanent Fund subcommittee chairs	
Promoting Benefactors and Bequest Societies	

Rotary Foundation Alumni

Working with the alumni subcommittee	
District alumni events	

Promoting TRF through Foundation alumni

Other

Travel and Reimbursement Guide

Travel Reimbursement Tips

The Rotary Foundation will provide you with a limited budget depending on the number of districts you are responsible for to help cover the reasonable costs of your travel, meals, hotel, and other miscellaneous expenses during the 2008-2009 Rotary year when conducting Foundation business. You will be advised of your budget amount after your districts have been assigned to you.

To ensure that you receive timely reimbursements for your expenses, it is critical that you comply with the enclosed Rotary Volunteer Travel Policy (updated November 2006) and complete the Expense Report Forms as required. Following the tips outlined below can help expedite as well as eliminate delays in processing your reimbursements:

- Review Rotary's Volunteer Travel Policy. **All airline travel must be booked through RITS, no exceptions.** For all ground travel estimated to cost US$250 or more round trip, you must receive advance travel approval from RITS or your travel costs may not be reimbursed. When making reservations through RITS, please provide your airline and hotel customer identification numbers so that you can participate in the various rewards programs. Please note that according to IRS regulations, you must turn in mileage expenses for your ground travel. Reimbursements for gasoline expenses in lieu of mileage are subject to the approval of Foundation management.
- **Retain receipts** for all of your expenses in performance of your volunteer duties. While you need only submit receipts for expense amounts of US$75 or more, it is always a good practice to save your receipts to substantiate expenses. Credit card statements and bank statements are not acceptable as proof of payment. All receipts must show proof of payment and or carry a zero balance.
- Complete your Expense Report Forms with accuracy, sign the form, attach receipts, and keep a copy for your records. You must include names or the number of people present at the meeting where you presented.
- **Submit your Expense Report Forms within 60 days of travel.** Mail your Forms to the right place.

  The Rotary Foundation – FN500
  1560 Sherman Avenue
  Evanston, IL 60201-3698

- Expense Reports not requiring receipts can be faxed to: 847-328-5260
- You will be notified by email of changes to Rotary's travel policy, exchange rates or mileage rates. Questions can be directed to your Annual Giving staff or the EREY Hotline at: 847-866-3352.

Rotary International Volunteer Travel and Expense Reporting Policy

Purpose
The mission of the Rotary International Travel Service (RITS) is to provide safe, cost-effective travel services to Rotary funded travelers.

General Policies

- Travelers are expected to follow travel policy guidelines which are designed to conserve the funds of the organization while providing reasonable comfort and meeting the travelers basic needs.
- Only properly authorized travel expenses in the service of Rotary International or its Foundation will be paid for or reimbursed. Non-funded travel arrangements are the responsibility of the individual traveler.
- All funded travelers must submit a travel request form to the appropriate RITS designated agency.
- Travelers will use preferred airlines that provide discounts to Rotary International and its Foundation.
- Persons traveling at the expense of Rotary International or its Foundation may secure their own travel medical and accident insurance. Rotary senior leaders traveling on Rotary business, committee, task force or resource group members traveling on funded Rotary business, and past senior leaders traveling at the request of the president or the trustee chairman are provided travel insurance by Rotary International.
- Travelers will accept flights with up to one additional connection if considerable cost savings can be achieved.
- Flights will be booked through the most economical airports provided the cost of ground transportation does not increase the total cost of travel nor substantially increase traveling time to and from the airports.
- Travel times will be booked within two hours of the time requested by the traveler.
- All travel arrangements funded by Rotary International and its Foundation are to be handled by the appropriate RITS-designated travel agency. Travelers are encouraged to submit requests for local purchase authorization if they believe they can purchase a lower cost airfare through a non RITS-designated travel agency. The local purchase authorization request must include an official travel itinerary, which indicates flight numbers, flight times, airline and airfare. The traveler will only be authorized for local purchase if the airfare provided by the non RITS-designated agency is at least US$100.00 lower than the RITS airfare. RITS reserves the right to deny local purchase requests based on its evaluation of the routing, seat availability, and airline selected by the non-RITS agency. The traveler will be reimbursed for the authorized amount upon completion of the trip and submission of the applicable receipts, along with an official Rotary International Expense Statement.
- Travelers arriving for official meetings may arrive one day prior to the first meeting date. Travelers arriving from destinations 4000km. (2500 miles) and further may arrive two days prior to the first meeting date if their RITS scheduled flight cannot arrive before 15:00 hours the day before the meeting is scheduled to begin. Committee chairmen may arrive two days prior to the first meeting date. Past Presidents traveling more than 4000km. (2500 miles) may arrive one day prior to the general arriving date for the Council on Legislation, International Assembly and International Convention, unless they are otherwise required to arrive earlier in respect of any other meeting. Lodging, meal and general expense costs of travelers arriving within these timeframes will be the responsibility of Rotary

International. Travelers arriving earlier than these guidelines or staying longer than the night of their last meeting will do so at their own expense. If a committee meeting ends on Friday and there is considerable saving on airfares by staying over Saturday, the Saturday night lodging, meal and general expense costs will be paid by Rotary International. The same rule would apply to a Saturday arrival for meetings beginning on Monday. (This does not apply to travel to the International Assembly, International Convention, and Council on Legislation as travel policy may be modified to best meet the objectives of those meeting.)

- Travel by transportation other than commercial aircraft must be authorized and will be reimbursed provided the cost does not exceed the amount of a RITS calculated round-trip airfare.
- If air service is unavailable, travelers will be reimbursed for the cost of the Rotary-authorized most economical alternate form of transportation (i.e. personal automobile, train, bus, ferry). If anticipated travel costs exceed US$250, RITS authorization is required.
- Authorized travel by personal automobile will be reimbursed for the actual distance driven, on a per mile/kilometer basis as predetermined annually by Rotary International on a country-by-country basis. This mileage rate accounts for fuel costs; therefore, fuel may not be expensed in addition to the mileage.
- Approved travel by rental car will be authorized for intermediate or smaller size cars. Rotary will not reimburse Collision Damage Waiver or Personal Accident Insurance on rental cars.
- Travelers will receive reimbursement in an amount up to the class of service for which they are eligible.
- Travelers will pay the cost of any personal travel booked in conjunction with authorized Rotary International travel.
- Frequent flyer miles earned through tickets purchased by Rotary International will be credited to the account(s) of the individual traveler. Tickets used by redeeming miles are not reimbursable.
- Exceptions to travel policy may be applied for in writing to the General Secretary. Examples of exceptions that may not be applied for include:
    - The selection of specific airlines for frequent flyer benefits where Rotary has the opportunity to take advantage of lower fare or incentive programs on other airlines;
    - The selection of specific airlines where Rotary needs to fulfill its contractual commitments with its preferred airlines;
    - The selection of full economy/coach class fares (for the benefit of personal first or business class upgrades), where lower discount fares may be available; noting no change to the current travel policy for those entitled to business class where business class is not available.

Airline Class of Service

Funded Travelers will make use of the lowest available economy class airfare.

Guest Speakers and Award Recipients traveling at the expense of either Rotary International or its Foundation will travel at a class of service as authorized by the President of Rotary International or the Chairman of The Rotary Foundation Trustees, as appropriate.

Rotary Senior Leaders may make use of upgrades to the next class of service and may always elect to travel at a less expensive class of service for which they are eligible.

It is strongly recommended that Rotary Senior Leaders use coach class for all flights up to two hours in length and make use of upgrades on those flights to fly in either business class or first class. When doing so, Rotary Senior Leaders are to be reimbursed for the cost of upgrade coupons with those charges billed to airfare cost centers.

Note: Reimbursement is limited to eligible class of service as indicated below.

Business Class

- Rotary International Board of Directors
- Rotary Foundation Trustees
- President-nominee
- Past Presidents
- General Secretary
- Directors-elect in conjunction with the Rotary International Convention and subsequent Board meetings
- Incoming Trustees in conjunction with their preparation as a Trustee
- Aides to the President and President-elect
- Past Directors and Past Trustees (or lowest available upgradeable coach fare if business class is not offered)
- Spouses of the above when traveling with them at Rotary's expense

First Class

- President
- President-elect
- Past Presidents when business class is not offered
- Rotary Foundation Trustee Chairman
- Current Directors, Trustees and General Secretary when business class is not offered
- Spouses of the above when traveling with them at Rotary's expense

Reimbursement for Travel Expenses

- All requests for reimbursement of business expenses shall be submitted on a RI expense statement within 60 days of when the expenses were incurred. Expense statements received after 60 days will not be reimbursed unless authorized by the general secretary in exceptional cases where circumstances warrant such action.
- Travelers on Rotary International and its Foundation business are to submit receipts for all expenses in excess of US$75.00.
- If international travel connection time exceeds 7 daytime hours, Rotary will reimburse the traveler for the cost of a day room, based on actual receipts, provided that the room is booked by RITS.
- If international schedules require a forced overnight stay, Rotary will reimburse the actual hotel costs of a reasonably priced hotel room provided that it is booked by RITS.
- Reimbursement to travelers for locally purchased airline tickets authorized by RITS is to be processed upon submission of applicable receipts on an official Rotary International Expense Statement to the Finance Department or to the appropriate Rotary International Office or Fiscal Agent. The submission of the required documentation may not occur prior to the commencement of travel.
- Rotary will reimburse Rotary spouse travel expenses incurred for a bona fide business purpose for Rotary International. Amounts requested for spouse expense reimbursement must be substantiated with appropriate

documentation and by utilizing an RI "Document of Reimbursable Activities of Spouse" before they can be reimbursed through the appropriate cost center. For spouses accompanying Rotarians on multiple travel segments, spouse travel expenses will only be eligible for reimbursement if the spouse incurred those expenses while conducting official Rotary business on approved and funded Rotary assignments. These expenses will be billed to the cost center authorizing the spouse travel. Any additional costs for spouses accompanying Rotarians on multiple travel assignments beyond the spouse funded portion will be at the personal expense of the Rotarian.

- All reasonable expenses such as taxi fare, hotel shuttle buses, and parking fees will be reimbursed.
- The actual costs of moderately priced, standard hotel rooms and car rentals will be reimbursed at a cost level appropriate to the area, provided that they are booked by Rotary.
- The actual costs of meals will be reimbursed. If attendance at a hosted official meeting function is mandatory, Rotary International will not reimburse for the costs of any alternate food or beverage.
- Telephone, laundry and valet: reasonable telephone, laundry, dry cleaning, and/or valet expenses incurred while on RI business are reimbursable.
- Tickets issued by RITS provide limited accident and baggage insurance. The cost of additional insurance coverage is the responsibility of the traveler and will not be reimbursed by Rotary International.
- For all individuals traveling at RI expense, the General Secretary shall limit the use of master account billing procedures to the costs of the hotel room and tax only. All other business expenses will be reimbursed according to the standard reimbursement procedures.

Travel policy last updated: November 2006

RITS Procedural Guidelines

Volunteer Travel

- Staff liaison sends a RITS Notification form to the RITS department
- The RITS staff advises appropriate RITS affiliate of authorized travelers
- Staff liaison advises traveler they have been authorized to travel and gives them cost center, account number, and project ID to be applied
- Traveler submits travel request form to appropriate RITS office

Travel Requests

Under normal circumstances, RITS travel requests will be addressed in the order they are received. However, RITS has the right to prioritize submissions based on time sensitive issues.

Local Purchases

The RI Travel Policy encourages travelers to submit requests for local purchase authorization if they believe they can purchase a lower cost airfare through a non-RITS designated travel agency. The local purchase authorization request must include an official travel itinerary, which indicates flight numbers, flight times, airline and airfare. The traveler will only be authorized for local purchase if RITS can verify space on an approved airline and the airfare provided by the non-RITS designated agency is at least US$100 lower than the RITS airfare.

Driving
If air service is not available and the costs are estimated to exceed US$250 prior RITS approval is required. For those choosing not to travel by air, reimbursement will not exceed the amount of a RITS calculated round-trip airfare or the actual distance driven, on a per mile/kilometer basis whichever is lower, provided prior RITS approval was received.

Cars and Hotels
All hotel and car reservations must be made by RITS. Except: Convention, International Assembly and meetings held in Evanston. Please refer to the Rotary International Volunteer Travel and Expense Reporting Policy for further details.

Guidelines for Preparing Expense Statements

This document serves as a guideline for the review and approval of a Rotary expense statement.

Business Purpose
- Each item listed on the statement needs to establish that it is within stated policy guidelines and has an acceptable business purpose. Descriptions such as ‘miscellaneous’ or ‘incidental’ do not establish the business purpose for the expense.
- Items requested for reimbursement outside policy guidelines must have the written approval of the general secretary before sent to Accounts Payable for processing.
- Examples:
  - “Transportation” could include: Automobile mileage to visit RC of Anchorage-100 km
  - “Meals” could include: Dinner with 3 club pres.; discussed membership retention

Supporting Documentation
- All required supporting documentation must be attached. Non-English documentation should be translated prior to submitting to Accounts Payable.
- Documentation is required for each reimbursement item US$ 75.00 and up for Volunteers.
- Hotel folio’s are needed regardless of dollar amounts, and must show proof of payment as hotel expenses are often paid by the local club or district. Hotel receipts must show a $0.00 outstanding balance.
- The traveler must have documentary evidence, such as a receipt, canceled check, credit card statement or a bill to support expense. Canceled checks, together with a bill from the payee, ordinarily establish cost; however, a canceled check by itself does not prove a business expense.
- A registration form alone does not provide proof of payment, and should include an on-line receipt, cancelled check or portion of credit card statement showing payment was made.
- Documentation for a group business meal should include the restaurant name and location, number of people served, and date and amount of the expense. The business relationship of all attendees must be documented.
- Although helpful, it is not required to list the individual names of the attendees.

Mileage and Exchange Rates

- Generally, the RI Exchange Rate should be used for expense requests in a foreign currency.
- Make sure the actual distance traveled and mileage rate are listed on the front of the expense statement and add it to the grand total.
- Mileage reimbursement to/from airport over US$100 requires prior RITS approval. Mileage reimbursement in lieu of airfare over US$250 roundtrip requires prior RITS approval. A RITS authorization letter must be attached to the expense statement prior to submitting it for processing.

IMPORTANT: All Rotary volunteer requests for reimbursement of business expenses shall be submitted on an official RI expense statement within 60 days of when the expenses were incurred. Volunteer expense statements received after 60 days will not be reimbursed unless authorized by the general secretary in exceptional cases where circumstances warrant such action.

Action Steps

- Additional travel information and forms are included on the resource CD-ROM. Become familiar with the expense forms and policies before planning your first trip.
- Please contact The Rotary Foundation if you have questions about travel and expense statements.

Appendix