

2011-12



EVERY
ROTARIAN
EVERY
YEAR

CLUB SUCCESS BOOKLET

Contents



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Every Rotarian, Every Year

Every Rotarian, Every Year aims to engage every Rotary club member in the life-changing programs of our Rotary Foundation. EREY strives to

- Encourage *every Rotarian* to participate in a Foundation program *every year*
- Encourage *every Rotarian* to personally contribute to the Foundation's Annual Programs Fund *every year*

With their volunteerism and generous philanthropy, Rotarians are at the heart of The Rotary Foundation's mission to eradicate polio and further Rotary's humanitarian and educational programs worldwide.

Financial support of the Annual Programs Fund (APF) from every Rotarian is the key to helping rebuild suffering communities and nations by resolving conflict, eradicating disease, providing safe water, feeding the hungry, educating children and adults, and alleviating poverty.

Every Rotarian, every project, and every contribution makes a difference **every year**.

Every Rotarian, Every Year Club Schedule

continued

The key to a successful year is being able to anticipate demands and deadlines. This planning will help lessen the stress of organizing big events and reaching certain goals.

Here are some important EREY actions to focus on in the coming months:

March–April: Contact your district governor-elect to discuss enhancing the Every Rotarian, Every Year effort in your club, specifically building your club Foundation team and setting fund development goals. Assign a club Foundation chair. Discuss upcoming district assembly and Foundation seminar schedules to maximize club member participation.

1 May: Submit your **Fund Development Club Goal Report Form** to your district governor-elect.

May–June: Confirm a date for the club visit by your incoming district governor. Arrange to have regular Rotary Foundation club programs featuring past and present district leadership, Ambassadorial Scholars, and Group Study Exchange participants, or highlight the success of a local District Simplified Grant or Matching Grant project. Build a group distribution list with contact information for all club members and leaders (name/address/phone/e-mail address).

June: Work with the outgoing club president to ensure a smooth transition; learn more about your club's giving trends, Major Donor prospects, fundraisers, and other Foundation projects.

July: Open each club meeting with a Rotary Foundation thought. Work with the district Foundation committee to identify prospects for lead gifts (major gifts, challenge gifts) to the APF and Permanent Fund. **Lead by example:** Make your own APF contribution toward achievement of your club's annual giving goal and annual Foundation club banner recognitions.

August: Begin planning for November Rotary Foundation Month activities. Begin monthly review of the Club Recognition Summary to ensure that member contributions are designated properly. Submit any corrections to gift designations within 90 days of the gift receipt date to the Foundation.

30 September: Assign your club Foundation chair to submit first quarter APF/EREY contributions to the appropriate RI office in order to reach 25 percent of the club's annual giving goal. Monitor your club's fundraising progress using the various contribution reports available on Member Access at www.rotary.org.

The Rotary Foundation of Rotary International
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Every Rotarian, Every Year

Club Schedule



October: Secure at least one challenge gift for the APF and Benefactor commitments to the Permanent Fund.

November (Rotary Foundation Month):

Effectively promote Foundation programs and financial support from Every Rotarian, Every Year. Promote any challenge gifts and The Rotary Foundation Sustaining Member program. Encourage your club to achieve recognition as an Every Rotarian, Every Year Club; a 100% Rotary Foundation Sustaining Member Club; or one of the Top Three Per Capita Giving Clubs during your year.

December: Work with your club Foundation chair to review the Monthly Contribution Report, Club Recognition Summary, and EREY Eligibility Report (all available in Member Access) for errors as well as progress toward the club's goal.

31 December: Assign your club Foundation chair to submit year-end contributions to the appropriate RI office in order to achieve 50 percent of your club's annual giving goal. If contributions receive tax benefits in your country, remind Rotarians to submit calendar year contributions before 31 December.

31 March: Achieve 75 percent of your annual giving goal. Assign your club Foundation chair to submit contributions to the appropriate RI office.

30 May: Ensure club goal achievement. Carefully monitor your club's fundraising progress using the various contribution reports available through Member Access. Any corrections to gift designations must be made within 90 days of the gift receipt date to the Foundation.

30 June: Achieve 100 percent of your annual giving goal. Submit contributions to the appropriate RI office before 30 June. Complete the final review of your club's contributions to ensure accuracy of gift designation.

Contributions to PolioPlus, Matching Grants, and the Permanent Fund do not count toward achievement of your Annual Programs Fund goal. All corrections must be submitted before the close of the Foundation's 30 June books (usually by 8 July).

Ongoing: Thank Major Donors, Paul Harris Society Members, Bequest Society Members, Benefactors, Paul Harris Fellows, and Rotary Foundation Sustaining Members at every opportunity. Average processing time for recognition is four to six weeks from receipt of application.

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Weekly Rotary Foundation Thoughts and Success Stories

continued

Educating Rotarians about the work of The Rotary Foundation (TRF) is one of the most effective tools for gaining and broadening support of our Annual Programs Fund and the Every Rotarian, Every Year effort. The Weekly Rotary Foundation Thought is designed to inform members of the many ways that Rotary does good in the world.

The club president can begin the tradition by opening each meeting with a brief moment on The Rotary Foundation, but consider rotating ownership of the weekly reading among club members. Here is a sampling of weekly thoughts.

Maternal and child health.

In Nepal, infant mortality is most severe in remote Himalayan villages, areas that are also in short supply of family planning services and economic opportunities. To address these needs, Rotarians have created an extensive training program to bring much-needed prenatal and postnatal services to 10 remote regions. The program is training 52 young women as professional auxiliary nurse midwives. The project, a collaboration between the Rotary clubs of Kathmandu Mid-Town and Darmstadt-Bergstrasse, Germany, is supported by a US\$283,725 Health, Hunger and Humanity Grant from The Rotary Foundation.

Water and sanitation.

Two Rotarians met on Facebook, which resulted in 10 Rotary clubs in two countries completing a Rotary Foundation Matching Grant. Rotary clubs in India and the United States joined in a Matching Grant to install water purification systems in eight schools, benefiting almost 6,000 students. Grant funds were used to purchase and install the water purifiers in each school. This project provides clean water to the students, many of them with no previous access to clean water, resulting in fewer cases of waterborne illnesses. Rotarians have seen the students' interest in learning and school attendance improve, as well as their sense of self-worth. "This is one of the many examples of how the Foundation's Humanitarian Grants Program can make positive changes for children," said Rotarian Helene Bo Morse.

The Rotary Foundation of Rotary International
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Weekly Rotary Foundation Thoughts and Success Stories

Peace and conflict prevention/resolution.

Through the Rotary Peace Centers program, The Rotary Foundation and Rotarians can increase their effectiveness in promoting greater tolerance and cooperation among peoples, leading to world understanding and peace. Archbishop Emeritus and Nobel Peace Prize laureate Desmond Tutu says: “Rotary Peace Fellows believe, and I believe, it is possible to have a world without war. It is possible to have a world without hunger.”

Economic and community development.

Even a small club can make a big difference when participating in a Matching Grant. While members of the Rotary Club of Marana in District 5500 were traveling in Zimbabwe, they met a man who was obviously hungry. These Rotarians worked with the Rotary Club of Victoria Falls and The Rotary Foundation to create a food garden that feeds an entire village and is self-sustaining for future generations. The Marana club has worked on projects throughout Africa, South and Central America, India, and the United States to improve the quality of life for those in need. Rotarian Randy Brooks says: “It truly is amazing how our small club contributions translate into opportunity for those in need of help. It is hard to not be overly proud of Rotary, its members, and The Rotary Foundation.”

Disease prevention and treatment.

Jehovah Jireh Haven for Destitute Children is an orphanage in Port Alfred, South Africa, which was home to 57 AIDS orphans living in four small rooms. The orphanage had one small bathroom and no clean water. Because of a Rotary Foundation Matching Grant, the children at Jehovah Jireh now have hope. New beds, more commodes and showers, playground equipment, a commercial washing machine, and new kitchen equipment were added. Additionally, a greenhouse for growing their own vegetables was built. Bring hope to a child: Make your annual gift today.



Basic education and literacy.

The work of the Immanuel Home in Debrecen, Hungary, deeply touched David Hare when he visited the daycare school for 75 severely disabled children in 2006. Hare spoke about the facility's needs to the members of his Rotary Club of Charlotte Top-of-the-Week, North Carolina, USA. The club responded by joining with the Rotary Club of Debrecen in a Rotary Foundation Matching Grant project that raised US\$14,000 to furnish and equip two new classrooms. Two years later, Hare learned of the need for a van to transport wheelchair-bound students from their homes to the school and outside activities. Ten Rotary clubs in districts 7680 (North Carolina, USA), 6910 (Georgia, USA), and 1911 (Hungary) and two churches joined in raising the \$67,000 needed, aided by a \$25,000 Matching Grant. Hare joined Debrecen club members to hand over the keys to the new nine-person wheelchair van to Immanuel Home administrators. Moreover, a favorable currency rate made it possible to purchase a second used van.

Visit www.rotary.org to access more Weekly Rotary Foundation Thoughts (keyword search: Foundation thoughts).

Success stories are also effective fundraising strategies that Rotarians use to inspire members to contribute to The Rotary Foundation. To learn more about the success stories in your area, check with your district leadership team and www.rotary.org.

The Rotary Foundation of Rotary International
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Your Annual Programs Fund

Using Member Access

Member Access at www.rotary.org offers Rotarians a variety of online services specific to their affiliation with Rotary International and The Rotary Foundation, including:

- Making Foundation contributions
- Viewing your contribution/recognition history
- Registering for RI meetings
- Searching the online *Official Directory*
- Managing your Rotary e-mail subscriptions
- Viewing secured sites

Rotary club and district officers have access to additional records and reports.

Rotary is committed to ensuring that your personal information remains confidential, and Member Access offers a secure, password-protected environment.

| | Club | | | |
|--|-------------------------------------|-------------------------------------|--|-------------------------------------|
| | President | Secretary | Rotary Foundation Committee Chair | Treasurer |
| Member Access | | | | |
| Contribute to TRF | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View your contribution history | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Search the online <i>Official Directory</i> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manage e-mail preferences | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Register for meetings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Daily Club Balance Report | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Pay semiannual dues or print semiannual report (SAR) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| View current semiannual reports (SARs) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View Club Recognition Summary (for own club only) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View MCR, <i>SHARE</i> , and Polio Reports | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View EREY Eligibility report | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Update Membership Data | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| View Membership Data | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Update Club Data | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Fund Development Club Goal Report Form* | <input checked="" type="checkbox"/> | | | |

* Only district governors and governors-elect can update the Fund Development Club Goal Report Form. DGs can update the form for the current year, and DGEs can update the form for the upcoming year.

If you have any questions, please call The Rotary Foundation's Contact Center at 866-9 ROTARY (866-976-8279) or e-mail contact.center@rotary.org.

Your Annual Programs Fund Using Member Access



1. Go to www.rotary.org and click “Member Access” on the upper right corner of the screen.

A screenshot of the Rotary International Member Access registration page. The page header includes the Rotary International logo and the text "ROTARY INTERNATIONAL THE ROTARY FOUNDATION". Below the header, the page is titled "Rotary Business Online" and features a photograph of a group of people. The main content area is divided into two columns. The left column contains text explaining the benefits of Member Access and a list of services that can be accessed, such as making TRF contributions and searching the online Official Directory. The right column contains a registration form with fields for "E-mail address" and "Password", a "REGISTER NOW" button, and a "Login" button. A checkbox labeled "Remember my e-mail address" is also present, along with a link for "What is this?".

Rotary Business Online

Registering with Rotary's Member Access allows you to access online services and features. To ensure your personal information remains confidential, many of our online services require you to log in to our secure environment with a unique email address and password. Once registered, you will have access to a variety of online services specific to your affiliation with Rotary International and The Rotary Foundation.

These services may include:

- Making TRF contributions
- Viewing your TRF contribution/recognition history
- Registering for RI Meetings
- Searching the online Official Directory
- Managing your Rotary email subscriptions

You must be registered in Member Access to login. Only the following groups may register: active Rotarians, Rotary Center Directors, Rotary World Peace Fellows and Rotary World Peace Fellow Alumni. If you are interested in Rotary International, The Rotary Foundation or any of Rotary's initiatives, please contact your local Rotary club for more information.

E-mail address: *I forgot my login e-mail address*

Password:

Remember my e-mail address *What is this?*

Login

REGISTER NOW

2. If you've already registered, sign in using your e-mail address and your password. If you're a first-time user, click the Register Now button to sign up and follow the onscreen instructions.
3. Once you've signed in, you'll see a list of options on the left side of the screen. For example, to make a contribution, click “Personalized Contribution Forms.”

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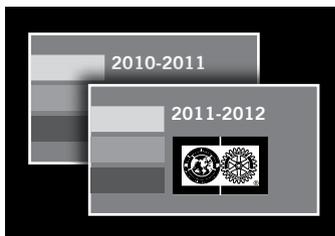
Appreciation and Recognition Opportunities

The Rotary Foundation welcomes a number of opportunities to show its appreciation to individuals and clubs for personal outright contributions supporting its humanitarian and educational programs.

Individual Recognition Opportunities

ROTARY FOUNDATION SUSTAINING MEMBER

A Rotary Foundation Sustaining Member is an individual who personally contributes US\$100 or more each year to the Annual Programs Fund. These contributions also count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition. Contact your Rotary club president to obtain the annual RFSM badge sticker in appreciation of this achievement.



PAUL HARRIS FELLOW

Paul Harris Fellow recognition is given in appreciation to anyone who contributes outright or cumulatively, or in whose name is contributed, a gift of US\$1,000 or more to the Annual Programs Fund, PolioPlus, or the Humanitarian Grants Program. The recognition consists of a certificate and pin. An optional medallion is available for \$15.



Annual Programs Fund – *SHARE*

Appreciation and Recognition Opportunities

CERTIFICATE OF APPRECIATION

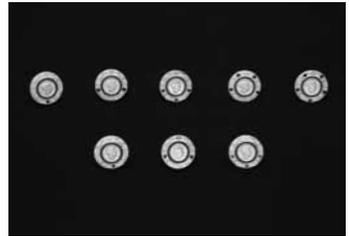
Occasionally, a donor contributes US\$1,000 and wishes to recognize a business or organization. In these instances, since Paul Harris Fellow recognition can only be presented to individuals, a Certificate of Appreciation is given instead.



MULTIPLE PAUL HARRIS FELLOW

Multiple Paul Harris Fellow recognition is extended at subsequent US\$1,000 levels (e.g., \$2,000, \$3,000). Recognition consists of a pin with additional stones corresponding to the recipient's recognition amount level.

- US\$2,000 to 2,999.99 – one sapphire
- 3,000 to 3,999.99 – two sapphires
- 4,000 to 4,999.99 – three sapphires
- 5,000 to 5,999.99 – four sapphires
- 6,000 to 6,999.99 – five sapphires
- 7,000 to 7,999.99 – one ruby
- 8,000 to 8,999.99 – two rubies
- 9,000 to 9,999.99 – three rubies



PAUL HARRIS SOCIETY

The Paul Harris Society is a district-administered recognition for those who elect to personally contribute US\$1,000 or more each year to the Annual Programs Fund, PolioPlus, or the Humanitarian Grants Program. Individual districts handle all associated recognition for this program, and inquiries should be directed accordingly. Paul Harris Society contributions are eligible toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition.



MAJOR DONOR

The Rotary Foundation recognizes those individuals or couples whose combined personal giving has reached US\$10,000, regardless of the gift designation. Major Donors may elect to receive a crystal recognition piece and pin and/or pendant commemorating the gift at each new recognition level.



- US\$10,000 to 24,999.99 – Level 1
- 25,000 to 49,999.99 – Level 2
- 50,000 to 99,999.99 – Level 3
- 100,000 to 249,999.99 – Level 4
- 250,000 to 499,999.99 – Level 5
- 500,000 to 999,999.99 – Level 6
- 1,000,000 and above – Level 7



Annual Programs Fund – *SHARE* Appreciation and Recognition Opportunities

ARCH C. KLUMPH SOCIETY

Donors who contribute US\$250,000 or more may have their photographs and a short profile shown in the Arch C. Klumph interactive display at Rotary International's World Headquarters in Evanston, Illinois, USA. Donors receive a special lapel pin and a certificate signed by the president of Rotary International and the chair of The Rotary Foundation, and they are invited to a special event at the annual RI Convention. The society is named in honor of The Rotary Foundation's founder, Arch C. Klumph.



Trustees' Circle – US\$250,000 to 499,999.99

Chair's Circle – 500,000 to 999,999.99

Foundation Circle – 1,000,000 and above

BENEFACTOR

A Benefactor is one who informs The Rotary Foundation in writing that he or she has made a provision in his/her estate plans for The Rotary Foundation or who makes an outright gift of US\$1,000 or more to the Permanent Fund. Benefactor recognition consists of a certificate and insignia to be worn with a Rotary pin.



BEQUEST SOCIETY

The Rotary Foundation recognizes individuals or couples who have made commitments in their estate plans totaling US\$10,000 or more. Donors may elect to receive an engraved crystal recognition piece and a Diamond Circle pin commemorating the commitment at each new recognition level.

- US\$10,000 to 24,999.99 – Level 1
- 25,000 to 49,999.99 – Level 2
- 50,000 to 99,999.99 – Level 3
- 100,000 to 249,999.99 – Level 4
- 250,000 to 499,999.99 – Level 5
- 500,000 to 999,999.99 – Level 6
- 1,000,000 and above – Level 7



Club Recognition Opportunities

EVERY ROTARIAN, EVERY YEAR CLUB

This banner is awarded to clubs that achieve a minimum US\$100 per capita and 100 percent participation with every active member contributing some amount to the Annual Programs Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year.



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Annual Programs Fund – *SHARE*

Appreciation and Recognition Opportunities



100% PAUL HARRIS FELLOW CLUB

To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time banner recognition is requested. The club's name is added to the all-time 100% Paul Harris Fellow Clubs list viewable on the RI website. This one-time-only banner recognition is awarded throughout the Rotary year.



100% ROTARY FOUNDATION SUSTAINING MEMBER CLUB

Every active member of the club must personally contribute US\$100 or more to the Annual Programs Fund during the Rotary year. This annual banner recognition is awarded at the conclusion of the Rotary year, and is based on active membership as of 30 June.



TOP THREE PER CAPITA IN APF GIVING

Banners are given to the top three per capita giving clubs in each district. To be eligible, clubs must achieve a minimum US\$50 per capita in *annual giving*. This banner recognition is awarded at the conclusion of each Rotary year.



For more information:

- Visit the RI website at www.rotary.org and click the About Us tab, then click "The Rotary Foundation."
- E-mail erey@rotary.org.
- Contact your district Rotary Foundation chair or district Annual Giving subcommittee chair.

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Your Annual Programs Fund

Frequently Asked Questions

continued

GENERAL QUESTIONS

What is EREY? How is it related to the Annual Programs Fund?

Every Rotarian, Every Year (EREY) is the fundraising vehicle for the Annual Programs Fund (APF). EREY encourages Rotarians to participate in Foundation programs and to support them financially with APF contributions.

Which programs are supported by APF contributions?

The Annual Programs Fund (APF) is the primary source of unrestricted support for The Rotary Foundation's humanitarian and educational programs, primarily Ambassadorial Scholarships, District Simplified Grants, Group Study Exchange, and Matching Grants. (Future Vision pilot districts: The fund supports Rotary Foundation Global Grants and District Grants).

What is *SHARE*?

The *SHARE* system is the mechanism for distributing Rotary Foundation program awards worldwide. All district Annual Programs Fund contributions are evenly divided into two categories: District Designated Fund (DDF) and World Fund. Contributions made in a given year will be eligible to be spent three years later. All club APF goals count toward the district's APF-*SHARE* goal.

GOAL SETTING

How does my club set its APF goal?

Each club president-elect is asked to submit the Fund Development Club Goal Report Form to the district governor-elect at the presidents-elect training seminar. The goal should be attainable yet challenging and represent an increase in giving from the previous year. Clubs are encouraged to meet or exceed the minimum US\$100 per capita goal.

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www.rotary.org

Your Annual Programs Fund

Frequently Asked Questions

When feasible, clubs are encouraged to submit collected contributions to The Rotary Foundation as they are received. Progress toward the goal may be monitored by viewing contribution reports available through Member Access at www.rotary.org.

Which contributions count toward our club's APF goal?

Only contributions designated to APF-SHARE count toward the club's APF goal. Contributions to PolioPlus, Matching Grants, Permanent Fund, or other restricted giving *do not* count toward the goal. (Future Vision pilot districts: Contributions to Rotary Foundation Global Grants do not count toward the goal.)

How are successful clubs raising money for the APF?

Some clubs promote recurring contributions to TRF by encouraging members to include a voluntary contribution with the regular club dues statement or by asking each member for a specific amount. (In the United States and Canada, TRF-DIRECT is a popular recurring gift option that encourages direct deductions from a checking or savings account or by credit card. This option will soon be available in Australia and elsewhere.) Other clubs that wish to promote fellowship among members hold fundraising events in support of TRF projects.

I need help with my club's monthly contributions, Paul Harris Fellow recognition, and corrections to my Club Recognition Summary. Who can assist me?

Your district Foundation chair or Annual Giving subcommittee chair can help. Foundation staff contact information is also available at www.rotary.org on the Contact Us page.

CONTRIBUTION

How do I make my gift?

Contributions to the Annual Programs Fund may be made in several ways: online through Member Access; by check, credit card, or wire transfer; or through your Rotary club. With all gifts, please use your membership ID number to ensure proper credit and recognition. For information on gifts of stocks, bonds, or mutual funds, please visit www.rotary.org and click “Contribute.”

Do any special forms need to be included with my gift?

The Rotary Foundation **Global Contribution Form (123)** is the standard form that individuals and clubs can use for contributions made to the Foundation. The **Recognition Transfer Request Form (102)** should only be used to transfer your Foundation recognition points.

For clubs submitting a single contribution on behalf of multiple donors, please complete the **Multiple Donor Form (094)**, which is available online through Member Access.

How can I find out what my cumulative giving is to The Rotary Foundation?

All Rotarians can access their personal contribution history in Member Access at www.rotary.org. You may also contact your district Rotary Foundation leaders or TRF staff representative for further assistance. TRF staff contact information is available at www.rotary.org on the Contact Us page.

Are my contributions to TRF credited to my Rotary club and district?

Yes. All gifts to the APF are credited to the individual donor and count toward the fund development goals of the donor’s Rotary club and district.

Your Annual Programs Fund

Frequently Asked Questions

We made our gift to the wrong TRF program. How do we change it?

Corrections to gift designations must be made within 90 days of the contribution receipt date within the same Rotary fiscal year. For example, a club submits a contribution to PolioPlus, but it was meant for the APF. The club has 90 days to request a reclassification of the contribution from PolioPlus to the APF. Your club should regularly review the Club Recognition Summary for any gift designation errors and report them immediately. For assistance, you may contact your district Rotary Foundation chair or Annual Giving subcommittee chair, e-mail erey@rotary.org, or contact the RI international office for your area.

Which reports provide information on my club's giving activity?

Club giving information appears on three reports:

Monthly Contribution Report

- District report that summarizes a club's year-to-date giving history
- Highlights annual, Permanent Fund, and restricted giving

Club Recognition Summary

- Recognition-based report
- Lists a club's all-time giving and individual recognition achievements
- Lists the date of the individual's last contribution and contribution designation

EREY Eligibility Report

- Identifies names of club members who personally contribute each year to the Annual Programs Fund
- Lists members contributing some amount to APF each year as EREY donors
- Lists members contributing US\$100 or more to APF each year as Rotary Foundation Sustaining Members
- Identifies members who contribute \$1,000 or more to APF each year as potential members of the Paul Harris Society (a district-administered recognition)

APF contributions count toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society (district administered), and Major Donor recognition and are applied toward a club's annual giving and banner recognition goals.

Club presidents, secretaries, treasurers, and Foundation chairs can view these reports (in PDF format) in Member Access.

Is The Rotary Foundation eligible to receive corporate matching gifts from my employer?

The Rotary Foundation is recognized as a 501(c)(3) charity in the United States and may be eligible to receive corporate matching gifts from your employer. Many international companies also match TRF contributions from employees who work in different countries. Ask your Human Resources department whether your gift can be matched and, if so, request the required corporate matching gift forms.

Can I contribute to the Foundation through my workplace giving campaign?

Many employers encourage their employees to contribute to charities through payroll deduction. Ask your Human Resources department whether your employer participates in a workplace giving campaign.

RECOGNITION/APPRECIATION

What is a Rotary Foundation Sustaining Member?

A Rotary Foundation Sustaining Member is a donor who contributes US\$100 or more per year to the Annual Programs Fund. A donor will not appear as a Sustaining Member on the EREY Eligibility Report until his or her personal cumulative giving for the current year has reached \$100 or more. Badge stickers should be given to members as they reach Sustaining Member status. Additional sheets of stickers (956) can be ordered at shop.rotary.org.

The Rotary Foundation of Rotary International
erey@rotary.org

www.rotary.org

Your Annual Programs Fund

Frequently Asked Questions

What is the Paul Harris Society?

The Paul Harris Society is a district-administered recognition for individuals who personally contribute US\$1,000 or more each year to the Foundation's Annual Programs Fund, PolioPlus, or humanitarian grant programs. Individual districts handle all associated recognition for their Paul Harris Society; inquiries should be directed accordingly. Society member contributions count toward Rotary Foundation recognition.

Do my APF gifts count toward Paul Harris Fellow recognition?

Yes. All gifts designated for the Annual Programs Fund are eligible for and count cumulatively toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, and Major Donor recognition. More information on donor recognition is available by visiting www.rotary.org and entering recognition in the search field.

What are Foundation recognition points?

Foundation recognition points represent contributions that an existing Paul Harris Fellow has personally made above the initial US\$1,000 but that are not yet allocated for Paul Harris Fellow recognition. An individual receives points only for contributions personally made after becoming a Paul Harris Fellow. Available points may be applied toward another individual's Paul Harris Fellow recognition. However, they do not count toward Rotary Foundation Sustaining Member or Major Donor recognition.

Foundation recognition points may only be transferred in transactions of 100 points or more, and individual donors will be the only ones authorized to transfer points from their individual accounts. Club presidents and district governors may no longer authorize point transfers for other individuals, but they may continue to authorize transfers from their club or district accounts. Additionally, individual points will expire upon the death of a Major Donor or his or her surviving spouse.

Learn more at www.rotary.org (keyword search: Foundation recognition points).

Can I apply my Foundation recognition points toward becoming a Major Donor?

No. Major Donor recognition can only be achieved through personal contributions (cumulative or outright) to the Foundation of US\$10,000 or more.

Will I receive Foundation recognition points for my contributions to PolioPlus, the Permanent Fund, or Rotary Peace Centers?

Only contributions to the Annual Programs Fund, PolioPlus, and humanitarian grant programs are eligible to receive Foundation recognition points. Contributions to the Permanent Fund are eligible for Benefactor and Major Donor recognition.

What is the difference between a 100% Rotary Foundation Sustaining Member Club and an Every Rotarian, Every Year Club?

Banner recognition of 100% Rotary Foundation Sustaining Member Clubs is awarded annually to clubs in which every active member personally contributed US\$100 or more to APF-*SHARE* during the Rotary year. Banner recognition is automatically awarded at the end and audit of the Rotary year.

A club can also be recognized annually as an Every Rotarian, Every Year Club. This recognition is awarded to clubs that achieve a minimum of US\$100 per capita from active, dues-paying members and 100 percent participation with every active member contributing some amount to APF during the Rotary year. This banner recognition is automatically awarded at the end and audit of the Rotary year.

Your Annual Programs Fund Frequently Asked Questions



How can my club be recognized as a 100% Paul Harris Fellow Club?

A Rotary club that has all of its dues-paying members as Paul Harris Fellows can be certified as a 100% Paul Harris Fellow Club and is eligible to receive a one-time special recognition banner from The Rotary Foundation.

To obtain this recognition:

1. A club leader must contact the district governor after determining that all current dues-paying club members are Paul Harris Fellows.
2. The district governor must confirm that all members are Paul Harris Fellows and submit a recognition request, either by e-mail to apf@rotary.org, mail to their international office, or mail to The Rotary Foundation at:

The Rotary Foundation OA400
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA

Please note that honorary Rotarians and former club members do not need to be Paul Harris Fellows for clubs to receive this recognition.

Future Vision Plan and the Annual Programs Fund



On 1 July 2010, The Rotary Foundation launched the pilot of the Future Vision Plan. Designed to simplify Foundation grants and processes, the plan will focus Rotarian efforts where they will have the greatest impact by addressing priority world needs that are most relevant to Rotarians. The 100 pilot districts will have a unique opportunity to share feedback and best practices to help guide the worldwide implementation of the Future Vision Plan in July 2013.

Throughout the pilot, participating districts can apply for Rotary Foundation District Grants and Rotary Foundation Global Grants to implement their service projects and activities. Global grants support larger, international projects with sustainable, high-impact outcomes in six areas of focus that correspond to the Foundation's mission:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development

District grants are block grants made to districts for up to 50 percent of their District Designated Fund. They may be used for both local and international projects and for activities that may or may not fall within an area of focus.

Rotarian contributions to the Annual Programs Fund make these service projects and activities possible. APF contributions through the Every Rotarian, Every Year appeal are the primary source of funding for Foundation projects, which cover more than 160 countries and geographical areas. From digging water wells for villages in Africa to teaching basic literacy skills to children in Latin America, thousands of Rotarians volunteer their time and expertise. All contributions to the APF are spent wisely on effective Rotary projects.

The Rotary Foundation of Rotary International
rey@rotary.org

www.rotary.org

Key to Rotary Foundation Acronyms



| | |
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| APF | Annual Programs Fund |
| AKS | Arch C. Klumph Society |
| ARRFC | assistant RRFC (zone) |
| DDF | District Designated Fund |
| EREY | Every Rotarian, Every Year |
| PHF | Paul Harris Fellow |
| RFAC | Rotary Foundation alumni coordinator (zone) |
| RFSM | Rotary Foundation Sustaining Member |
| RI | Rotary International |
| RRFC | regional Rotary Foundation coordinator (zone) |
| TRF | The Rotary Foundation |
| ZCC | zone challenge coordinator (Rotary's US\$200 Million Challenge) |

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