

THE ROTARY FOUNDATION

ROTARY DISTRICT 7690

2015 - 2016

**Rotary Foundation
Rotary District 7690
2015-16**

Foundation Advocates

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- Area III Randy Perkins (Alamance)
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- Area IV Jorge Vidal (Clemmons)
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- Area VI Dave McCoy, PDG (High Point)
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DavidMcCoy@Rotary7690.org

**Rotary Foundation
Rotary District 7690
2015-16**

Foundation Advocates

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gsogolfer@aol.com

**Rotary Foundation
Rotary District 7690
2015-16**

Committee Chairmen

District Chair	Mike Conrad, PDG (Gate City) 212 Staunton Drive, Greensboro, NC 27410 (H) 336-855-6217, (C) 336-404-0951 MikeConrad@Rotary7690.org
Endowment Fund	Patrick Eakes, IPDG (Crescent) 205 Stage Coach Trail Greensboro, NC 27409 (O) 336-574-1800 (C) 336-669-2554 patrick.eakes@cpeakes.com
Annual Fund	Charles Allen, PDG (Randolph) PO Box 623 Randleman, NC 27317 (O) 336-625-5119, (H) 336-495-1145, (C) 336-963-2428 charlesallen@rotary7690.org
Paul Harris Society	David McCoy, PDG (High Point) 2413 Addison Boulevard, High Point, NC 27262 (O) 336-887-1414, (H) 336-882-0529, (F) 336-887-7275 DavidMcCoy@Rotary7690.org
Major Donors	Stuart Fountain, PDG (Randolph) 2545 Fox Ridge Road Asheboro, NC 27205 (H) 336-857-1257 sfountain@triad.rr.com
Polio Plus	Rick Snider, PDG (Lexington) 3033 Center Street Ext. Lexington, NC 27295-5563 (H) 336-249-4502, (C) 336-250-9573 Rsnider18@gmail.com

**Rotary Foundation
Rotary District 7690
2015-16**

Committee Chairmen

Global Grants	Rusty Hunt (Lexington) PO Box 1287 Lexington, NC 27293-1287 (O) 336-224-4650, (H) 336-956-3904, (C) 336-240-0426 rhunt@davidsonccc.edu
District Grants Co-Chair	Dona Neal (Kernersville) PO Box 562 Summerfield, NC 27358 (H) 336-643-4114, (C) 336-317-2895 dwneal1017@gmail.com
Co-Chair	LeeSa Cornelius (Yadkinville) 709 Carolina Avenue Yadkinville, NC 27055 (H) 336-849-4103, (O) 336-679-8861, (C) 336-399-7317 LeeSa.Cornelius@gmail.com
Scholarships & Peace Fellows	Jim Kennedy (Gate City) 3200 Timberoak Ct. Greensboro, NC 27410 (H) 336-288-0044, (C) 336-404-1614 jkennedvcma@bellsouth.net
Vocational Training Teams (VTT)	Mike Sigmon (Summit) 321 Smyres Place Greensboro, NC 27403-1229 (O) 336-274-6952, (H) 336-275-9059, (C) 336-337-0100 msigmon@brandel-stephens.com
Audit/Stewardship	Tim Hansen (Greensboro Airport) Don Allred, PDG (Midstate) Mary Joan Pugh (Asheboro)

Rotary Foundation Rotary District 7690

Important Dates 2015-16

Rotary Foundation Seminar – Saturday, September 12, 2015 Areas 3, 6, 8, 9 & 10 AVS Banquet Centre	Asheboro
Rotary Foundation Seminar – Thursday, September 24, 2015 Areas 1, 2, 4, 5 & 7 Village Inn and Conference Center	Clemmons
Paul Harris Society Recognition – Tuesday, October 6, 2015 Proximity Hotel Keynote by Past RI Director Barry Rassin	Greensboro
Rotary Foundation Banquet – November 11, 2015 Koury Convention Center Sheraton Hotel Keynote by RI Director Jennifer Jones	Greensboro
Grants Management Seminar – Thursday, February 25, 2016 Areas 1, 2, 4, 5 & 7 Village Inn and Conference Center	Clemmons
Grants Management Seminar – Saturday, February 27, 2016 Areas 3, 6, 8, 9 & 10 AVS Banquet Centre	Asheboro

ROTARY FOUNDATION ACHIEVEMENTS

ROTARY DISTRICT 7690

8093 PAUL HARRIS FELLOWS (as of 8/15/15)

2173 SUSTAINING MEMBERS – 84.2% OF OUR ROTARIANS (in 2014-15)

1819 BENEFACTORS (as of 8/15/15)

127 MAJOR DONORS (as of 8/15/15)

181 BEQUEST SOCIETY MEMBERS (as of 8/15/15)

117 PAUL HARRIS SOCIETY MEMBERS (as of 8/25/15)

43 100% SUSTAINING CLUBS (in 2014-15)

42 EREY CLUBS (2014-15)

3 ARCH KLUMPH SOCIETY MEMBERS (as of 8/15/15)

First District in the World for 100% Paul Harris Fellow Clubs – All 52 Clubs!!!

Top District in the Rotary World for 100% Sustaining Clubs in 2005-06, 2006-07, 2007-08, and 2008-09

Top District in the Rotary World in Charter Bequest Society Members (68)

The Only District in the Rotary World with (14) "Triple Crown Clubs"

Pioneer Peace Scholarship District at the Inception of the Peace Fellow Program

Peace Builder District for Ongoing Support of the Peace Fellow Program

In 2014-15, we gave a total of \$1,208,448 to The Rotary Foundation

All Time Giving of Over \$ 14.2 Million

**Rotary Foundation Goals
Rotary District 7690
2015-2016**

Annual Program Fund

- **All clubs are encouraged to reach 100% Sustaining status...goal to lead the Rotary world (World Class Clubs)**
- **All clubs are encouraged to *maintain true* 100% Paul Harris status**
- **The addition of two new Triple Crown Clubs**
- **Add 30 new Paul Harris Society(PHS) members by 6/30/16**
- **8 new Major Donors**
- **A 10% net increase in giving to the Annual Fund from the 2014-15 Rotary year**

Endowment Fund

- **Current Triple Crown Clubs re-attain 100% Benefactor status**
- **The addition of two new 100% Benefactor Clubs**
- **10 new Bequest Society Members**

Polio

- **All clubs contribute to PolioPlus**

Grants & Vocational Training Teams (VTT)

- **Clubs are encouraged to participate in District, Global Grant and Packaged Grant opportunities**
- **Clubs are encouraged to pursue Vocational Training Team (VTT) opportunities**

Scholars

- **1 new Global Scholar**
- **All clubs are encouraged to identify a potential Peace Fellow**
- **District maintains its status as a Peace Builder District**

Foundation Banquet

- **15% of clubs membership (spouses included) to attend the November 11, 2015 Foundation Banquet**

Foundation Committees:

- **Fill Foundation committee positions with dedicated and informed Rotarians and provide resources and guidance for them to carry out the roles and responsibilities.**
- **Continue to train and support the eleven area Foundation Advocates who will collaborate with Assistant Governors and work closely with club Foundation Chairs.**
- **Develop a *Quick Reference Guide* for Rotary Giving and Programs**

**Rotary Foundation Goals
Rotary District 7690
2015-2016**

Communicate Goals and Provide Recognition for Success:

2015

- **June – Nov.** **Foundation Advocates visit clubs to hold Foundation programs**
- **September 12** **Foundation Seminar, AVS Banquet Centre, Asheboro**
- **September 24** **Foundation Seminar, Village Inn, Clemmons**
- **October 6** **Paul Harris Society Banquet – Proximity Hotel, Greensboro**
- **November 11** **Foundation Banquet – Koury Convention Center, Greensboro**

2016

- **February** **Craft Gold Club Award Criteria using Foundation Goals**
- **February 12** **Leadership Training Day, Assistant Governors (DGE)**
- **February 25** **Pre-PETS & Grants Management Seminar - Clemmons**
- **February 27** **Pre-PETS & Grants Management Seminar - Asheboro**
- **March-April** **Foundation Advocate Training**
- **March 17 - 19** **PETS, opportunity for more Foundation programs awareness**
- **April 22 – 24** **District Conference, recognitions and education on programs**
- **May 6** **District Training Assembly, more education and promotion**

District Grants

District Grants enable District 7690 Rotarians to be **personally involved** in **projects** that benefit their local communities or the world. These grants are not intended to replace funds currently raised by the club through other means.

With this in mind, the District Grants Committee has developed the following guidelines to assist clubs in deciding whether or not a project is appropriate for a DG application.

- The project cannot be one already undertaken and in progress, activities primarily sponsored by a non-Rotary organization, or for projects that are already completed.
- Large-scale, multi-year international projects should apply for a Global Grant rather than a District Grant.
- The project must actively involve Rotarians in planning and carrying out the project, not simply in fundraising for the club's portions of the expenses.
- The project cannot directly benefit a Rotarian or family member of a Rotarian.
- The projects may be either domestic or international.
- The DG may be used for infrastructure depending on the project (see below).
- The DG must be matched at least 1:1 with a cash contribution from the club.
- Projects must be completed by May 1, 2015. Final reports and all receipts must be submitted by May 15, 2015.
- Go to www.rotary7690.org to find initial application and final report forms.
- Clubs may submit multiple district grant applications up to two times the amount listed in the Club Allocation Chart.

District Grants

The District Grant may **NOT** be used for:

- Compensation or personal services
- Purchase of land or buildings
- Some Travel expenses
- Administrative expenses
- Construction or renovation projects for facilities where people live, work, engage in gainful activity or which are used for storage, e.g. electrification, windows/doors, walls/roof, general refurbishment, HVAC, repairs of utilities, plumbing
- Fundraising activities such as a golf tournament
- “Pass through” donations to a charity

TIMELINE AND NOTES for 2015-2016 DISTRICT GRANTS

May 15, 2015	Final reports and receipts must be received for 2014-15 District Grant projects. New applications will be not be considered if a final report is outstanding.
May 31, 2015	District Grant Application period closes.
July, 2015	Clubs that applied in the initial period are notified with decisions on their applications
May 1, 2016	Projects must be completed.
May 15, 2016	Final report and all receipts must be submitted for 2015-16 District Grant projects. New applications will be not be considered if a final report is outstanding.

The A-B-C's of Global Grants

Qualification of your Club

Your club must be qualified by the district before it can apply for global grants, but qualification is simple. In order to qualify, your club must:

1. Attend a grant management seminar
2. Have the club President and President-Elect sign a Memorandum of Understanding (MOU) and submit the signed MOU to the district. The MOU is an agreement between the club and the district explaining the minimum Foundation requirements for managing grants. It ensures that your club has the appropriate controls in place to manage global grants.
3. Follow any additional district qualification guidelines, as determined by the district.

Creating a Project

Your club's global grant project must have a minimum budget of \$35,000 (see budget description below), be sustainable into future years, and you must partner with an international club or international district. Your club has great flexibility in the type of project it would like to create, but it must address at least one of Rotary's six areas of focus:

1. Peace and conflict prevention/resolution
2. Disease prevention and treatment
3. Water and sanitation
4. Maternal and child health
5. Basic education and literacy
6. Economic and community development

Before applying for a global grant, clubs should take time to create a project that includes a community assessment, strong partnership, and a detailed implementation plan with measureable, achievable goals.

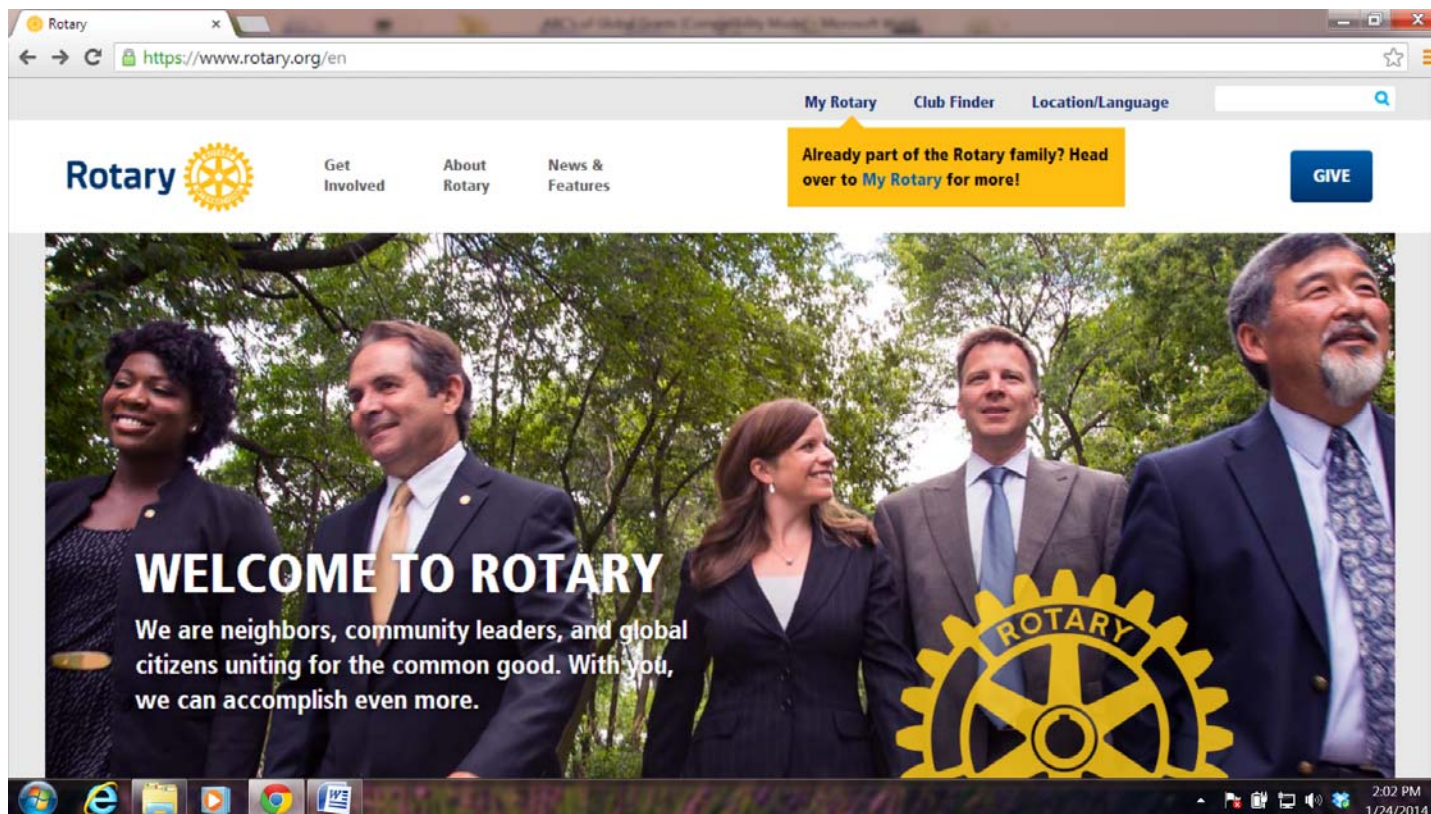
As stated above, the global grant project must have a minimum budget of \$35,000. Individual Rotarian cash contributions (i.e. contributions from your club and partner clubs within our district) must total at least \$10,000. These individual contributions are matched 100% by the District (DDF Funds) and 50% by the Rotary Foundation's World Fund. In addition, the World Fund also matches 100% of the District's match. The chart below shows this more clearly.

Amount	Description
\$10,000	Rotarian Cash Contributions
\$10,000	District Match of Rotarian Cash Contributions
\$ 5,000	World Fund Match of Rotarian Cash Contributions
\$10,000	World Fund Match of District Match
\$35,000	TOTAL PROJECT COST

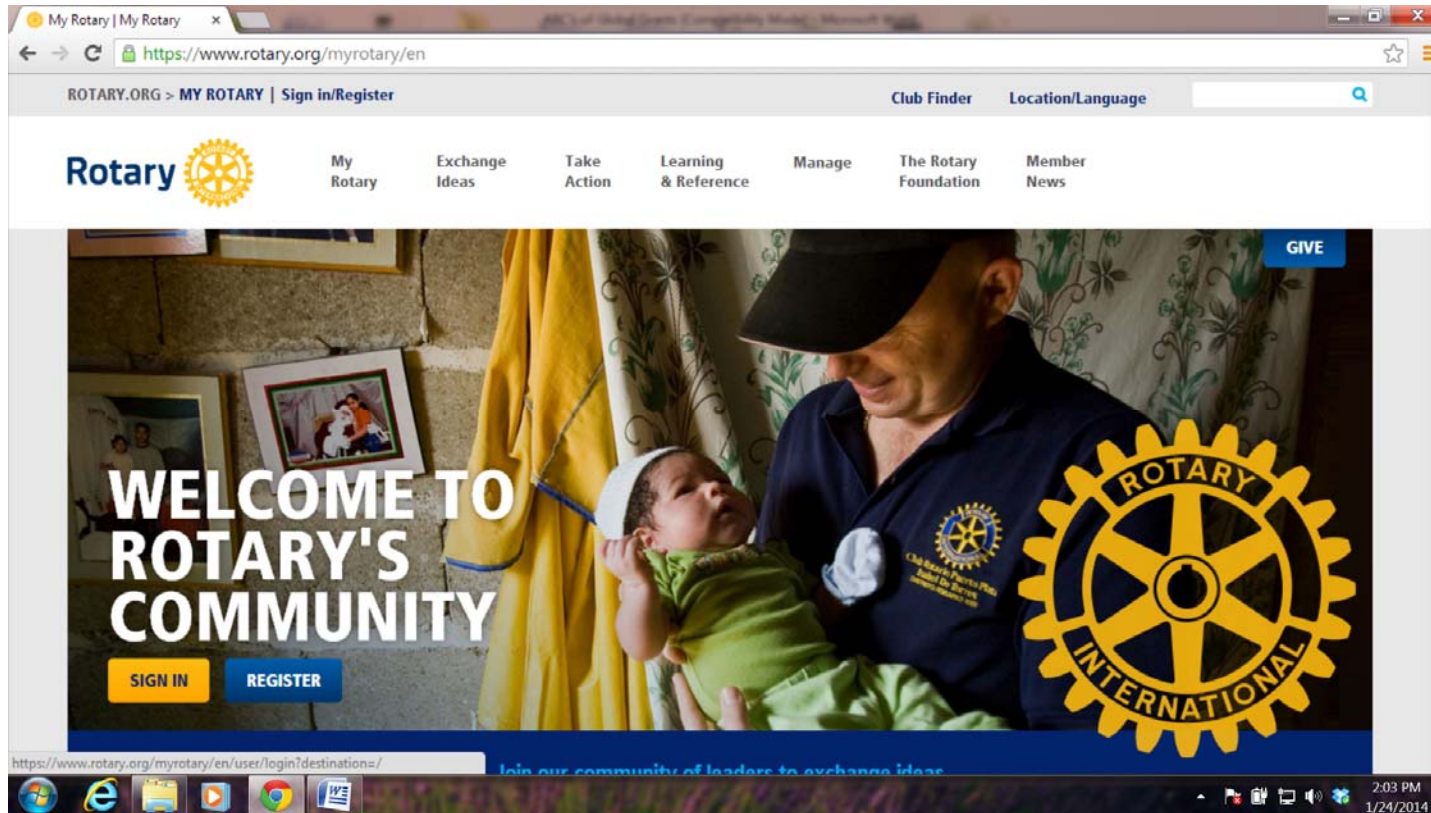
Application Process

Before completing the formal application, your club must obtain prior approval to apply for the global grant from District 7690, and must complete the District 7690 Global Grants Checklist. You can request this approval by emailing the District 7690 Global Grants Committee, and including a short summary and the budget for your proposed project. This step is necessary in order for District 7690 to ascertain that it has sufficient matching funds available for your proposed project. Once your club has received approval to proceed, you can then begin the formal application process, as described below.

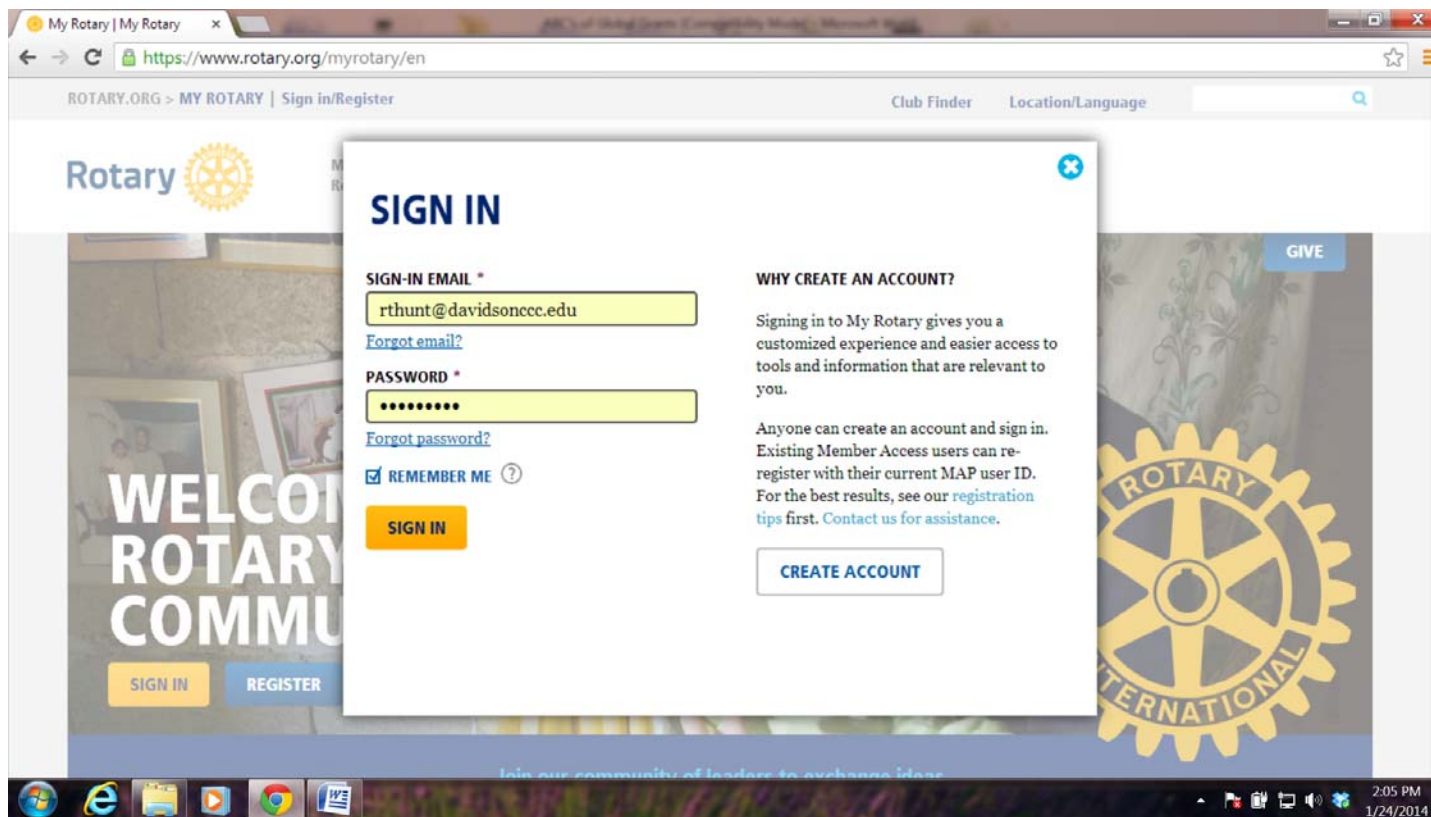
The Rotary Foundation has developed a comprehensive online application that can be accessed at www.rotary.org. When you get to the website, click on “**My Rotary**” on the top menu bar, as shown below.



The following screen will appear. Click on “Sign in/Register” on the top menu bar.

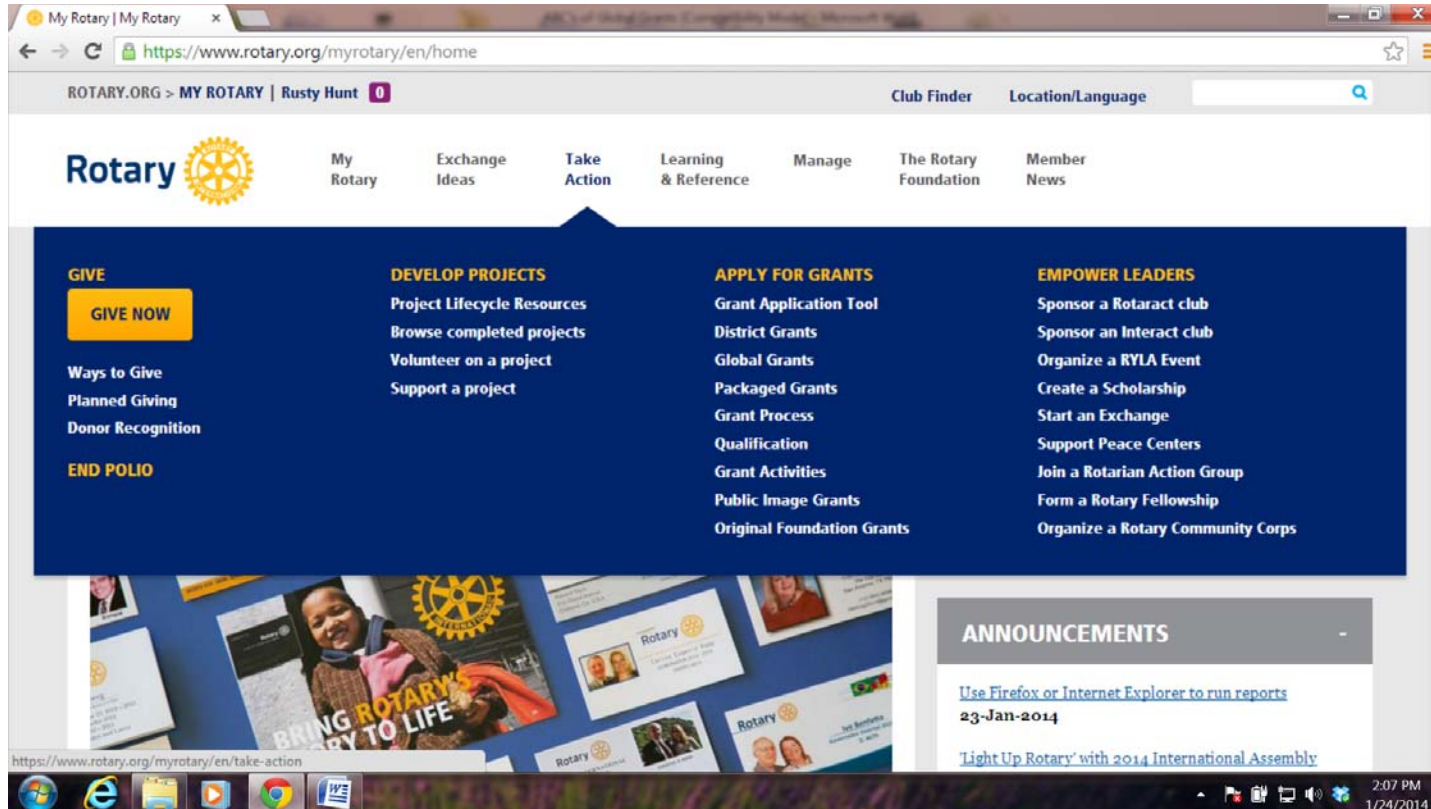


The following screen will appear. Sign in as shown below.

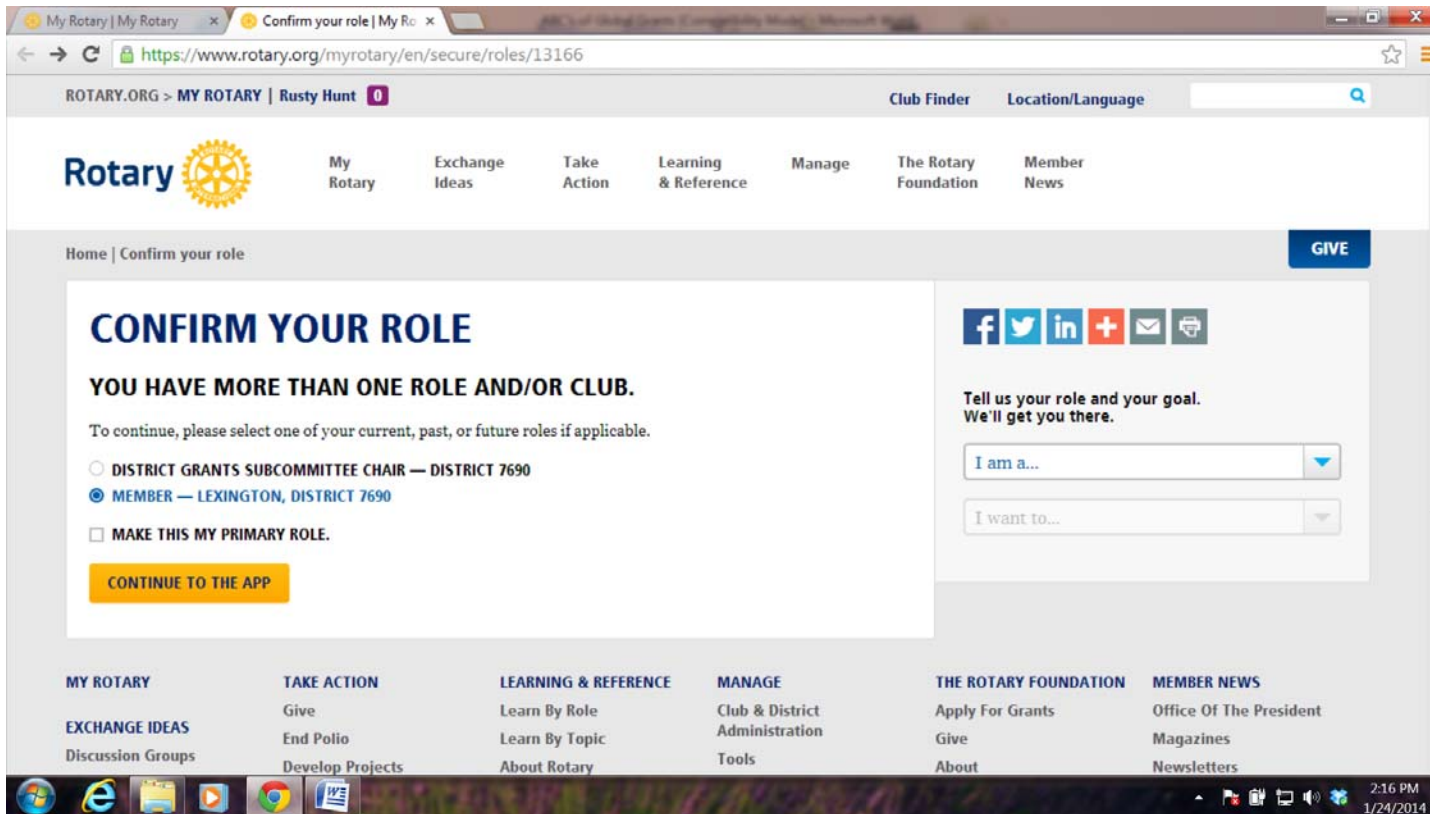


September 1, 2015

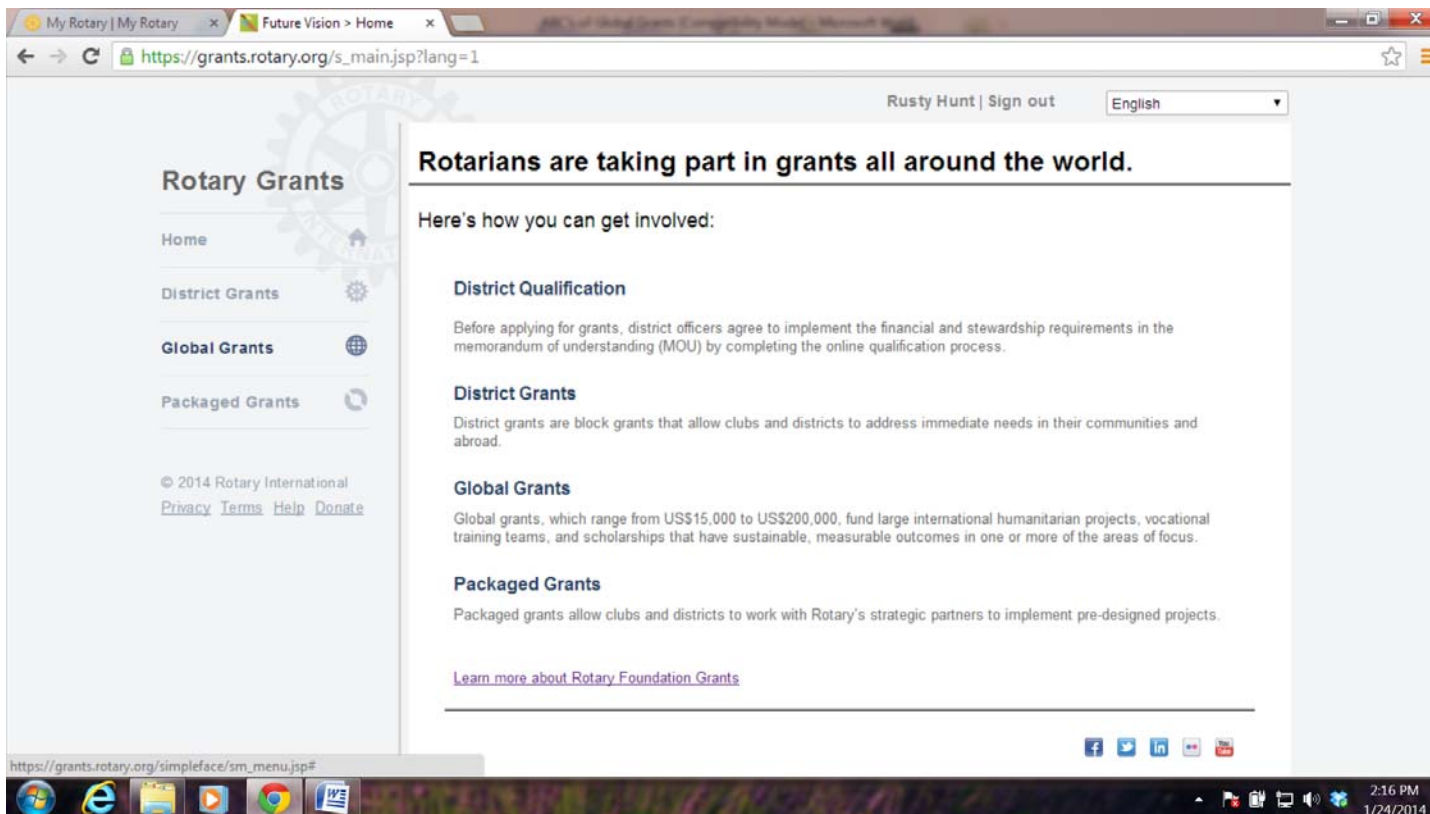
The following screen will appear. Click on **“Take Action”** then click on **“Grant Application Tool”** under the Apply For Grants section. *Also note under the Apply for Grants section that there is a link for Global Grants that provides general information about global grants and is a good resource should you need it.*



Once you click on **“Grant Application Tool”**, the following screen will appear. Click on the radio button beside your role and click the **“Continue to the App”** button below.



The following screen will appear. Click on “Global Grants” on the left hand side of the screen.



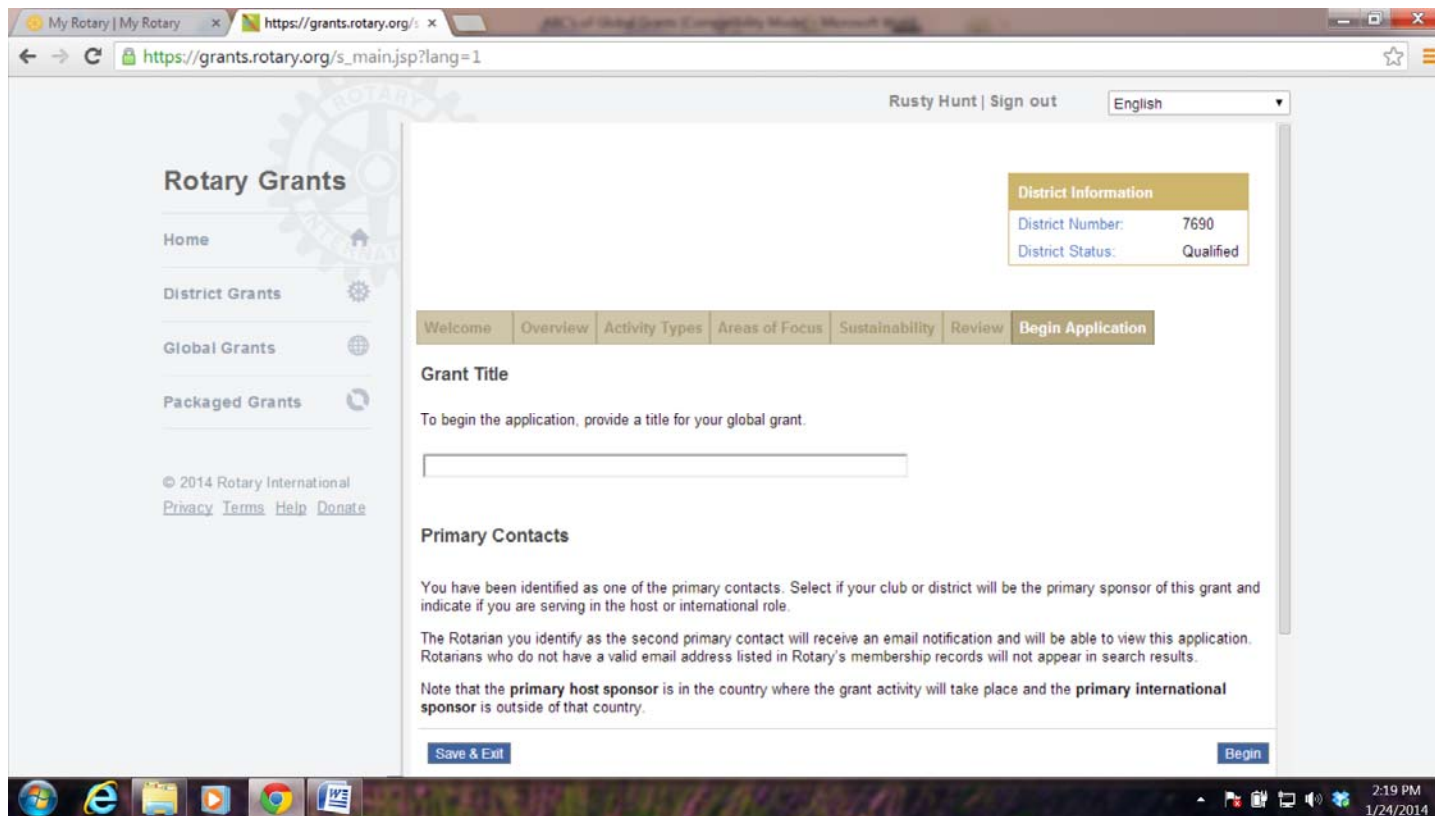
The following screen will appear. Click on the “Open” button under the First Steps section.

The screenshot shows the Rotary Grants website interface. The browser address bar displays https://grants.rotary.org/s_main.jsp?lang=1. The user is logged in as 'Rusty Hunt' and the language is set to 'English'. The main content area is titled 'Global Grants' and contains the following elements:

- District Information:** A box showing 'District Number: 7690' and 'District Status: Qualified'.
- Text:** 'Global grants, which range from US\$15,000 to US\$200,000, fund large international humanitarian projects, vocational training teams, and scholarships that have sustainable, measurable outcomes in one or more of the areas of focus. Applying for a global grant starts with First Steps, which give you an opportunity to confirm that your activity meets global grant requirements. [Read more](#)'
- First Steps:** A section with the text 'First Steps started on: 22/08/2013' and a blue 'Open' button.
- Attention Needed:** A table with columns: Grant Number, Grant Title, Status, and Report Due Date (dd/mm/yyyy). The table is currently empty.
- Application(s):** A table with columns: Grant Number, Grant Title, and Status. The table is currently empty.

The Windows taskbar at the bottom shows the system time as 2:18 PM on 1/24/2014.

The following screen will appear. This is where you actually begin entering the information for your global grant application. The application is pretty intuitive and will walk you through all the information you need to provide. For example, the first page asks for a title for your grant application and the primary contact information. Once you complete entering the information on the first page, click on the “**Begin**” button on the bottom right of the screen. At any time during the application process, you can click on the “**Save & Exit**” button on the bottom left of the screen and it will save what you’ve entered to date so that you can come back and complete the application at a later time. It is also important to note the tabs along the top of the screen (“Welcome”, “Overview”, “Activity Types”, “Areas of Focus”, “Sustainability”, and “Review”). These tabs provide valuable concise information and links to other resources (ex. videos on global grants, the Grants Management Manual, etc.) regarding global grants in case you forget any of the rules or just want to learn more.



Once you complete the application, it will be electronically forwarded to both the District and the Rotary Foundation for formal review and approval.

Oversight and Reporting

Rotary Foundation funds must be treated as a sacred trust and managed with proper stewardship. Once your Rotary Foundation Global Grant has been approved, you will receive funds to implement the grant. The keys to successful oversight are having a financial management plan and document retention plan to facilitate reporting and potential audits by The Rotary Foundation.

Project expenditures should be made by check or other traceable method whenever possible, and supporting detailed receipts must be maintained for each transaction. A general ledger must be maintained and will help your club record all grant activities. Your club should maintain a club-controlled bank account that is used solely for receiving and disbursing Foundation grant funds.

Maintaining detailed records ensures that the club complies with the club MOU, local laws, and standard business practices. Make copies of all documents to ensure that the club's activities can continue uninterrupted in case of fire or other catastrophe. Retain all documents required by the financial management plan in a location that is known and accessible to more than one person.

Grant recipients are responsible for reporting on the use of grant funds in accordance with the terms and conditions of the grant. Typically, there are interim and final reporting requirements. In addition, there are reporting responsibilities for both your club and your international partner club. It is vitally important that you contact your international partner club regularly and that they complete their obligations under the grant.

District 7690 Global Grants Committee Contact

Rusty Hunt (Lexington) – rthunt@davidsonccc.edu

ROTARY DISTRICT 7690 CULTURAL SCHOLARSHIP

Below is the timetable for the **2015-16** application process for selecting cultural scholars from Rotary District 7690.

Rotary District 7690 Cultural Scholarships – 1 up to \$10,000 will be awarded for three months of language study. The primary purpose of a Rotary Foundation Cultural Scholarship is to have the scholar gain proficiency in a foreign language and to contribute to international understanding through study abroad.

Cultural Scholars

Award up to 3 months

Must have completed at least 2 years of college.
Must have some prior knowledge of the language.
Must enroll in assigned language school.
Examples of candidates are elementary and secondary school teachers, librarians, public servants, i.e., public health, fire safety and social services counselors.
May not be a Rotarian or a relative of a Rotarian

IMPORTANT DATES TO REMEMBER – TIMELINE

July 1, 2015	Applications will be sent to each club president for cultural scholars, 2013-2014
July-October 15, 2015	Clubs recruit candidates for scholarships and receive completed applications from candidates
October 31, 2015	Deadline for applications for Cultural scholarships to be submitted to District Scholarship Committee Chair (clubs may submit more than one candidate)
November 15, 2015	Cultural Scholar Interviews (Candidates <u>MUST</u> be available on this date).

District Committee Chairman:

James (Jim) Kennedy – Chairman (Gate City) 3200 Timberoak Ct., Greensboro, NC 27410
(C) 336-404-1614 (H) 288-0044 e-mail: jkennedycma@bellsouth.net

Club Recognition Levels for Support Of Our Rotary Foundation

Every Rotarian Every Year/Sustaining Club – As of June 30, every dues paying member of a club has made a contribution of at least \$100 to Our Rotary Foundation during the preceding Rotary year. Only gifts to the Annual fund are eligible toward the \$100 minimum.

100% Foundation Giving Club – As of June 30, every dues paying member has made a contribution to Our Rotary Foundation during the preceding Rotary year and the club's total giving is at least \$100 per member to any Rotary Foundation designation.

100% Paul Harris Fellow Club – Every member of a club is a Paul Harris Fellow on a single day.

100% Benefactor Club - Every member of a club is a Benefactor on a single day.

Triple Crown Club – Every member of a club is a Sustaining member, a Paul Harris Fellow, and a Benefactor on a single day.

A-L-O-H-A

means

At Least One Hundred Annually

Rotary District 7690

The Only District in the Rotary World

With 14

TRIPLE CROWN CLUBS

CRESCENT

WILLOW CREEK

GATE CITY

THE SANDHILLS

JONESBORO

SANFORD

SAN-LEE SUNRISE

KERNERSVILLE

HILLSDALE SUNRISE

GREENSBORO AIRPORT

SOUTHERN GUILFORD NEW GENERATION

MOCKSVILLE

THOMASVILLE

TROY

WHICH CLUB WILL BE #15??

Paul Harris Society of Rotary District 7690

- 1) The Paul Harris Society pledge is for a gift of \$1000 a year. Club Foundation points may not be used to fund the PHS pledge. The full \$1000 must be paid during the Rotary year (by June 30) though it need not be done in one check. You may pay in installments. Please indicate on your commitment pledge form if you will pay in Club installments or TRF Direct.**
- 2) You don't have to be a Paul Harris Fellow first in order to become a Paul Harris Society member. If you are not already a Paul Harris Fellow, you will become one as soon as you fully fund your PHS pledge. Make your check payable to "The Rotary Foundation" and send to Margaret Padgett per the pledge form. When your pledge is fully funded, your PHF will be ordered from the Rotary Foundation and your Paul Harris Society recognition will be prepared by the District.**
- 3) With each \$1000 gift you will receive multiple PHF recognition with appropriate PHF pin and stones after your first PHF. You may also name a new Paul Harris Fellow using the recognition points from your account.**
- 4) Contributions to the Annual Programs Fund will go to fund Foundation programs. In three years the Rotary Foundation will return 50% of the District's Annual Giving to the District as District Designated Funds to be used for the Foundation's humanitarian and educational programs by the District Rotary Clubs. You may also designate a portion or all of your contribution to PolioPlus.**
- 5) All previous personal gifts to the Foundation are counted toward Major Donor recognition. Your pledge of \$1000 annually will enable you to become a Major Donor very quickly.**
- 6) A personal gift already made to the Annual Programs Fund or PolioPlus this year will count toward your Paul Harris Society pledge. For example, if you have already made a \$200 gift this year, you can become a Paul Harris Society member with an additional gift of \$800.**
- 7) The Paul Harris Society is an official Rotary Foundation program, but, all administration and recognition is at the District level. A special PHS banner will be presented to each Club when they achieve their first PHS member. Recognition of new Paul Harris Society members will be made at the Foundation Banquet as well as at the member's club.**
- 8) For further information please contact either David McCoy, District Paul Harris Society Chairman at 336-887-1414 or davidmccoy@rotary7690.org or Mike Conrad, District Foundation Chairman at 336-455-7901 or mikeconrad@rotaty7690.org**

We have learned of the Rotary Foundation's good works through its humanitarian and educational programs at our Foundation Seminars. Our gifts make those good works possible. If you have more questions, please let me know. We are eager to answer your questions and receive new Paul Harris Society pledges.

**Yours in Rotary Service
David McCoy
Paul Harris Society Chair District 7690
Ofc 336-887-1414
Fax 336-887-7275
Cell 336-259-6236
Email davidmccoy@rotary7690.org**

December 30, 2012

PAUL HARRIS SOCIETY

Yes. Count me in! It is my intention to become a member of The Paul Harris Society of District 7690 by donating \$1,000.00* or more each year to the Annual Programs Fund of Our Rotary Foundation. I understand I may discontinue my membership in the Society based on a change in my financial condition.

____ Enclosed is my initial gift of **\$1,000.00** designated for the Annual Programs Fund.
(Make check to The Rotary Foundation. Do not send cash.)
____ Check if you wish to be reminded annually of your due date for renewal.

If you wish to pay in installments, you can do so thru TRF Direct or through contributions directed through your Club. Please indicate: TRF _____ DUES _____

Signature: _____ **Date:** _____

*All gifts count towards Multiple Paul Harris Fellow Recognition and Major Donor Recognition.

Please credit this gift as follows: (please print)

Name _____ Membership Number _____

Street _____

City _____ Zip _____

Daytime Telephone _____ Fax: _____

E-mail _____

Rotary Club of _____ Club Number _____

District 7690

Please send this completed form and check to:

David McCoy

2413 Addison Blvd

High Point, NC 27262

Recipient of the PHF recognition: _____

If this contribution makes you a Multiple PHF, you (as the donor) can name the individual you would like to have recognized (recipient of a PHF) with each additional \$1,000 contributed.

Note: A copy of this Rotary Foundation Recognition form will be returned to you to confirm transmittal of your contribution to The Rotary Foundation. Please give the copy to your Foundation chair for recording of your giving to the Foundation and for your receiving PHF recognition. THANK YOU!

Annual Fund and Endowment Fund - A Comparison

<u>Amount</u>	<u>Annual Fund</u>	<u>Endowment Fund</u>
	Principal is not used for 3 Years	Principal is never used (Endowment)
\$1,000	Paul Harris Fellow	Benefactor
\$10,000	Major Donor (cumulative or single gift)	Bequest Society (promised) Major Donor (cash)
\$1,000 Every Year	Paul Harris Society	
Type of Gift	Cash, Check, CC Gift of Stock	Cash, Check, CC Codicil or Insurance Gift of Stock Charitable Gift Annuity

What Your Gift Can Do

- *Your US\$100 gift to the Annual Programs Fund provides:*
 - Text books for one elementary school in Zambia
 - Cataract operations for three blind individuals in India
 - Mosquito netting for (35) to help prevent the spread of malaria in Bangladesh
- *Your US\$500 gift to the Annual Programs Fund provides:*
 - Carpentry tools for a vocational workshop that trains (150) deaf children per year in Gambia
 - Five small sewing businesses to give poor mothers in Mexico the ability to lead more self-sufficient lives
 - A watch repair mini-business for six disabled workers in the Philippines
- *Your US\$1000 gift to the Annual Programs Fund provides:*
 - Materials to construct a deep borewell in India, supplying clean water to more than (300) people
 - Establishment of a tree nursery in Jamaica that will produce 5,000 tree seedlings annually and increase family income for 700 farmers
 - Parasite and anemia prevention materials for needy children in Brazil

MAKING A CONTRIBUTION ON LINE AT THE ROTARY WEBSITE

Many Rotarians enjoy the simplicity of making their contributions to the Rotary Foundation on line. It's a very easy and secure process. All that is needed is a valid credit card number and access to the Rotary website.

The contributor will receive an email receipt within a few minutes of making the contribution. The contributor should save the email receipt on his/her computer, forward a copy of the receipt to the club secretary for club record keeping, and print a copy for his/her permanent tax records. The entire process is complete within five minutes.

The following are the steps to follow to make an on line contribution:

Go to www.Rotary.org

Click on My Rotary at the top of the screen, then click on My Rotary in the drop down box

Click on the yellow GIVE box on the right side of the screen

Select the fund to which you want to make a contribution**

If you select the Annual or Endowment Fund, be sure to choose the SHARE option

At some point, you will be asked log in using your Email Address and Password
(Click on Create Account if you have not previously registered)*

* If you have not registered at the Rotary web site previously, you will create an account with your email address and a password. To set up the on line account, you will need your district number (7690), your club name, and your member number (consult the district database, your club secretary or find this number on the mailing label of The Rotarian).

** Most on line contributions will be made to the Annual Fund. However, some donations will be made to the Endowment Fund (Benefactor), Polio Plus, or a Global Grant. If in doubt, check with your club's Rotary Foundation chairman or your Foundation Advocate.

**PLEASE NOTE THAT ONLY GIFTS TO ANNUAL FUND – SHARE OR
ENDOWMENT FUND-SHARE WILL RETURN MONEY TO OUR DISTRICT
FOR CLUBS TO USE.**



TRF GLOBAL CONTRIBUTION FORM

Thank you for your contribution to The Rotary Foundation of Rotary International. Contributions enable The Rotary Foundation to fund projects and programs that improve and invigorate the lives of people around the world and enhance international friendship and understanding.

To help us to serve you better, please complete all applicable sections of this form when making a contribution.

I. CONTRIBUTION DETAILS

Please make your check/bank transfer payable to The Rotary Foundation. To make a gift of stocks, please contact Gift Administration at 847-424-5345 for instructions. The following credit cards are accepted: Visa, MasterCard, American Express, Discover, and Diners Club. Do not send cash.

All gifts are designated to the Annual Programs Fund (unrestricted) unless otherwise indicated.

Changes to the gift designation must be requested within 90 calendar days of your gift receipt date within the current Rotary year.

Contributions to

- Annual Programs Fund are eligible for district *SHARE* credit.
- Permanent Fund, TRF's Endowments are held in perpetuity.
- PolioPlus support the ongoing efforts to eradicate polio.
- An approved Matching or 3-H Grant must include a grant number. Contributions without a grant number will be credited to the World Fund.

Contributions to the Annual Programs Fund are eligible toward Rotary Foundation Sustaining Member, Paul Harris Fellow, EREY, Multiple Paul Harris Fellow, Paul Harris Society, and Major Donor recognition. Donors of US\$1,000 to the Permanent Fund will automatically receive Benefactor recognition.

II. DONOR OF CONTRIBUTION

Receipts will be sent for contributions of \$25 or more. The donor can be a person, Rotary club, Rotary district, company, foundation, or other organization. Contributions are tax deductible where permissible by law.

III. RECIPIENT OF RECOGNITION

Recipients of Paul Harris Fellow Recognition credit can be named at the time of the gift or at a later time by request from the account holder or club president.

IV. SHIPPING ADDRESS

The Rotary Foundation provides a number of different forms of recognition to show appreciation to individuals for outright contributions to support its humanitarian and educational programs. All other recognition items are automatically generated based on an outright gift and/or cumulative total unless you select the "Please do not send recognition" box. You may indicate where you would like the recognition item mailed to by completing this section. If this section is not completed, all recognition items will be mailed to the club president.

See www.rotary.org for more information and pictures of all donor recognition items.

V. RECOGNITION POINTS TRANSFER

Once a person becomes a Paul Harris Fellow, every dollar he/she donates above the initial \$1,000 gets a Foundation Recognition Point (FRP) that he/she can give to another person. FRPs are only derived from cash contributions made after becoming Paul Harris Fellows.

If you have questions regarding recognition or contributions to The Rotary Foundation, please contact TRF Contact Center at 866-9ROTARY (866-976-8279), or e-mail erey@rotary.org, or contact the RI international office that services your area.

PLEASE SEND YOUR CONTRIBUTION TO THE APPROPRIATE ADDRESS

United States The Rotary Foundation 14280 Collections Center Drive Chicago, IL 60693 USA	Germany Rotary Deutschland Gemeindienst e. V. Breite Strasse 34 40212 Düsseldorf Germany	RI Europe and Africa Office Witikonstrasse 15 CH-8032 Zurich Switzerland	RI Korea Office Room 705, Miwon Building 43 Yoido-dong, Yongdungpo-gu Seoul 150-733 Korea	RI Southern South America Office Florida 1, Piso 2 1005 Buenos Aires, CF Argentina	RI in Great Britain and Ireland (RIBI) Office Kinwarton Road Alcester Warwickshire B49 6PB England
Canada The Rotary Foundation (Canada) Box B9322, P.O. Box 9100 Postal Station F Toronto, ON M4Y 3A5 Canada	RI Japan Office NS3 Building 1F 2-51-3 Akabane, Kita-ku Tokyo 115-0045 Japan	RI South Asia Office Thapar House 2nd Floor, Central Wing 124 Janpath New Delhi 110 001 India			
	RI Brazil Office Rua Tagipuru 209 01156-000 São Paulo, SP Brazil				
				RI South Pacific and Philippines Office McNamara Centre, Level 2 100 George Street Parramatta, NSW 2150 Australia	

In countries with currency restrictions, please contact your district Rotary Foundation committee chair or RI international office for the address to send contributions.



TRF GLOBAL CONTRIBUTION FORM

INDIVIDUAL COMPLETING THIS FORM

Name _____
 Daytime Telephone (____) _____ Date _____
 E-mail _____

I. CONTRIBUTION DETAILS

Do not send cash. Please disregard options that do not apply in your country.

Amount of New Contribution _____

Type: *(please check one)*

- Check enclosed (payable to The Rotary Foundation)
 Visa MasterCard American Express
 Discover Diners Club
 Wire transfer

Credit Card # _____
 Expiration Date _____
 Name as it appears on credit card _____

Date _____ Signature _____

Designation: *(please check one)**

- Annual Programs Fund (eligible for SHARE)
 Permanent Fund World Fund (Benefactor recognition only)
 Permanent Fund SHARE (Benefactor recognition only)
 Humanitarian Grant # _____ NUMBER IS MANDATORY
 World Fund

Note: Changes to gift designation can only be requested within 90 days of gift receipt date within current Rotary year.

II. DONOR OF CONTRIBUTION (receives donor credit and gift receipt)

- Person Club District Business/Foundation Zone

Name (Mr., Mrs., Ms., Dr.) _____ CIRCLE FAMILY NAME OF PERSON

ID # _____ IF UNKNOWN, LEAVE BLANK

Address _____

City _____ State/Prov. _____

Country _____ Postal Code _____

- Check here if this is a new address.

Daytime Telephone (____) _____

Rotary Club of Donor _____

Club Number _____ District _____

III. RECIPIENT OF PAUL HARRIS FELLOW RECOGNITION CREDIT

- Memorial PHF Certificate of Appreciation (Business only)

Name (Mr., Mrs., Ms., Dr.) _____ CIRCLE FAMILY NAME OF PERSON

ID # _____ IF UNKNOWN, LEAVE BLANK

Address _____

City _____ State/Prov. _____

Country _____ Postal Code _____

Rotary Club of Recipient _____ IF NOT A ROTARIAN, LEAVE BLANK

Club Number _____ District _____

IV. SHIPPING ADDRESS

Processing time for recognition is four to six weeks from receipt of application.

- Please do not send recognition.

Presentation date _____

Rush requests may incur shipping charges.

Please send recognition items to: Club president Other, fill in information below

Name _____

Address _____

City _____ State/Prov. _____

Country _____ Postal Code _____

Telephone (____) _____

V. RECOGNITION POINTS TRANSFER

If this contribution is being "matched" or supplemented with Foundation Recognition Points from a club, district, or individual, please complete the appropriate spaces below.

Foundation Recognition Points from:

Club Amount _____ District Amount _____

Individual Amount _____ ID # _____

Authorized Signature _____

If there are multiple transfers of recognition, please complete a *Recognition Transfer Request* (102-EN).

Please retain a copy for your records.

WHERE TO SEND THE MONEY!

Please send contributions by check to:

**The Rotary Foundation
14280 Collections Center Drive
Chicago, IL 60693**

Please send non-contribution items to the address below. This includes requests for Paul Harris Fellows, transfers of Foundation Recognition Points for Paul Harris Fellows, corrections to accounts and reports, completed Bequest Society and Benefactor forms, and any other general correspondence.

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

For contributions for several members at once, please use a Multiple Donor Form (see attached page) or a Rotary Foundation Transmittal Sheet to list the club members' names, member numbers and the amount of the contribution on the form. The transmittal sheet can be generated by doing the following:

www.Rotary7690.org

Log into the District Database

Click Reports on the top bar

Select "Rotary Foundation Transmittal"

Confirm your club appears in the drop down menu

Click Icon to "Run/View this Report"

Enter information and print – select the correct fund* at the bottom

* usually the Annual Fund unless contributing to Endowment Fund/Benefactor or Polio Plus



Recognition and Transfer Request



Individual completing this form

Name _____

Daytime Telephone _____

Date _____

1 RECIPIENT OF RECOGNITION

Name _____

Membership ID # _____

Address _____

Rotary Club of _____

Club # _____

District # _____

2 TRANSFER OF FOUNDATION RECOGNITION

IMPORTANT: Complete this section if a club, district, or another Rotarian is transferring Foundation Recognition Points or Paul Harris Fellow credit.

Amount to be transferred: _____

Transfer from (choose A, B, or C):

A. _____
Individual Name

TRF ID # _____

B. _____
Club #

C. _____
District #

Signature of individual, required (sign here)

Signature of club president, required (sign here)

Signature of district governor, required (sign here)

3 RECOGNITION REQUESTED

Paul Harris Fellow (certificate, pin, and medallion)

Multiple Paul Harris Fellow (pin only)

Not eligible at this time

Multiple PHF Pin Levels (US\$):

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

Please send recognition materials to:

Name _____

Address _____

Daytime Telephone _____

Date Needed _____

Please send the completed form to:

Donor Recognition
The Rotary Foundation
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Fax: 847-328-5260
E-mail: recogchanges@rotary.org

STATE OF NORTH CAROLINA

CODICIL

COUNTY OF _____

I, _____, do make, publish, and declare this to be a Codicil to my Will dated _____.

Except as hereinafter modified, I hereby remake, republish, and redeclare my said Will.

ITEM 1

I HEREBY add a specific bequest to my Will as follows:

I bequeath the sum of \$ _____ to The Rotary Foundation of Rotary International in Evanston, IL to be added to its Endowment Fund, from which a spending portion will be used to support the Foundation's activities and programs.

IN WITNESS WHEREOF, I, _____, sign my name to this Codicil this ____ day of _____, 201__, and being first duly sworn, do hereby declare to the undersigned authority that I sign and execute this instrument as a codicil to my last will and that I sign it willingly, that I execute it as my free and voluntary act for the purposes therein expressed, and that I am eighteen years or age or older, of sound mind, and under no constraint or undue influence.

Signature of Maker (SEAL)

We, _____ and _____, the witnesses, sign our names to this instrument, being first duly sworn, and do hereby declare to the undersigned authority that the maker signs and executes this instrument as a codicil to his/her last will and that s/he signs it willingly, and that each of us, in the presence and hearing of the maker, hereby signs this codicil as witness to the maker's signing, and to the best of our knowledge the maker is eighteen years of age or older, of sound mind, and under no constraint or undue influence.

Signature of Witness 1

Signature of Witness 2

STATE OF NORTH CAROLINA
COUNTY OF _____

Subscribed, sworn to and acknowledged before me by _____, the maker, and subscribed and sworn to before me by _____, _____, witnesses, this ____ day of _____, 20__.

My Commission Expires: _____
Notary Public

LETTER OF INTENT

FROM: _____

TO: Beneficiaries of my Estate

RE: Gift to the Rotary Foundation

DATE: _____

Dear Family,

During my lifetime, my association with my local Rotary Club meant a great deal to me. I have indicated to The Rotary Foundation of Rotary International that upon my death my estate will give \$ _____ to the Endowment Fund of The Rotary Foundation.

In order to make administration to my estate less complicated, however, I have not formally added this charitable bequest to my will. I do, however, want my wishes carried out and I am trusting and depending upon you to make the above payment to The Rotary Foundation from the assets you receive from my estate. This allows me to satisfy the pledge I made to The Rotary Foundation during my lifetime.

The payment should be sent to the following address:

The Rotary Foundation of Rotary International
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698

Signature of Rotarian

*** This is a sample of a letter of intent that should be used in lieu of a codicil if all of the estate is to be left to just the surviving spouse. It will facilitate the settlement of a simple estate.

September 1, 2015

Using the Club Recognition Summary (CRS)

The Rotary Foundation - Club Recognition Summary							Page: 1	
as of Date, Month Year								
Rotary Club, USA								
District:	1234	A	Paul Harris Fellows: 102	B	Benefactors: 2	C	All Time Giving: \$138,680.50	D
Club:	1234							
Account No.	N A M E	Club Member	Recognition Amount	Sustaining Member Date Achieved Current Year	Sustaining Member Date Achieved Previous Year	Current PHF Level	PHF Date	Foundation Recognition Pts
* 5079984	R/C of Rotary Club America, Jose	N	\$1,000.00			PHF	Jun-1988	19,425.50
5089986	Harrison, William	N	\$1,000.00					
666942	+ April, Jennifer	Y	\$2,300.00		24-May-2005	PHF+1	Jan-1989	300
5446789	Bender, Doris	Y	\$120.00					
6041820	Bredberg, Raymond	N	\$2,000.00	04-May-2006		PHF+1	Dec-2003	1000
5516652	Cameron, Casey C.	Y	\$200.00					
* 666933	Castillo, Aya	N	\$9,000.00	+		PHF+1	Jun-1986	
4369642	Chang, Dae Jong	Y	\$1,000.00		2005	PHF	Oct-04	
948411	Chapman, Cynthia	Y						
6013861	Colander, Jonathan	Y						
666975	Dominguez, Vero	N	\$1,400.00			PHF	Jun-1983	
666966	Dowling, Monroe D.	Y	\$7,320.00		31-Dec-2004	PHF+6	Jan-1982	

The CRS is available through Member Access to DGs, DGEs, District Rotary Foundation Chairs, Annual Giving Subcommittee Chairs, Club Presidents and Club Secretaries.

- A. District and Club numbers (needed to sign-up for Member Access)
- B. All-time number of Paul Harris Fellows for this Rotary Club
- C. Total number of Benefactors
- D. All-time club contributions since its inception (excluding Permanent Fund contributions)
- E. "*" indicates deceased individuals
- F. Member ID (needed to sign-up for Member Access, also printed on The Rotarian)
- G. "+" indicates that the individual is a Benefactor (has contributed \$1,000 to the Permanent Fund or made provisions in their will of at least \$1,000 benefiting The Rotary Foundation)
- H. Name of the individual (Line 1 shows name and available Recognition Points of the Club)
- I. Shows active / inactive membership status (deceased, former members and non-Rotarians with a contribution history are included on the CRS and show an "N" in this column)
- J. Shows Recognition Amount, which can be a combination of cash contributions and Foundation Recognition Points received (Recognition Points do not count toward Major Donor recognition)
- K. A "+" indicates that the actual Recognition Amount is greater than the maximum of 9,000 that can be shown on the Club Recognition Summary
- L. Displays the date on which the individual's cumulative giving to APF-SHARE reached US\$100 or more during the current Rotary year (use to track your Club's Foundation Sustaining Members)
- M. Date cumulative giving reached or surpassed US\$100 during the last Rotary Year
- N. Indicates Paul Harris Fellow or multiple PHF status
- O. Month and Year the first Paul Harris Fellow recognition was achieved
- P. Lists available Foundation Recognition Points, which can be transferred to other individuals to help them achieve their first or multiple Paul Harris Fellow recognition. Foundation Recognition Points start to accumulate 1:1 for every dollar contributed once PHF status is achieved



Using the Club Recognition Summary (CRS)

Using Foundation Recognition Points to increase contributions to The Rotary Foundation

Foundation Recognition Points (FRP) become available 1:1 for every dollar contributed once an individual's Recognition Amount reaches 1,000. Rotarians and individuals achieve PHF status by contributing US\$1,000 outright, by receiving 1,000 recognition points from others, or through a combination of cash and points that total 1,000.

The number of FRPs a Rotarian can award to others is shown in the far right column (P) of the CRS report. Members can transfer their own FRPs by completing and submitting Form 102 (available for download at www.rotary.org). Club FRPs (shown on the first line of the report) can be transferred by having the Club President complete and submit Form 102.

TIP: Many Rotary Clubs use a matching system to help their members achieve Paul Harris Fellow recognition, and to promote additional support for The Rotary Foundation. To determine if your club is close to achieving 100% Paul Harris Fellow status, review the Recognition Amounts of all Rotarians who are currently listed as active club members (indicated by a "Y" in column I). Determine the amount needed to get all members to at least 1,000 as shown in Recognition Amount column J. Matching their contribution with Foundation Recognition Points may help you reach or even surpass your club's Annual Programs Fund goal as well as achieve 100% Paul Harris Fellow Recognition for your Rotary Club.

Promoting Annual Programs Fund support by recognizing Foundation Sustaining Members

The number of Foundation Sustaining Members can be tracked by reviewing the information in column L: the CRS will show the date when US\$ 100 or more in cumulative giving (excluding Permanent Fund contributions) are recorded for that Rotarian in the current Rotary Year. The Club Success Kit contains one sheet of *Rotary Foundation Sustaining Member Badge Stickers (956)*. Additional sheets can be ordered free of charge by visiting <http://shop.rotary.org>. To promote awareness and to recognize Sustaining Members, affix a sticker to all member name badges who become Sustaining Members during the Rotary Year.

Two Needs, Two Ways of Giving – Promoting Benefactors and Permanent Fund support

A "+" symbol in column G identifies Benefactors on the CRS report. Benefactors are individuals who have given US\$ 1,000 or more to the Permanent Fund, or who have committed US\$1,000 or more in their will to The Rotary Foundation. Rotarians can become Benefactors by completing and submitting the Benefactor Commitment Card (Form 149, available for download at www.rotary.org).

The investment earning from the Permanent Fund are already having a significant impact in helping fund Foundation programs. Supporting the Permanent Fund is a way to leave a personal legacy with Rotary, and to keep the work of Rotary financially supported for future generations. **In addition to setting an Annual Programs Fund Goal, clubs are also encouraged to set an annual goal for new Benefactors.**

THE ROTARY FOUNDATION
2007-08 FUND DEVELOPMENT
CLUB GOAL REPORT FORM

(Please return completed form to your district governor/club by 1 May 2007)

Club Name (please print) _____ District/Zone _____
Country _____ State _____
2007-08 Club President (please print) _____
2007-08 Club Treasurer (please print) _____
Title _____
Position _____
First _____ Last _____

ANNUAL PROGRAMS FUND GOAL
Your Annual Programs Fund contributions support humanitarian, educational, and cultural programs both locally and internationally. Personal outright contributions, club fundraisers, and other resources are encouraged to achieve club goals. Calculate your club's Annual Programs Fund goal by multiplying the number of members in your club by a per capita figure appropriate to your club.

of 2007-08 CLUB MEMBERS: _____
AVERAGE AMOUNT PER MEMBER: US\$ _____
2007-08 APF-SHARE GOAL: US\$ _____
(Club members x per capita goal)

PERMANENT FUND & MAJOR GIFTS GOALS
Indicate the number of club members interested in making an outright gift of US\$1,000 or more and those interested in including the Permanent Fund in their estate plan.

Number of new Major Gifts: _____
(Minimum US\$1,000 outright gift)

Number of new Benefactors: _____
(Minimum US\$1,000 outright gift or commitment in estate plan)

Number of new Benefactors: _____
(Minimum US\$1,000 commitment in estate plan)

The Rotary Foundation of Rotary International (07506)
One Rotary Center
1600 Sherman Avenue
Evanston, IL 60201-3600 USA
Phone: 847-866-3325 Fax: 847-838-2500 E-mail: enr@rotary.org
www.rotary.org

Web Copy - 6/07/governor/club to RIF Web Copy - 6/07/governor/club Value Copy and form within - Rotary 4/04



Other Resources

Our Rotary Foundation's Contact Center answers questions posed by Rotarians in the United States via telephone (**1-866-976-8279**) or email (Contact.Center@Rotary.org). The Contact Center is available only in the USA and enables Rotarians to get their Foundation questions answered promptly.

The Center is staffed by Foundation personnel experienced in Humanitarian and Educational programs as well as Fund Development. Rotarians seeking contribution reports, questions on Matching Grants, Paul Harris Fellow recognition, and other general Foundation questions should use the Contact Center first.

Club presidents, club secretaries, club Rotary Foundation chairs, and Assistant Governors are able to access club's Rotary Foundation records (assuming those officers are registered in their positions at Rotary International). Access to club records is a good way to verify contributions sent by the club have been posted. Those records are also helpful for clubs pursuing 100% Sustaining or EREY recognition.

Go to www.Rotary.org

Click on My Rotary, then click on Sign In on the next screen

Enter User Name and Password**, then hit Sign In

Move your cursor over The Rotary Foundation, then click on Foundation Reports

Scroll to the District Reports section, Contributions & Recognitions sub-section

Click on Club Recognition Summary or EREY Eligibility Report

For Club Recognition Summary

Ensure the correct Rotary club name is listed in the upper right

Choose either Members (all in history) or Club Members (current members)

This will generate the report for your viewing

For EREY Eligibility Report

Double click Rotary year you want (usually the current one), then click Run Query

This will generate the report for your viewing

** Please use your club president's, secretary's, treasurer's, or Foundation chair's logon info