

RESOURCE GUIDE FOR ZONES 25 & 26

The [Resource Guide for Zones 25 & 26](#) is not an official Rotary publication but a regional resource compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

[CLICK HERE FOR THE MOST RECENT VERSION OF THIS GUIDE](#)

Note: all [blue underlined](#) text in this document are hyperlinks to online resources.

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Finding the most recent version of this Resource Guide online:

1. Visit www.zone2526.org
2. Click on “TRF” at the top of the page
3. Click on “TRF Resource Guide (Zones 25 & 26)” on the top right
4. Save to your desktop.

Feedback: Send Resource Guide feedback to: steven.solomon@rotary.org

FUNDRAISING: ACHIEVING SUCCESS

Use these resources to achieve fundraising success.

1. Lead by example.

“Give generously to create a better world” is what Knight Kiplinger suggests in his article “[Eight Keys to Financial Security](#).” Kiplinger writes, “Your own financial security depends far more than you may think on the financial, physical and spiritual health of others in your community, our nation, our world. When you share your good fortune by donating your money, time and talent to charity, you help create a stronger economy and a healthier, safer world.”

Your contributions help us strengthen peace efforts, provide clean water and sanitation, support education, grow local economies, save mothers and children, and fight disease. The [Every Rotarian Every Year](#) initiative asks every Rotarian to support The Rotary Foundation every year. In addition to contributing to the Annual Fund on a regular basis, members are encouraged to get involved in a Foundation project or program. Consider joining the Paul Harris Society and give joyously to the Foundation and be personally fulfilled knowing that your gift is *doing good in the world*.



[Contribute now](#) ▪ [Sign up for Rotary Direct](#) ▪ [Join the Paul Harris Society](#)

2. Ask others to give.

Past Rotary International President Sakuji Tanaka said, “I never lost a friend when I asked them to give to Rotary.” Contributions to The Rotary Foundation are voluntary and are an investment. The Rotary Foundation is an incredible vehicle for building a better world. Our agents of change, Rotary clubs, are filled with architects of peace--- Rotarians. Giving to The Rotary Foundation helps support the programs and projects identified, developed and managed by Rotarians all over the world.

“...Asking your donors to make an investment in your organization that will make an impact on the world is one of the greatest things you can do for a donor. Donors *want* to give. They *need* to give. Donors experience joy in their lives when they give their money away.” (“Serving your Donors Means Asking” By Richard Perry & Jeff Schreifels). Regardless of the size of the gift, face to face communication is the most effective method for personal giving discussions. Ask people to give.

[Fundraising Ideas](#) ▪ [Responses to Donor Objections](#)

*Use the [Club Foundation Banner Report](#) to monitor the Annual Fund support by the individuals in your club. You can thank those that have made gifts and share ask the others to give today!

3. Share our good work.

Create a culture of giving by educating Rotarians, Rotaractors and Interactors about our impact. The best way to reach our members is through visiting them at their club. The best way for them to learn about our Rotary Foundation is by having us come to them at their club. In addition, use Rotary’s online tools to help connect with others and share your projects.

[Rotary Giving Works](#) ▪ [Give the Gift Form](#) ▪ [Advertisements](#) ▪ Weekly: [Thoughts](#) | [Messages](#) ▪ [Event Guide](#)



Showcase	Ideas
Allows Rotarians and Rotaractors to share successful project stories, photos, and video, and report the project’s contribution to Rotary’s Global Impact. ▪ Website ▪ Guides ▪ Video ▪ Questions	Find donors, partners and volunteers for your projects. ▪ Website ▪ Guides ▪ Video ▪ Questions Four Part Series: Video 1 ▪ Video 2 ▪ Video 3 ▪ Video 4
Brand Center	Discussion Groups
Create promotional materials with our latest branding tools. ▪ Website ▪ Guides ▪ Presentation ▪ Questions ▪ Strengthen Club Video ▪ New Look Video	Share your experiences and ideas with other members. ▪ Website ▪ Guides ▪ Video ▪ Questions

4. Inspire others to give.

Storytelling can help create connections and [inspire](#) people to give generously. Testimonials from donors, beneficiaries and grant participants can be very powerful. I believe that once donors realize the impact of their contribution, they will give more. Giving testimonials are excellent tools that not only educate but inspire others to become donors or increase their Foundation gifts

[How to Tell Your Rotary Story](#) • [Storytelling eBook](#)

Videos to Inspire Giving		
Note: Use these instructions for downloading Rotary Videos from www.vimeo.com		
Rotary Channels: video.Rotary.org Rotary's Best Global Stories		
Recognize Donors Thanks: 2014 2015 2016 Ask: Give the Gift Every Smile Testimonies: Supporting the Foundation	Eradicate Polio Message: Bono (from U2) Bill Gates Polio Free: World Africa Asia Nigeria Ethiopia Rotary: This Close Big Commercial Rotary Fights PolioPlus Last Hurdle Shot Felt Faces Pakistan Triple Your Impact: #1 #2 #3	Spotlight Areas of Focus A Century of Doing Good Water is a Gift No Limits Beautiful Beginning Vision for a Better World Understand Grants Improving Lessons Sustainability Grants: District Global VTT
Promote Peace Peace Is... Voices for Peace Peace Means to Me Practicing Peace		

5. Committed to transparency.

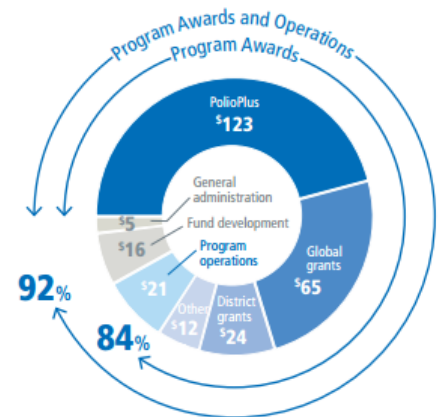
Explain our grant stewardship & fiscal responsibility. The Rotary Foundation Cadre of Technical Advisers is a group of volunteer Rotarians who provide technical expertise and advice to Rotarians planning and carrying out Rotary grant projects around the world. Cadre members review, monitor, and evaluate projects and ensure grant funds are being used properly.

“Foundation program awards were 84% of total expenses, while program operations were 8% of total expenses. This means 92% of the Foundation’s expenses directly supported our mission-critical programs and grants.”
 ([Annual Report](#) page 26)

“The Rotary Foundation has received the highest possible score from [Charity Navigator](#), an independent evaluator of charities in the U.S.... [the Foundation] earned the maximum 100 points for both financial health and accountability and transparency. The ratings reflect how efficiently Charity Navigator believes the Foundation will use donations, how well it has sustained programs and services, and its level of commitment to good governance and openness. In the previous rating, the Foundation had received 97 points.” ([webstory](#)) The Rotary Foundation moved up 35 spots to 85th in the Chronicle of Philanthropy’s top 400 nonprofit organizations in the United States ([Rotarian magazine article](#)).

[Financials](#) • [Cadre](#) • [Changing the World \(CNBC\)](#) • [Influential Nonprofits](#) • [Forbes](#)
 Investments: [Report](#) • [Returns](#) • [Philosophy](#) • [Sheet](#)
 Funding Model: [Guide](#) • [Presentation & Notes](#) • [Video](#) • [Staff](#) • [Sheet](#)

THE ROTARY FOUNDATION'S EXPENDITURES GO TO ...
 (in millions)



6. Appreciate and recognize donors.

People like to be [thanked](#) when they do nice things including donating to Rotary. Rotarians who feel that their time and money is well spent will continue volunteering with Rotary and giving to The Rotary Foundation. Rotarians who feel their contributions are appreciated are more likely to contribute again and often times increase the level of their donations. Here are some sample presentation remarks.

[Recognition webpage](#) • [Recognition & Transfer Request Form](#) • [Using Recognition Points Handout](#)

Presentation Remarks
<ul style="list-style-type: none"> ▪ Foundation Giving: Paul Harris Fellow Multiple Paul Harris Fellow Paul Harris Society Major Donor ▪ Planned Giving: Benefactor Bequest Society • Club Banner: 100% Paul Harris Fellow Club

*Learn about individual recognition opportunities on pages 6-7 and club recognition opportunities on page 8.

FUNDRAISING: ROTARY DIRECT

Support Rotary’s efforts year round by making a recurring gift. You choose how much, how often (monthly, quarterly or annually) and the method (debit card, credit card or checking account) for giving. Give to the Annual Fund, PolioPlus Fund and/or the areas of focus.

Purpose

You want to give— it’s a simple and secure way to make a big impact. Save time, money & lives by signing up for Rotary Direct. Ensure that your contributions go directly to The Rotary Foundation resulting in faster processing.

Rotary Direct Toolkit

[Form \(US\)](#) • [Form \(Canada\)](#)
[Presentation](#) • [FAQ](#)

Sign Up

- Web:** Select a recurring frequency in Step 2 of the [online contribution](#) process under the section titled “*Frequency (Enroll in Rotary Direct)”
- Phone:** 866-976-8279
- Form:** Fax to 847-328-4101
[-Rotary Direct \(USA\)](#) or [Rotary Direct \(Canada\)](#)
[-TRF Contribution Form \(123\)](#) – check the frequency box (monthly, quarterly or annually) under section “3. Contribution Details- Make this a recurring contribution.”

Frequency

If you choose to make a recurring contribution, you will be registering to make a gift every month, quarter, or year on the 1st of the month.

Note: Processing of quarterly donations occurs in July, October, January, and April. For annual contributions, you may choose the processing month.

Modify

To update your existing recurring giving, contact us at rotarydirect@rotary.org or call +1-866-976-8279. For security reasons, changes to your credit card information should be made by phone.

Acknowledgement

Upon enrollment, new Rotary Direct participants will receive an acknowledgement letter confirming the amount and frequency of their contributions. Each scheduled contribution will be credited to a donor’s individual account, Rotary club and district and will be used wisely on quality Rotary projects. Following the close of each calendar year, participants will receive one contribution receipt for all Rotary Direct contributions received during the previous calendar year.

Reports

The [Club Recognition Summary](#) & [Club Foundation Banner](#) reports simply identify Rotary Direct participants. If you need further detail, please contact your Annual Giving Officer for a more detailed Rotary Direct report.

ROTARY DIRECT

Rotary's recurring giving program



DOING GOOD JUST GOT EASIER!

Enroll online: www.rotary.org/give

OR Mail: Rotary Direct FD420
 Rotary International
 One Rotary Center
 1560 Sherman Avenue
 Evanston, IL 60201-3698 USA

OR Fax: +1-847-328-5260
 Please call to modify your existing Rotary Direct contributions
 Phone: +1-866-976-8279

ROTARY DIRECT SAVES...

- ✓ **Time** — Sign up once to give continuous support
- ✓ **Money** — Lower administration costs means more money for programs
- ✓ **Lives** — Give to The Rotary Foundation to do good in the world

YES! I INTEND TO GIVE \$1,000 OR MORE ANNUALLY AND WILL JOIN THE PAUL HARRIS SOCIETY.*

YES! I WILL ENROLL IN ROTARY DIRECT.

Name _____

IF YOU ARE A ROTARIAN, PLEASE COMPLETE.

Rotary membership ID _____

Club name _____

Club number _____

Billing address _____

City _____ State/Province _____

Postal code _____ Country _____

Phone _____

Email _____

Contributions are tax deductible where allowed by law. For security purposes, please do not send credit card contributions via email.

*Note: The Paul Harris Society recognizes those who give \$1,000 or more each year to the Annual Fund, PolioPlus Fund, or an approved Foundation grant. Learn more at www.rotary.org/paulharrissociety.

GIFT DESIGNATION (choose one)

Annual Fund-SHARE PolioPlus Fund

Providing Clean Water Fighting Disease

Supporting Education Saving Mothers and Children

Promoting Peace Growing Local Economies

Other _____

RECURRING GIFT AMOUNT (minimum US\$10)

\$25 \$85 \$100 \$250 \$1,000 Other _____

Currency (if not US\$) _____

FREQUENCY

Monthly Quarterly Annually (specify month) _____

CHECKING ACCOUNT, please attach a voided check
Available for U.S. and Canada bank accounts only – not available online

CREDIT OR DEBIT CARD

Visa MasterCard AmEx Discover

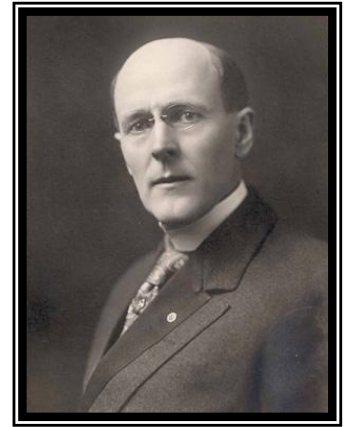
Card number _____

Expiration / CVN

Signature _____




RECOGNITION: PAUL HARRIS SOCIETY



The Paul Harris Society (PHS) is an official recognition program of The Rotary Foundation for individuals who personally contribute \$1,000 or more to the Annual Fund, PolioPlus Fund and/or an approved global grant every Rotary year, when financially able. Contributions to the Endowment Fund and Disaster Recovery Funds are not eligible for PHS membership.

We say “when financially able” to allow some wiggle room if an individual is having financial issues one Rotary year that may prevent them from meeting their expressed intent as a PHS member.



Join

1. Visit the PHS page [to join](http://www.rotary.org/paulharrissociety) online: www.rotary.org/paulharrissociety
2. E-mail RotarySupportCenter@Rotary.org or call +1-866-976-8279
3. Use the [PHS form](#) which can be faxed to 847-328-5260 or email annualfund@rotary.org

Questions & Resources

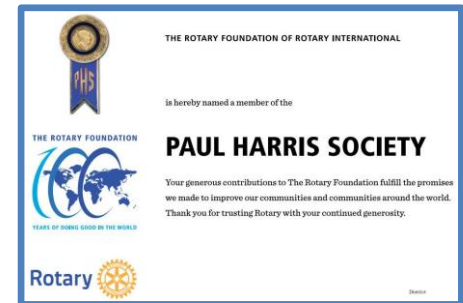
Your [District Paul Harris Society Coordinator \(PHSC\)](#) is the primary contact for your PHS questions and is responsible for providing PHS insignia for members.

Acknowledgement

After joining, new PHS members will receive an acknowledgement email confirming their PHS membership from The Rotary Foundation and an email is sent to your District Paul Harris Society Coordinator who provides the PHS recognition to you.

Paul Harris Society Toolkit

Join: [Website](#) ▪ [Form](#) ▪ [Brochure \(099\)](#) ▪ [Advertisement](#) ▪ [Your PHSC](#)
 PHS Report: [Guide](#) | How to: [Presentation](#) ▪ [Guide](#) ▪ [Webinar](#) | FAQ: [Handout](#)
 Recognition: [Remarks](#) ▪ [Certificate](#) ▪ [Centennial Certificate](#)
 Convention Breakout: [Presentation](#) | [Slides & Notes](#)



Recognition

The Trustees approved the Chevron-style recognition pin as the official Paul Harris Society wearable recognition which is given to members in appreciation for their support by their [District Paul Harris Society Coordinator](#). The District Paul Harris Society Coordinator can request more insignia by emailing annualfund@rotary.org with their preferred mailing address and reasonable quantities needed.

Reports

The second tab of the [Paul Harris Society Report](#) includes PHS join date, donor contact information including email, telephone and mailing address. The second tab is useful for doing email and mail merges (i.e. thank you letters, email reminders, invitations to recognition events, etc.)

Note: Donors can see their PHS membership and PHS eligibility on their individual [donor history report](#). The [Club Foundation Banner Report](#) also lists PHS membership.

Club	ID	Name	PHS Member	PHS Join Date	Rotary Direct	PHS Eligible 14-15	PHS Eligible 13-14	PHS Eligible 12-13	PHS Eligible 11-12
Chicago	13245	Paul Harris	Y	1 July 2013	Y	1 July 2015	1 July 2013	1 July 2012	1 July 2011

A “**PHS Member**” is an individual who has joined the Paul Harris Society and agreed to support the Foundation every Rotary year with a \$1,000 or more contribution to the Annual Fund, PolioPlus Fund and/or an approved global grant, when financially able.

A “**PHS Join Date**” is the day that Rotary International processed the request to add the PHS member.

“**Rotary Direct**” is an individual who is participating in Rotary’s recurring giving program. Please note that an individual’s PHS eligibility will only populate with a date after their total contributions has reached at least \$1,000 for a given Rotary year.

“**PHS Eligibility**” tracks an individual’s achievement toward PHS recognition during a given Rotary year. The eligibility information provides opportunities for thanking donors, identifying prospective PHS members and sending contribution reminders for current PHS members (who are not giving through Rotary Direct).

RECOGNITION: INDIVIDUAL DONORS

The Rotary Foundation welcomes a number of opportunities to show its appreciation to individuals for supporting its grants and programs.

*Through [My Rotary](#), you can view your [Donor History Report](#) which includes your personal contribution history and recognition summary. Request your Donor History Report by emailing RotarySupportCenter@Rotary.org

Rotary Foundation Sustaining Member

When you give \$100 or more per year to the Annual Fund.

*Use the [Sustaining Member badge stickers \(956\)](#) to recognize these donors in your club.

*Use the [Club Foundation Banner Report](#) to see your Rotary Foundation Sustaining members.

*For more on Annual Fund & SHARE, visit our [web page](#) or read the [EREY brochure \(957\)](#).



Paul Harris Fellow

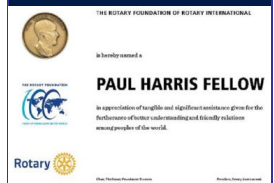
When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. The recognition consists of a certificate and pin. Optional recognition items include a [medallion \(PHF\)](#) for \$15 and a complimentary [Certificate Cover \(PHCEN\)](#).

*Use the [Club Recognition Summary](#) to see your Paul Harris Fellows.

*Learn about the [History of Paul Harris Fellows](#).

Note: PHFs can be a combination of cash contributions and Foundation recognition points received.

Note: The TRF Centennial logo will appear on the Paul Harris Fellow certificates distributed during the 2016-17 Rotary year.



Certificate of Appreciation

Certificate of Appreciation recognition is given to honor a business or organization. Since Paul Harris Fellows are only for individuals, a donor may use their Foundation recognition points to award a business or organization a Certificate of Appreciation.



Multiple Paul Harris Fellow

When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

*Use the [Club Recognition Summary](#) to see your multiple Paul Harris Fellows.

Recognition items commemorate giving at these levels:

- Level +1: 2,000 to 2,999.99 1 sapphire
- Level +2: 3,000 to 3,999.99 2 sapphires
- Level +3: 4,000 to 4,999.99 3 sapphires
- Level +4: 5,000 to 5,999.99 4 sapphires
- Level +5: 6,000 to 6,999.99 5 sapphires
- Level +6: 7,000 to 7,999.99 1 ruby
- Level +7: 8,000 to 8,999.99 2 rubies
- Level +8: 9,000 to 9,999.99 3 rubies

* range can be a combination of cash contributions and Foundation recognition points received

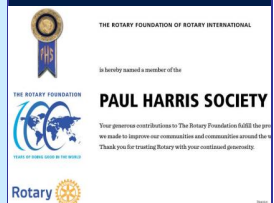


Paul Harris Society




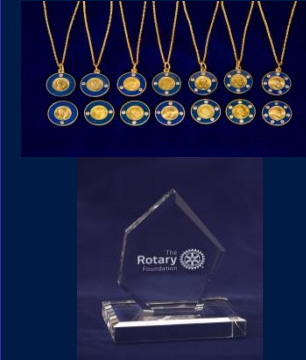
When you give \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant. Learn more about the [Paul Harris Society](#).

*Use the [Paul Harris Society Report](#) to see your PHS members and their PHS eligibility.

Note: The TRF Centennial logo will appear on the Paul Harris Society certificates distributed during the 2016-17 Rotary year.



RECOGNITION: INDIVIDUAL DONORS

<p>Major Donor</p> <p>When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant.</p> <p>*Major Donors are listed on the Major Donor, Arch Klumph and Bequest Society report.</p> <p>Major Gifts, Major Impact brochure (166)</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> Level 1: \$10,000 to \$24,999 Level 2: \$25,000 to \$49,999 Level 3: \$50,000 to \$99,999 Level 4: \$100,000 to \$249,999 	
<p>Arch Klumph Society</p> <p>When your cumulative donations reach \$250,000. Recognition includes an induction ceremony at the Rotary International headquarters in Evanston, Illinois, USA, and your picture and biography in the Arch Klumph Society interactive gallery. You also receive invitations to society events, along with membership pins and crystals.</p> <p>AKS members are listed on the Major Donor, Arch Klumph and Bequest Society report.</p> <p>Arch Klumph Society brochure (308)</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> Trustees Circle: \$250,000 to \$499,999 Chair's Circle: \$500,000 to \$999,999 Foundation Circle: \$1,000,000 to \$2,499,999 Platinum Trustees Circle: \$2,500,000 to \$4,999,999 Platinum Chair's Circle: \$5,000,000 to \$9,999,999 Platinum Foundation Circle: \$10,000,000 and above 	
<p>Benefactor</p> <p>When you include the Endowment Fund as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.</p> <p>*Benefactors are listed on the Benefactor Report & identified on the Club Recognition Summary.</p> <p>Your Rotary Legacy brochure (330)</p>		
<p>Bequest Society</p> <p>When you give \$10,000 or more via your estate plans. Bequest Society members are recognized with an engraved crystal recognition piece and a Bequest Society pin.</p> <p>*Bequest Society members are listed on the Major Donor, Arch Klumph and Bequest Society report.</p> <p>Your Rotary Legacy brochure (330)</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> Level 1: \$10,000 to \$24,999 Level 2: \$25,000 to \$49,999 Level 3: \$50,000 to \$99,999 Level 4: \$100,000 to \$249,999 Level 5: \$250,000 to \$499,999 Level 6: \$500,000 to \$999,999 Level 7: \$1,000,000 to \$2,499,999 Level 8: \$2,500,000 to \$4,999,999 Level 9: \$5,000,000 to \$9,999,999 Level 10: \$10,000,000 and above 	






RECOGNITION: CLUB BANNERS

The Rotary Foundation shows its appreciation to Rotary clubs for supporting our grants and programs.

*Check out the [Club Banner Recognition Guide](#) & visit the [Foundation Recognition webpage](#).

Note: As of 2015-16 Rotary year, new club members will not be included in the participation requirements for club banners (excluding the 100% PHF Banner). This includes Rotarians who joined Rotary or transferred from another club during the current Rotary year. However their contributions will be used for per capita calculations.

*Use the [Club Foundation Banner Report](#) to determine if your club will qualify for the following annual recognition banners. Final banner certification is processed by The Rotary Foundation following the close of the Rotary year (June 30). Club banners earned for the prior Rotary year are automatically shipped to the sitting district governor in October/November.

<p>100% Foundation Giving Club</p> <p>This banner is awarded to clubs where every active (dues-paying) member contributes at least \$25 to The Rotary Foundation and the average contribution is at least \$100 to any Rotary Foundation gift designation.</p>	 <p>The Rotary Foundation 100% PER CAPITA 100% MEMBER PARTICIPATION</p>
<p>100% Every Rotarian, Every Year Club</p> <p>This banner is awarded to clubs where every active (dues-paying) member contributes at least \$25 to the Annual Fund, with an average of at least \$100 per capita to the Annual Fund.</p>	 <p>The Rotary Foundation EVERY ROTARIAN EVERY YEAR 100% SUSTAINING MEMBER CLUB</p>
<p>Top Three Per Capita in Annual Fund Giving Club</p> <p>For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.</p>	 <p>The Rotary Foundation No. 1 Club in District No one really started fund giving in The Rotary Foundation of Rotary International</p>
<p>100% Paul Harris Society Club</p> <p>For clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus Fund, or global grants within a Rotary year</p>	 <p>PHS</p>
<p>100% Paul Harris Fellow Club</p> <p>For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition, but the intent is that the club will maintain the 100% Paul Harris Fellows.</p> <p>*Use the Club Recognition Summary to determine if your club will qualify for this recognition; once awarded, the date achieved appears on the top of this report.</p> <p>To obtain this recognition:</p> <ol style="list-style-type: none"> 1. A club representative contacts the district governor after determining that all current, dues-paying club members are Paul Harris Fellows using the Club Recognition Summary 2. The district governor confirms this achievement by emailing RotarySupportCenter@Rotary.org to request the banner for the club. 	 <p>The Rotary Foundation 100% PAUL HARRIS FELLOW CLUB The Rotary Foundation</p>

RECOGNITION: FOUNDATION RECOGNITION POINTS



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL

is hereby named a

PAUL HARRIS FELLOW

In appreciation of tangible and significant assistance given for the furtherance of better understanding and friendly relations among peoples of the world.

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund or PolioPlus Fund, or an approved global grant. Donors receive one recognition point for every U.S. dollar contributed to these funds. Contributions to the Endowment Fund are not eligible.

Donors can transfer Foundation recognition points to others to help them qualify as a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor's death, unless the points are transferred, or until the donor uses them (the surviving spouse of a Major Donor may also use the points).

Note: Foundation recognition points do not count towards Paul Harris Society or Major Donor recognition.

Paul Harris Fellow Toolkit

[Form](#) ▪ [Medallion](#) ▪ [Certificate Cover](#) ▪ [FAQ](#) ▪ [History](#) | Recognition: [Web](#)
 Presentation Remarks: [PHF](#) ▪ [Multiple PHF](#) ▪ [Paul Harris Society](#) ▪ [100% Paul Harris Fellow Club](#)

Transfer Rules & Recognition Requests

A minimum of 100 Foundation recognition points must be transferred at a time, and you must complete and sign the [Recognition and Transfer Request From \(102\)](#). The points may not be transferred from individuals to a club or district. Recognition materials are shipped automatically by default to the current club president when the new level is achieved. To ship materials somewhere else, please complete the “Shipping” section on the Recognition and Transfer Request From (102).

Note: Foundation recognition points may not be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow themselves before Foundation recognition points are awarded.

- Individual donors are the only ones authorized to transfer recognition points from their individual account. [Individual's Foundation recognition points are listed in the [Club Recognition Summary](#) or their Donor History Report]
- Club presidents are the only ones authorized to transfer recognition points from a club account. [Club's Foundation recognition points are listed in the Club Fundraising Analysis]
- District governors are the only ones authorized to transfer recognition points from a district account. [District's Foundation recognition points are listed in the District Fundraising Analysis]

Reports

Donor History Report

Through your My Rotary account, you can view your personal contribution history, recognition amount, and available Foundation recognition points. You can request a copy of your Donor History Report from the Foundation at rotarysupportcenter@rotary.org

Club Recognition Summary

Your club and district leaders can view the online [Club Recognition Summary](#), which includes the recognition amount, tally of recognition points, current Paul Harris Fellow level, and date that level was achieved.

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	Last Contribution	Benefactor	Rotary Direct
132457	Paul Harris	Y	2,266	PHF +1	Jan- 2013	1,500	July 2013 AF-SHARE	Y	
428413	Arch Klumph	Y	9,000 *	PHF +8	May-2014	11,897	May 2014 AF-SHARE	Y	Y

Recognition amount reflects the total Paul Harris Fellow recognition you have accumulated through your personal contributions plus all recognition points you've been given by other individuals, clubs, or districts. Recognition points given to you do not count toward Major Donor recognition. The maximum amount that can be shown on the [Club Recognition Summary](#) report is 9,000; the “+” sign indicates that the actual amount exceeds the 9,000-point maximum.

Foundation Recognition Pts Available reflects points you have accumulated through personal outright giving to the Foundation. All points listed can be transferred to other individuals for Paul Harris Fellow recognition.

REPORTS: USING FOUNDATION REPORTS



The Rotary Foundation - Club Recognition Summary as of January 14, 2015

Somewhere, IL, United States

A 100% Paul Harris Fellow Club 2013-2014

District ID: 9999	Paul Harris Fellows: 26	Bequest Society: 4	Rotarian Donors: 34	Rotary Direct Donors: 6	All-Time Giving: \$123,539.01
Club ID: 99999	Benefactors: 4	Major Donors: 1	Rotarian Non-Donors: 0	Non-Rotarian Donors: 0	

Rotary ID	N A M E	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor	Rotary Direct
99999	R/C of Somewhere					3,099.75	Dec-2014 POLIO PLUS		
1234567	Adams, John	Y	1,055.00	PHF	Dec-2014	705.00	Jan-2015 AF-SHARE	N	Y
7654321	Anderson, Jane	Y	160.00	PHF	May-2009	160.00	Nov-2014 AF-SHARE	Y	
1357975	Bakers, Bob	Y	2,425.00	PHF+1	Nov-2007	912.50	Nov-2014 AF-SHARE	N	

[Using the Club Recognition Summary Guide](#)



CLUB FOUNDATION BANNER REPORT

FOR ROTARY YEAR: 2015-16

Evanston Lighthouse, IL, United States

District: 6440	TRF Giving Rotarians: 32	A	Sustaining Member Rotarians: 21	B	PHS Members Rotarians: 3	C	2015-16 Annual Fund Per Capita: \$118.57	E
Club ID: 22901	Non-TRF Giving Rotarians: 33		Non-Sustaining Member Rotarians: 44		Rotary Direct Rotarians: 10	D	2015-16 Average TRF Giving: \$147.55	F

Rotary ID	Name	Club Member on 29-Mar-16	TRF Giving Achieved 2015-16	EREY Achieved 2014-15	Sustaining Member Achieved 2015-16	Sustaining Member Achieved 2014-15	Paul Harris Society Member	Rotary Direct
8341004	Abrams, Arthur	Y		22-May-2015		22-May-2015		Y
1879671	Allen, John +	N	30-Dec-2015 E	03-Aug-2014	30-Dec-2015	03-Aug-2014	Y	
9391011	Barker, Benjamin	H						

[Using the Club Foundation Banner Report Guide](#)



MONTHLY CONTRIBUTION REPORT

For July through June (2013 - 2014) A

(In US Dollars)

Club No	Name	Number of Members	Annual Fund Goal Amount	Goal % Achieved	AF Per Capita	-- Annual Fund --		-- Other Funds --		-- Endowment Fund --		-- Total --
						Month	YTD	Month	YTD	Month	YTD	
District:9999												
9999	District 9999 Contributions	0	\$0.00	0%	\$0.00	\$0.00	\$242.24	\$0.00	\$3,000.00	\$0.00	\$0.00	\$3,242.24
1234	Small Town, IL, United States	24	\$3,700.00	120%	\$185.21	\$875.00	\$4,445.00	\$0.00	\$4,000.00	\$0.00	\$0.00	\$8,445.00
6789	Big City, IL, United States	27	\$4,500.00	89%	\$148.11	\$25.00	\$3,998.85	\$0.00	\$505.00	\$0.00	\$0.00	\$4,503.85


[Using the Monthly Contribution Report Guide](#)


REPORTS: FUNDRAISING REPORTS


Click on the report name to access the user guide (if available.)

Report	Information Available	Access	Format	Location
Donor History	<ul style="list-style-type: none"> Provides a comprehensive breakdown of a donor's transactions (contributions, Foundation recognition point transfers in/out, commitments and recognition) *Use to reconcile contributions/recognition issues 	individual	PDF	My Rotary Support Center
Club Foundation Banner	<ul style="list-style-type: none"> Provides eligibility dates achieved for club banner recognition for current Rotary year, lists PHS membership & Rotary Direct donors 	club district	PDF Excel	My Rotary Support Center
Club Fundraising Analysis	<ul style="list-style-type: none"> Provides a 5 Rotary year of Annual Fund goals, giving and recognition *Use for goal setting 	club district	PDF	My Rotary Support Center
Club Recognition Summary	<ul style="list-style-type: none"> Provides club member's Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct donors, benefactors, last contribution date & designation. Indicates 100% Paul Harris Fellow Club achievement and date along with the club's all-time Foundation giving 	club district	PDF Excel	My Rotary Support Center
Monthly Contribution Report	<ul style="list-style-type: none"> Provides contribution information by club for Annual Fund, Other Funds (global grants & PolioPlus) & Endowment Fund *Use to identify non-contributing clubs 	district	PDF Excel	My Rotary Support Center
Paul Harris Society Report	<ul style="list-style-type: none"> Provides PHS membership with PHS join date, & a 4 Rotary year history of PHS eligibility Includes tab with donor contact information including email, telephone and mailing address. *Learn about the Paul Harris Society on page 5 	club district	Excel PDF	My Rotary Support Center
Foundation Banner Recognition Status	<ul style="list-style-type: none"> Provides progress toward club banner recognitions (100 % Every Rotarian, Every Year Club, 100% Foundation Giving Club, Annual Fund Top 3 Per Capita) for a Rotary year *Lists the percentage of participation by club for EREY & Foundation Giving recognition *Banner recipients listed in this report may fluctuate throughout the Rotary year due to changes in membership and additional or redistributed contributions. Final certification is processed by The Rotary Foundation following the close of the Rotary year. 	district	PDF Excel	My Rotary (only district leadership) Support Center
District Fundraising Analysis	<ul style="list-style-type: none"> Provides an 5 Rotary year dashboard for district giving to the Annual Fund, PolioPlus, Endowment Fund and Total Giving Lists all-time recognition for Paul Harris Fellow, Benefactor, Bequest Society and Major Donor data Provides five Rotary years of Paul Harris Fellow, Benefactor, Bequest Society, Major Donors, Major Gifts, EREY, Sustaining Member and Paul Harris Society eligible data Lists number of total endowed funds and their market value 	district	PDF	My Rotary (only district leadership) Support Center
Recognition Report	<ul style="list-style-type: none"> Provides lists of Bequest Society, Major Donor and Arch Klumph Society members with their recognition date achieved Report includes two additional tabs with mailing address *Use excel version for mail merge for invitations 	club district	PDF Excel	My Rotary Support Center
Program Participants & Alumni	<ul style="list-style-type: none"> Provides a list of current and past program participants associated to a particular district; three tabs provide information individuals residing, hosted and sponsored by a district. 	district	PDF Excel	My Rotary Support Center

REPORTS: MY ROTARY & ROTARY CLUB CENTRAL

My Rotary 	
Find everything you need to conduct your Rotary business	
Note: The desktop version of the site needs to be viewed on modern browsers – Internet Explorer 9 or higher, Chrome, Firefox and Safari.	
Resources	Questions
Guides • Tips • Webinar • FAQ Learning Center: Video Delegation: Guide • Questions	Club & District Support Find your representative

Rotary Club Central 			
Helps clubs monitor their membership initiatives, service activities, and Foundation giving			
Resources		Questions	
Foundation Reports Videos: Club Officers • District Officers Goal Setting Videos: Overview • Your Club • Service • Foundation Giving Guides: • Club • District • Coordinator • Webinar • Foundation Goals Worksheet		Rotary Support Center 866-976-8279 RotarySupportCenter@Rotary.org	
Task	Club Member	Club, District & Zone Leader	To Access Rotary Club Central
View Goals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	click “My Rotary” → see “My Club Snapshot” box on left, see Rotary Club Central below, click “View Goals” below
Edit Goals		<input checked="" type="checkbox"/>	

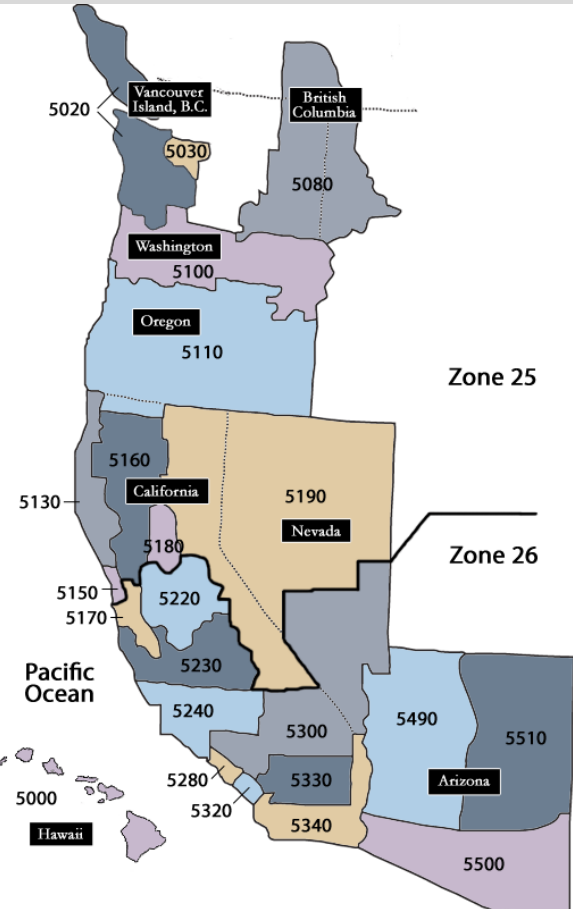
Rotary Foundation Reports 				
Foundation Reports Videos: Club Officers • District Officers *To access reports click on “My Rotary” → click on “The Rotary Foundation” → click on “Foundation Reports” Adding Officers: Club Guide • District Guide				
Reports Available	Club		District Leader	Zone Leader
	Member	Leader		
• Donor History Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Club Reports • Benefactor Report • Club Recognition Summary • Club Foundation Banner Report • Major Donor, Arch Klumph & Bequest Society Report • Club Fundraising Analysis • Paul Harris Society Report	District Reports • Monthly Contribution Report • PolioPlus Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
• Available DDF by District, Termed/Endowed Global Grant, Gift Availability Report, Endowed Fund Update, Foundation Banner Recognition Status Report, District Fundraising Analysis , Current Club Officer Giving Report & Incoming Club Officer Giving Report			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Note: Club treasurers, Foundation chairs & Membership chairs gain access after the current President or Secretary/Executive Secretary add them through their “My Rotary” → “Manage” → “Club Administration” → “Add/edit/remove club officers.”				
Additional District Report: TRF District Profiles (not available on the Rotary website)				
*To request a Foundation report e-mail RotarySupportCenter@Rotary.org or call 866-976-8279				

RESOURCES: HYPERLINKS

Click the folder image (📁) to access the folder filled with [Foundation resources](#).

Foundation Basics	Contribution & Forms 📁
Foundation: Reference Guide (219) • Presentation • Fact (159) Annual: Report (187) • Newsletters: Subscribe • Publications: List	Donor History Report: How to generate Rotary Direct: Form (US) • Form (Canada) • FAQ • Presentation Contribution (123): Form • Web IRA Transfer: Form Multiple Donor (094): Form • How to generate Give the Gift: Form • Web Paul Harris Society: Form Memorial & Tribute: Form Gift Acceptance Policy: Manual Ways to Give: Brochure (173) • Web Matching Gifts: Website • FAQ • Advertisement Objections & Responses: Handout • Web
Annual Giving 📁	Finance, Investments & Funding Model
Annual Fund: Web • Brochure (957) • Presentation • Blog Doing Good: Video • Advertisements Banners: Guide Foundation Minutes: Thoughts • Messages Sustaining Member: Stickers (956) • Proud Donor: Logo Convention Breakout: Presentation Slides & Notes	Finance: Web Investments: Report • Returns • Philosophy • Sheet Funding Model: Guide • Presentation & Notes • Video • Staff • Sheet
Planned & Major Giving 📁	Recognition & Forms 📁
Major Gifts: Brochure (166) • Handout • Guide Endowment Fund: Report AKS: Brochure (308) Bequest: Language • Brochure (330) • Web • Tax ID Planned Giving: Website • Handout (USA) • Handout (Canada) Endowment Fund: Handout • Donor Stories • Report Named Funds: Handout • Life Insurance: Handout Donor Advised Fund: Handout • Circular (382) • Log In Gift & Estate Planning Program: Guide • Webinar • Slides	Recognition: Web Paul Harris Fellow: Form • FAQ • History • Medallion Banners: Guide Major Donor: Form Recognition Replacement: Form
Paul Harris Society 📁	Global Rewards 📁 & Rotary Credit Card 📁
Join: Web • Form • Brochure (099) • Your PHSC How to: Presentation • Guide • Webinar FAQ: Handout Recognition: Remarks • Certificate Reports: Guide	Global Rewards: Website • Video • Staff Rotary Credit Card: USA • Canada
End Polio Now 📁	Alumni 📁
End Polio Now: Brochure (944) • Poster (941) • Video • Web Sheet • Infographic • Take Action • Facebook • Guide • Pins The Plus in Polio Plus: Guide • Fact Sheet Lighting: Guide Media: Web Endgame: Prezi	Alumni: Website • Newsletter • Questions • Presentation • Pin Engagement • FAQ • Reports • Facebook • LinkedIn • Map Associations: Map • FAQ Peace Fellows: Map
Grants 📁	Rotary Peace Centers 📁
Grants: Handout • Manual • Presentation • Terms • Staff • Resources District: Video • Scholarship Global: Guide • Video Scholarship • Process • Presentation • Reporting Online Fair for Grants: District Web • Global Web Vocational Training Teams: Guide • Fact Sheet • Video Scholarships: Presentation • Fact Sheet • Flier • Orientation Sustainability: Guide • Video • Six Steps • Sheet Effective Projects: Guide Cadre: Web Tech Coordinator: List	Application: Video • Web • Application (083) • FAQ • Tips • Recruitment • Select a top scholar • Press Release Peace Centers: Web • Presentation • Map & Using Map Webinar • Newsletter • Leaflet (084) • Guide (085) • Logo Peace is: Video • What Peace Means to Me: Video • Voices for Peace: Video • Practicing Peace: Video Support Peace Centers: Web • Making Peace a Reality (850) • Pins (089) • Tie • Scarf Social Media: Facebook • Blogs
Manuals	
Foundation: Club Committee: Manual (226E) • District Committee: Manual (300) • Seminar: Manual (438) • Grant Management: Manual Lead Your District: Committee: Manual (249) • Train: Manual (246) • Club Pres: Manual (222) • AG: Manual (244) • DG: Manual (233) Code of Policies: Manual • Procedure: Manual (035) • Rotary E-Clubs: Manual • Trainers Resources: Web • Event Planning: Manual (216)	

RESOURCES: FOUNDATION TEAM ROTARIANS

Zone 25 Foundation Team Bios	Website http://zone2526.org	Zone 26 Foundation Team Bios
Regional Rotary Foundation Coordinator (RRFC)* Wyn Spiller 530-913-6470; 530-265-3991 wyn.spiller@gmail.com	<p style="text-align: center;">Zone Videos</p> <p style="text-align: center;">Regional Leader Directory</p> <p style="text-align: center;">*serve all districts in their respective Zone</p> 	Regional Rotary Foundation Coordinator (RRFC)* Marge Cole 619-335-0590 margecole81@gmail.com
Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5020, 5030, 5080 Bill McCarthy 360-791-1467 bill@answersinc.net		Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5240, 5280, 5320, 5300, 5330, 5340 Miles Petroff C 909-993-4615; H 909-628-4877 miles.petroff@verizon.net
Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5100, 5110, 5190 LeAnn Mobley 541-944-0054 leann.mobley@gmail.com		Asst. Regional Rotary Foundation Coordinator (ARRFC) Paul Harris Society* Districts: 5000, 5170, 5220, 5230 Rosalynn "Roz" Cooper B 808-382-6340 cooperroo1@hawaii.rr.com rosalynn.d.cooperhannah.civ@mail.mil
Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5130, 5150, 5160, 5180 Kevin Eisenberg 707-266-4967 kjeisenberg@gmail.com		Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5490, 5500, 5510 Teree Bergman H 520-544-5987; C 520-395-6804 luygoldens@me.com
End Polio Now Coordinator* Dennis Wickham W 360-397-6226; H 360-606-2109 wickhamdj@comcast.net		End Polio Now Coordinator* Anil Garg H 805-583-0246; B 805-520-9790 anil.garg@lpl.com
Endowment/Major Gift Adviser* Richard Clarke 250-941-4595 or 250-650-4595 137clarke@gmail.com		Endowment/Major Gift Adviser* Brenda Cressey H 805-238-4264 rotarybrenda@gmail.com

RESOURCES: WORLD HEADQUARTERS STAFF

Rotary Support Center	
Answers Rotary Questions Provides Reports	
Telephone: 866-9ROTARY (866-976-8279)	
Email: RotarySupportCenter@Rotary.org Fax: 847-328-4101	
Hours: Monday through Friday from 8 a.m. to 5 p.m. Central Time	
Questions	My Rotary • Contributions • Refunds • Corrections • Redistributions All Paul Harris Fellow Issues • Foundation Recognition Points • Recognition Items One Rotary Center Visits and Tours
Services	Enroll in Rotary Direct • Join the Paul Harris Society • Make a Contribution Over the Phone
Reports	Donor History Report • Club Fundraising Analysis • Paul Harris Fellow Report Monthly Contribution Report • Club Foundation Banner Report • Club Recognition Summary District Fundraising Analysis • PolioPlus Report • Paul Harris Society Report • Banner Report Recognition Report for Bequest Society, Major Donor & AKS • Alumni Reports

Publication Order Services	
Multimedia Publications Supplies	
Web: shop.rotary.org Telephone: 847-866-4600 Fax: 847-866-3276 Email: shop.rotary@rotary.org	
Publications: List Hours: Monday through Friday from 8:30 a.m. to 4:30 p.m. Central Time	

Club & District Support				Membership
Rotary Club Central My Rotary Find Staff Representative				
Assists Districts in Zones 25 & 26 (except Districts 5020 & 5080)		Assists Districts 5020 & 5080*		Zones 25 & 26 Website
James Damato Supervisor 847-866-3405 james.damatojr@rotary.org	Emily Tucker Coordinator 847-866-3258 emily.tucker@rotary.org	Victoria Schiffman* Senior Coordinator 847-866-3354 victoria.schiffman@rotary.org	Kaitlin Kirk* Coordinator 847-866-3069 kaitlin.kirk@rotary.org	Nicole Jones Senior Regional Membership Officer 847-866-3407 nicole.jones@rotary.org

End Polio Now	PolioPlus	SHARE	Rotary Peace Centers
Handles fundraising questions Clare Monroe PolioPlus Campaign Specialist 847-424-5244 clare.monroe@rotary.org	Handles program questions David Green PolioPlus Coordinator 847-866-3305 polioplus@rotary.org	District Designated Funds (DDF) Steve Lyons SHARE Supervisor 847-866-3362 steve.lyons@rotary.org	Handles program questions Emily Ruf Rotary Peace Centers Coordinator 847-866-3252 emily.ruf@rotary.org

Areas of Focus Managers	Rotary Alumni	Recognition	
Available for consultation about project design, new initiatives and grants	Assists with program questions	Assists with Major Donor recognition Form	Assists with Benefactor & Bequest Society recognition
Staff Contact List	alumni@rotary.org	majordonorcoord@rotary.org	bbs@rotary.org

Zone	District & Global Grants	Major Giving	Planned Giving	Annual Giving
	Handles Rotary grants ; Staff Contact List	Provides options for major gifts	Handles Life Income Agreements, Donor Advised Fund and testamentary gifts	Promotes Every Rotarian Every Year , Rotary Direct, and Paul Harris Society
25	Renée Reiling Regional Grants Officer 847-866-3314 renee.reiling@rotary.org	Elizabeth Cruft-Anderson Senior Major Gifts Officer 847-866-3074 or 503-744-0865 elizabeth.cruft-anderson@rotary.org	Erin Jones Senior Planned Giving Officer 847-866-3831 619-944-3318 erin.jones@rotary.org	Steven Solomon Senior Annual Giving Officer 847-866-3195 steven.solomon@rotary.org
26	Cecelia Walter Regional Grants Officer 847-424-5266 cecelia.walter@rotary.org	Beth Garrow Major Gifts Officer 847-866-3034 beth.garrow@rotary.org		