

Table of Contents	
Chapter 1: Fundraising	Page
Tips on Achieving Success	2
Rotary Direct	4
Chapter 2: Recognition	Page
Paul Harris Society	5
Individual Donors	6
Club Banners	8
Foundation Recognition Points	9
Chapter 3: Reports	Page
Using Foundation Report Guides	10
Fundraising Reports	11
My Rotary & Rotary Club Central	12
Chapter 4: Resources	Page
Hyperlinks	13
Foundation Team Rotarians	14
World Headquarters Staff Rotary Support Center	15



FUNDRAISING: TIPS ON ACHIEVING SUCCESS



Give first and lead by example.

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](#) ▪ [Join the Bequest Society](#)



Acknowledge previous giving and say thank you.

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](#) ▪ [Understanding Recognition Points](#)

GLOBAL GRANTS: SUCCESS by DESIGN



Educate and inspire others to give.

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. 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.

[Successful Grants](#) ▪ [Reference Sheets](#) ▪ [Tell Your Rotary Story](#) ▪ [Storytelling](#)

YOUR GIFT: FROM START to FINISH



Committed to transparency. [Your Gift: From Start to Finish](#)

Explain our grant stewardship and dedication to fiscal responsibility. The Rotary Foundation Cadre of Technical Advisers offers its expertise to assist Rotarians who are planning and implementing projects. It also ensures that Foundation grant funds are used properly and assists the Foundation Trustees in the funding process. Cadre members are Rotarians from around the world who are familiar with the grant program and have technical and professional expertise in one or more of Rotary’s areas of focus and financial auditing. View our [Annual Report](#) for more information.

The Rotary Foundation was named as the “World’s Outstanding Foundation for 2016” by the Association of Fundraising Professionals and proudly retains the highest possible score from [Charity Navigator](#), an independent evaluator of charities in the U.S. You can read more about this accomplishment [here](#).



[Financials](#) ▪ [Cadre](#) ▪ [CNBC](#) ▪ [Forbes](#) ▪

Funding Model: [Guide](#) ▪ [Sheet](#)

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.



Show Rotary's impact.

Given the broad reach of Rotary, it is easy to lose sight of just how much good is done by Rotary projects. However, it is essential to the future of Rotary to show and tell those stories. Below are several resources to help introduce and update others on the work being done by Rotary in communities worldwide.

Showcase	Ideas
Share successful project stories, photos, and video; report the project's contribution to Rotary's Global Impact. Website ▪ Guides	Find donors, partners and volunteers for your projects. Website ▪ Guides
Brand Center	Discussion Groups
Create promotional materials with our latest branding tools. Guides	Share your experiences and ideas with other members. Web ▪ Guides ▪



Ask others to give.

Regardless of the size of the gift, face to face communication is the most effective method for personal giving discussions. 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. 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).

Responses to Objections: [Handout](#) | [Fundraising Ideas](#) ▪ [Event Guide](#)

*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!



This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

RESOURCES: VIDEOS, PUBLICATIONS, AND OTHER HELPFUL TOOLS

Presentation Remarks

Foundation Giving: [Paul Harris Fellow](#) | [Multiple Paul Harris Fellow](#) | [Major Donor](#)
 Club Banner: [100% Paul Harris Fellow Club](#)

Videos to Inspire Giving

Rotary Channels: [Rotary Vimeo Videos](#) | [Rotary's Best Global Stories](#) |

Doing Good in the World & Thank You Videos

[Rotary Causes \(6 videos\)](#) | [Every Smile](#) | [They Won't Give Up](#)

Thank You [2019](#) ▪ [2018](#) ▪ [2017](#) ▪

[Transforming the World](#) | [Do Good With Us](#) | [No Limits](#) |
[Beautiful Beginning](#) | [Supporting the Foundation](#) | [Endowment Fund](#) | [Better World](#) | [People of Action](#) |
[Doing Good in the World \(18 videos\)](#) |

Eradicating Polio

[Thanks](#) | [Zero Matters](#) | [Cell Phones Closer](#) | [Drop to Zero](#) | [This Close Funding](#) | [PolioPlus](#) | [Empty Ward](#)
[Last to See](#) | [Faces](#) |
[Agents](#) | [Stick to Zero](#)
[Pakistan](#) | [Rotary Fights](#) | [Dennis Ogbe](#)
[Tiwa Savage](#) | [Jack Nicklaus](#) |
[Bono](#) | [Gates](#)

Resource	Description
Shop.Rotary.org	Official Rotary publications for download – order now shop.rotary.org
Ways to Raise Money	53 ways to raise \$1,000 from diverse income sources.
Rotary Giving Works (168) Rotary Focus Works (169)	Giving: An overview of major gift opportunities to our top priorities. Focus: Rotary's work around each of our six areas of focus.
The Rotary Foundation Resource Guide (219)	The official overview of Rotary Foundation programs and services, including definitions on recognition, information the Foundation funding model, and other key information for Foundation leaders.
Individual Contribution Form (123)	The official form designed to accompany contribution sent by mail or fax to The Rotary Foundation. Includes mailing addresses.
Multiple Donor Form (095)	Facilitate gifts on behalf of others in your club with their permission.
Sharing Our Impact	Weekly: Thoughts Messages ▪ Event Banners ▪ Successful Global Grants ▪

ROTARY DIRECT: ROTARY'S RECURRING GIVING PROGRAM

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

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. [Presentation](#) - [FAQ](#)

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.

New Self-Service Feature

Manage your recurring giving at any time by signing in to My Rotary and going to Donor Self-Service.

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 can select to make a gift every month, quarter, or year on the 1st of the month.

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

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.

Tracking Rotary Direct Use

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

ROTARY DIRECT
Rotary's recurring giving program

ROTARY DIRECT SAVES...

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

There are four ways to enroll in Rotary Direct:

Online: rotary.org/direct
By mail: Rotary Direct, 17th Floor, Annual Giving
 6100 Rotary Center
 1560 Sherman Avenue
 Evanston, IL 60201-3898 USA
By phone: +1-866-976-8279
By fax: +1-847-328-5200

Manage your recurring giving at any time by signing in to My Rotary and going to Donor Self-Service.

YES! I INTEND TO GIVE US DOLLAR 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: _____

GIFT DESIGNATION (choose 1):
 Annual Fund - 3660 Rotating Peace Rotating Peace
 PolioPlus Rotating Peace Rotating Peace
 Rotary Foundation Rotating Peace Rotating Peace

RECURRING GIFT AMOUNT (minimum US\$10)
 \$25 \$50 \$100 \$250 \$500 Other _____
 Currency (if not USD): _____

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: ____/____ C/VN: _____
 Signature: _____

Contributions are for official Rotary purposes unless otherwise stated. For security purposes, please do not send cash and contributions via email.
 *Note: By checking this box, donor notifies the Rotary Foundation of their intention to contribute US\$100 or more every Rotary year to the Annual Fund or PolioPlus Fund (not more at rotary.org/give).
 Your privacy is important to Rotary International and The Rotary Foundation collectively. "Rotary" and the personal data you share with Rotary will only be used for official Rotary business, such as for Rotary fundraising purposes, financial processing, donor recognition, and record keeping. Personal data collected with this contribution is subject to Rotary's Privacy Policy found at rotary.org/privacy.

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, Disaster Response 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.

The term “when financially able” allows for 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.

Ways to Join



Visit the PHS page [to join](http://www.rotary.org/paulharrissociety) online: www.rotary.org/paulharrissociety

E-mail RotarySupportCenter@Rotary.org or call +1-866-976-8279

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. [Presentation](#) ▪ [Guide](#) ▪ [Webinar Handout](#) [Brochure \(099\)](#) [Your PHSC](#)

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.

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. [Remarks](#) ▪ [Certificate](#)

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.). *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	Jane Smith	Y	1 July 2013	Y	1 July 2015	1 July 2013	1 July 2012	1 July 2011

“**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.

“**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. An individual’s PHS eligibility will 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).





This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

RECOGNITION: INDIVIDUAL DONORS

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

<p>Rotary Foundation Sustaining Member</p> <p>When you give \$100 or more per year to the Annual Fund.</p> <p>*Use the Sustaining Member badge stickers (956) to recognize these donors in your club.</p> <p>*Use the Club Foundation Banner Report to see your Rotary Foundation Sustaining members.</p> <p>*For more on Annual Fund & SHARE, visit our web page or read the EREY brochure (957).</p>	
<p>Paul Harris Fellow</p> <p>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 Certificate Cover (PHCEN) for \$5.</p> <p>*Use the Club Recognition Summary and the History of Paul Harris Fellows to learn more about your Paul Harris Fellows.</p> <p>Note: PHFs can be a combination of cash contributions and Foundation recognition points received.</p>	
<p>Certificate of Appreciation</p> <p>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.</p>	
<p>Multiple Paul Harris Fellow</p> <p>When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.</p> <p>*Use the Club Recognition Summary to see your multiple Paul Harris Fellows.</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> ▪ 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 
<p>Paul Harris Society</p> <p>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.</p> <p>*Use the Paul Harris Society Report to see your PHS members and their PHS eligibility.</p>	

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

<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 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> <p>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>	 
<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>		

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

Bequest Society

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.

*Bequest Society members are listed on the Major Donor, Arch Klumph and Bequest Society report.

Recognition items commemorate giving at these levels:

- 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 that support 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 counted 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>For clubs where every 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>100% Every Rotarian, Every Year Club</p> <p>For clubs where every active (dues-paying) member contributes at least \$25 to the Annual Fund and the club achieves at least \$100 per capita to the Annual Fund.</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>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, or global grants within a Rotary year.</p>	
<p>100% Paul Harris Fellow Club</p> <p>For clubs in which all dues-paying members are Paul Harris Fellows. This is a <u>one-time recognition</u>. 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. 	

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

RECOGNITION: FOUNDATION RECOGNITION POINTS

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 each donor must complete and sign their own [Recognition and Transfer Request Form \(102\)](#). The points may not be transferred from individuals to a club or district. Recognition materials are shipped automatically to the club executive secretary/director (or to the club president if this position does not exist in their club) when the new level is achieved. To ship materials somewhere else, complete the "Shipping" section on the Recognition and Transfer Request Form (102) or notify the Rotary Support Center.

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 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	Joe Smith	Y	2,266	PHF +1	Jan- 2013	1,500	July 2013 AF-SHARE	Y	
428413	Jane Doe	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.

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.

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

USING FOUNDATION REPORTS



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

Somehere, 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](#)

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

REPORTS: FUNDRAISING REPORTS

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

Report	Information Available	Access	Format	Location
Donor History	Provides a comprehensive breakdown of a donor's transactions (contributions, Foundation recognition point transfers in/out, commitments and recognition) <i>Use to reconcile contributions/recognition issues</i>	Individual	PDF	My Rotary Support Center
Club Foundation Banner	Provides eligibility dates achieved for club banner recognition for current Rotary year, lists PHS membership & Rotary Direct donors	Club Leader District Leader	PDF Excel	My Rotary Support Center
Club Fundraising Analysis	Provides a 5 Rotary year of Annual Fund goals, giving and recognition Use for goal setting	Club Leader District Leader	PDF	My Rotary Support Center
Club Recognition Summary	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 Leader District Leader	PDF Excel	My Rotary Support Center
Monthly Contribution Report	Provides contribution information by club for Annual Fund, Other Funds (global grants & PolioPlus) & Endowment Fund <i>Use to identify non-contributing clubs</i>	District Leader	PDF Excel	My Rotary Support Center
Paul Harris Society Report	Provides PHS membership data (join date, 4 Rotary year history of eligibility) Includes tab with donor contact information including email, phone and address Learn about the Paul Harris Society on page 5	Club Leader District Leader	Excel PDF	My Rotary Support Center
Foundation Banner Recognition Status	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 View 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 following the close of the Rotary year.	District Leader	PDF Excel	My Rotary (only district leadership) Support Center
District Fundraising Analysis	Provides a 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 Leader	PDF	My Rotary (only district leadership) Support Center
Recognition Report	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 Leader District Leader	PDF Excel	My Rotary Support Center

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

Program Participants & Alumni	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
---	--	----------	--------------	-----------------------------

RESOURCES: MY ROTARY & ROTARY CLUB CENTRAL

My Rotary	
Find everything you need to conduct your Rotary business Note: The desktop version must be used on newer browsers – Internet Explorer 9 or higher, Chrome, Firefox and Safari.	
Resources	Questions
Guides • FAQ Delegating club or district leader access: Guide	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 • Foundation Giving			Rotary Support Center 866-976-8279 RotarySupportCenter@Rotary.org
Task	Club Member	Club, District & Zone Leader	To Access Rotary Club Central
View Goals	✓	✓	click “My Rotary” see “My Club Snapshot” box on left, see Rotary Club Central below, click “View Goals” below
Edit Goals		✓	

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	✓	✓	✓	✓
Club Reports <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> Monthly Contribution Report PolioPlus Report 		✓	✓
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			✓	✓

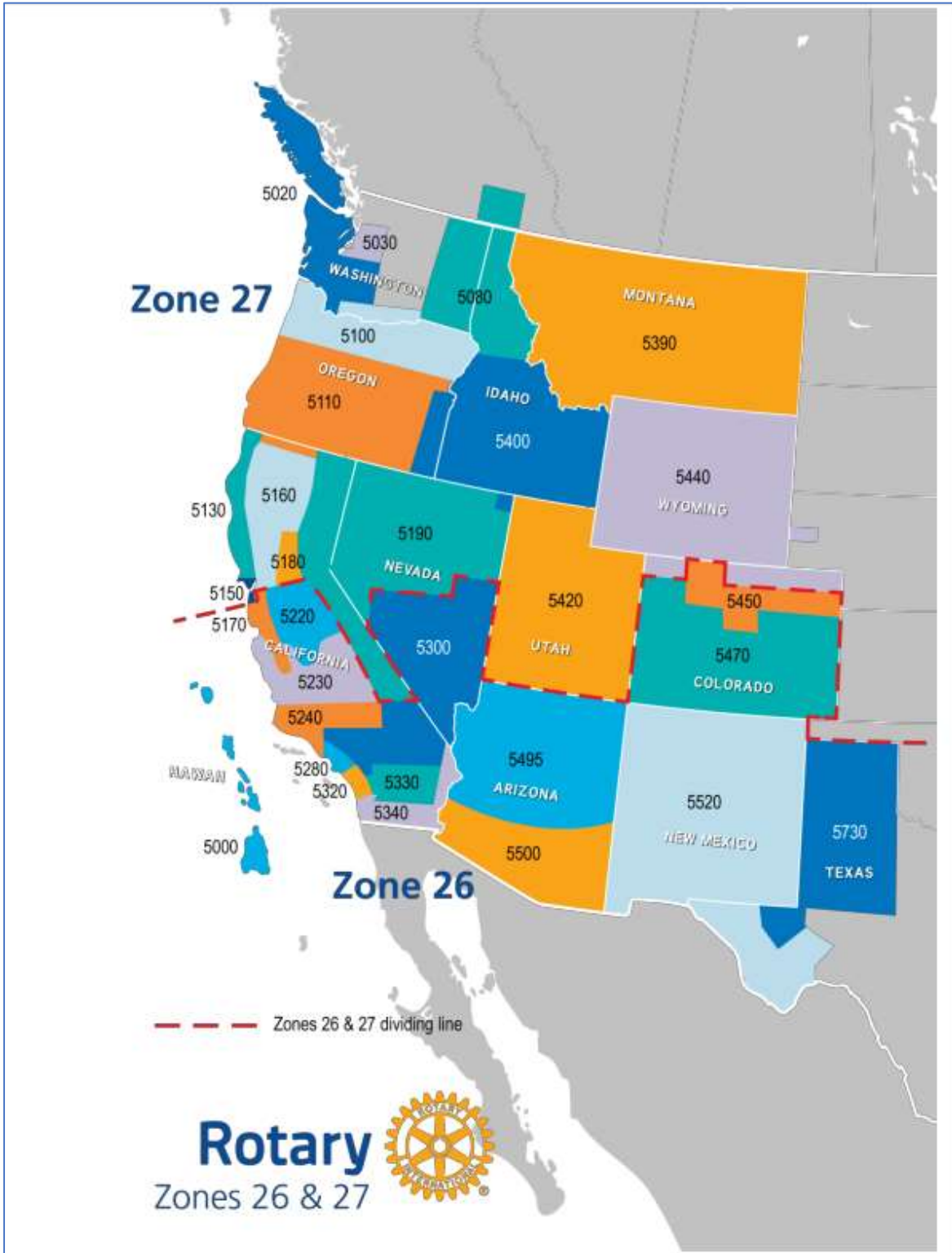
This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

HYPERLINKS

Foundation Basics	Contributions & Forms
Foundation: Reference Guide (219) Annual: Fact (159) Operations: Report Publications: List Newsletters: Subscribe Centennial: Handout	Donor History Report: Guide Matching Gifts: Web FAQ Rotary Direct: Form (US) Form (Canada) FAQ Contribution (123): Form Web Give the Gift: Form Web Multiple Donor (094): Form How to generate Paul Harris Society: Form IRA Transfer: Form Web Visions Ways to Give: Brochure (173) Memorial & Tribute: Form
Annual Giving	Manuals
Annual Fund: Brochure (957) Stickers (956) Doing Good: Video Advertisements Banners: Guide Foundation Minutes: Thoughts Messages Proud Donor: Logo	District Foundation Committee: Manual (300) Seminar: Manual (438) Grant Management: Manual Lead Your District Committee: Manual (249) Train: Manual AG: Manual (244) DG: Manual (233) Code of Policies: Link Procedure: Manual (035) Trainers Resources: Web
Planned & Major Giving	Finance, Investments & Funding Model
Major Gifts: Brochure (168) Donor Stories Arch Klumph Society: Brochure (308) Endowment Fund: Report Planned Giving: Rotary in your Estate Brochure (330) Web Donor Advised Fund: Handout Circular (382) Log In Gift & Estate Planning Program: Guide Slides	Finances and Investments: Web Funding Model: Guide Sheet
Recognition & Forms	Global Rewards
Recognition: Web Paul Harris Fellow: Form FAQ History Medallion Banners: Guide Major Donor: Form Recognition Replacement: Form	Rewards: Web Sheet Video
Alumni	Rotary Peace Centers
Alumni: Web Newsletter Reports Facebook LinkedIn	Application: Recruitment Peace Centers: Web Presentation Newsletter Leaflet (084) Guide (085) Peace is: Video What Peace Means to Me: Video Making Peace a Reality (850) Pins (089) Social Media: Facebook Blogs
End Polio Now	Grants
End Polio Now: Poster (941) Video Web Facebook Pins Fact Sheet Lighting: Guide This Close: Video Advertisements Gallery Advocacy: Flyer (943) Global Outlook (703) Webinar Global Eradication Initiative: Web Requirements Plan Polio Survivors & Associates: RAG Brochure	Econ Devel.: Guide Video RAG Sheet Vocational Training Teams: Fact Sheet Video Maternal & Child Health: Video RAG Sheet Scholarships: Fact Sheet Flier Education & Lit.: Video Guide RAG Sheet
Grants: Handout Manual Presentation Terms Staff Resources Process Tips Areas of Focus: Guide (965) Policy Statement Staff District Grants: Video Scholarship Global Grants: Video Success Scholarship Disease Prevention: Video Sheet Peace: Video RAG Sheet Water: Video Sheet	

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

RESOURCES: ZONES 26 & 27 MAP



This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

RESOURCES: FOUNDATION TEAM ROTARIANS

Zone 26 & 27 Regional Rotary Foundation Leaders		
Zone TRF Website Big West Foundation Team Bios		
Regional Rotary Foundation Coordinators (RRFC) - (zone assignments) Promote Foundation activities and fundraising		
Kevin Padilla (26) 714-305-2887 rotarykevin@att.net	Dan Himelspach (26 & 27) 303-349-5689 dg13-14@DisputeManagementinc.com	Steve Lewis (27) 775-720-5092 steve@sterling-air.com
Assistant Regional Rotary Foundation Coordinators (ARRFC) - (district assignments) Promote Foundation activities and fundraising		
Ron Mabry (5000) 540-514-6176 rlmabry@gmail.com DJ Sun (5280, 5300, 5320, 5330, 5340) 323-459-9236 djsunrotary@gmail.com Joe Grebmeier (5170, 5220, 5230, 5240) 831-585-7545 jgrebmeier@msn.com Michael Drake (5495, 5500) 520-400-5713 michael@drakelawaz.com	Barb Redder (5390, 5400, 5440) 307-680-5611 bredder@firstam.com Tom Walker (5420,5520) 505-237-0232 ftwalker1@comcast.net Carolyn Schrader (5450, 5470) 303-589-7599 schrader407@gmail.com Elaine Love (Zone Paul Harris Society Coordinator) 970-846-1311 resultsforlife@gmail.com	Bev Reed (5020,5030, 5080) 509-991-8979 bevreed1990@gmail.com Karl Diekman (5130,5150, 5160, 5180) 530-574-4470 kddiekman@aol.com LeAnn Mobley (5100, 5110, 5190) 541-944-0054 leann.mobley@gmail.com
Endowment/Major Gift Advisers (E/MGA) - (zone assignments) Increase Rotarians' participation in major gifts and building the Endowment fund		
Pam Russell (26) 619.723.3651 pdgpamo809@gmail.com	Mary McCambridge (26 & 27) 970-222-1486 marymac5440@gmail.com	Wyn Spiller (27) 530-913-6470 wyn.spiller@gmail.com
End Polio Now Coordinator (EPNC) - (zone assignments) Raise awareness for polio eradication and fundraise for the PolioPlus Fund		
Ernie Montagne (26) 520-250-4067 ernie.montagne@hotmail.com	Ken Howell (26 & 27) 208-371-3483 khowell@hawleytroxell.com	Cort Vaughan (27) 541-408-7651 jcortvaughan@gmail.com

This is not an official Rotary publication, but a resource guide compiled by your Annual Giving Officer to assist you with accessing Rotary tools.

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		
Club & District Support (for help with Rotary policy, MyRotary resources)		Membership (for strategy in improving member experience)	
James Damato Senior Supervisor 847-866-3405 james.damatojr@rotary.org		Nick Taylor Association Coordinator 847-866-3258 nick.taylor@rotary.org	
Julie Aubry Regional Membership Officer 847-866-3407 julie.aubry@rotary.org			
End Polio Now Handles fundraising questions	PolioPlus Program delivery questions	SHARE District Designated Funds (DDF)	Rotary Peace Centers Program Inquiries
Clare Monroe PolioPlus Campaign Specialist 847-424-5244 clare.monroe@rotary.org	TBD PolioPlus Coordinator polioplus@rotary.org	Steve Lyons SHARE Supervisor 847-866-3362 steve.lyons@rotary.org	RotaryPeaceCenters@rotary.org
Areas of Focus Managers Available for consultation about project design for grants	Rotary Alumni Assists with program questions	Recognition	
		Assists with Major Donor recognition	Assists with Benefactor & Bequest Society recognition
Staff Contact List	alumni@rotary.org	majordonorcoord@rotary.org	bbs@rotary.org
District & Global Grants	Major Giving Provides options for major gifts	Planned Giving Life Income Agreements, DAF	Annual Giving EREY, Rotary Direct, + PHS
27 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	Karena Bierman Director of Planned Giving 847-866-3100 karena.bierman@rotary.org	Geoff Cochran Annual Giving Officer 847-866-3195 geoffrey.cochran@rotary.org
26 Cecelia Walter Regional Grants Officer 847-424-5266 cecilia.walter@rotary.org	Beth Garrow Major Gifts Officer 847-866-3034 or 630-207-6979 beth.garrow@rotary.org		

*Eric Thompson (Major Gifts Officer) supports the following districts in Zones 26 & 27: 5390, 5400, 5420, 5450, 5470, and 5730. He can be contacted 847-866-3190, or eric.thomson@rotary.org