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SUCCESS BOOKLET

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The Rotary Foundation of Rotary International
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www.rotary.org

Every Rotarian, Every Year

Every Rotarian, Every Year aims to engage every Rotarian in the life-changing programs of our Rotary Foundation. The purpose of this initiative is to

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

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

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

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

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Every Rotarian, Every Year

Club Schedule

continued

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

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

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

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

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

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

July: Open each club meeting with a Rotary Foundation Thought. Identify prospects for lead gifts (major gifts, challenge gifts) to the Annual Programs Fund and Permanent Fund. Make your own contribution to the Annual Programs Fund toward achievement of your club's annual giving goals and annual Foundation club banner recognitions.

August: Begin planning for November Rotary Foundation Month activities. Begin monthly review of the Club Recognition Summary to ensure that member contributions are designated properly.

30 September: Submit 1st quarter Annual Programs Fund/EREY contributions to the appropriate Foundation office in order to reach 25 percent of the club's annual giving goal. Monitor your club's fundraising progress using the various contribution reports available on Member Access at www.rotary.org. Submit any corrections to gift designations within 90 days of the gift receipt date to the Foundation.

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Every Rotarian, Every Year

Club Schedule



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

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

December: Work with your club Foundation chair to review the Monthly Contribution Report, Club Recognition Summary, and EREY Eligibility Report for errors as well as progress toward the club's goal achievement.

31 December: Submit year-end contributions to the appropriate Foundation office in order to achieve 50 percent of club's annual giving goal. In countries where contributions receive tax benefits, it is important that Rotarians submit calendar year contributions before 31 December.

31 March: Achieve 75 percent of your annual giving goal. Submit contributions to the appropriate Foundation office.

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

30 June: Achieve 100 percent of your annual giving goal. Submit contributions to the appropriate Foundation office before 30 June. Complete the final review of your club's contributions to ensure accuracy of gift designation. Contributions to PolioPlus, Matching Grants, and the Permanent Fund do not count toward achievement of your Annual Programs Fund goals. All corrections must be submitted before the close of the Foundation's 30 June books (usually by 15 July).

Ongoing: Take time to regularly show appreciation to Major Donors, Paul Harris Society members, Bequest Society members, Benefactors, Paul Harris Fellows, and Rotary Foundation Sustaining Members. Average processing time for recognition is four to six weeks from receipt of application.

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Weekly Rotary Foundation Thoughts and Success Stories

continued

“What an impact this wonderful organization has had on my life! I can hold my head high and say I helped to eliminate polio, educate thousands of students, and I am helping promote peace and global understanding. I am doing all of this because I am a Rotarian!”

*Mary Q. Garrison
Rotary Club of Wilbur, Nebraska, USA
District 5650*

Educating Rotarians about the work of The Rotary Foundation is one of the most effective tools for gaining and broadening support of our Annual Programs Fund and the *Every Rotarian, Every Year* effort. The **Weekly Rotary Foundation Thought** is designed to inform our members of the many ways in which we impact the world — there’s always something new and exciting going on in Rotary.

The club president can begin the tradition by opening each meeting with a brief moment on The Rotary Foundation, but consider rotating ownership of the weekly reading among club members. In fact, didn’t Paul Harris have a similar idea about rotating?

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Weekly Rotary Foundation Thoughts and Success Stories

Week 1: The Annual Programs Fund

This week's **Rotary Foundation Thought** is about the Annual Programs Fund.

The Annual Programs Fund is the primary source of unrestricted support for The Rotary Foundation's programs in more than 160 countries. From digging clean water wells for villages in Africa to teaching basic literacy skills to children in Latin America, during any given moment in a day, thousands of Rotarians volunteer their time and expertise to ensure that all contributions given to the Annual Programs Fund are spent wisely on quality Rotary projects.

Only if every Rotarian makes a gift to the Annual Programs Fund every year will we be able to continue to do the great work of our Rotary Foundation.

Week 2: Rotary Peace and Conflict Studies Program

This week's **Rotary Foundation Thought** is about the Rotary Center for International Studies at Chulalongkorn University, Bangkok, Thailand — strengthening the leaders of today for peace.

Mid-career professionals from around the world, representing a wide variety of fields, participate in an intensive three-month certificate program at Chulalongkorn University. Chulalongkorn alumnus Richelieu Allison, regional director of the West African Youth Network, says, *"This course has been the missing link in my ability to contribute to the resolution of the numerous problems confronting my region. If I had had the knowledge I am gaining now I would have been in a better position to adequately analyze the conflicts, map out the various actors, go the extra mile, and play a major role in helping to restore peace."* This sentiment has stuck with him, as he recently wrote, *"The changes [the program] made in my life cannot be overemphasized."*

Create awareness. Take action. Make your annual gift today!

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Week 3: Matching Grants

This week's **Rotary Foundation Thought** is about how a Matching Grant can make a difference.

Last year, Rotary clubs in Brazil, Mexico, and the United States joined together in a Matching Grant project to aid the Lar das Crianças (Children's Home) in Tanabi, Brazil. This institution provides free extracurricular activities and much needed daycare for low-income families. The Matching Grant helped the Lar das Crianças purchase uniforms for all of the children. Each student also received school supplies, gym shoes, swimsuits, and caps. After the uniforms and equipment arrived, the Tanabi Rotarians noticed a drastic improvement in the students' interest in learning and participating in activities. Most important, they saw how the supplies boosted their students' self-esteem. This is just one of many examples of how the Foundation's humanitarian grants can positively affect children's lives.

Week 4: The Rotary Foundation's Programs

This week's **Rotary Foundation Thought** is about The Rotary Foundation's programs. The Foundation's founder, Arch C. Klumph, said:

"The Rotary Foundation is not to build monuments of brick and stone. If we work upon marble, it will perish; if we work on brass, time will efface it....but if we work upon immortal minds, if we imbue them with the full meaning of the spirit of Rotary, we are engraving on those tablets something that will brighten all eternity."

The humanitarian, educational, and PolioPlus programs are the monuments of the Foundation, which Rotarians should be proud to shout about from the rooftops. We will help eradicate polio, hunger, and poverty. We will help the world achieve peace. With an annual gift, you can help the Foundation build these immortal monuments of Rotary.

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Weekly Rotary Foundation Thoughts and Success Stories



Week 5: Ambassadorial Scholars

This week's **Rotary Foundation Thought** is about sponsoring Ambassadorial Scholars.

"I am confident that I am demonstrating a commitment to Rotary ideals — furthering peace and cultural tolerance — through the work that I produce." — Alissa Nicole Creamer

As a Rotary Foundation Ambassadorial Scholar, Alissa Nicole Creamer got a close-up look at how people recover from the ravages of war. While studying documentary filmmaking in Spain, she participated in a project supported by 60 Spanish Rotary clubs to fund the rehabilitation of children victimized by land mine explosions. Nearly every day for three months, Creamer visited with two Angolan children at a local hospital. She got to know their life stories, which she is now telling to the world through a documentary film she is directing.

By sponsoring and hosting Ambassadorial Scholars, Rotarians give the world hope for the future.

Weeks 6-52:

Please visit www.rotary.org to access more **Weekly Rotary Foundation Thoughts** and other *Every Rotarian, Every Year* resources. Or, enter "Foundation Thoughts" in the Search field at www.rotary.org.

Success stories are effective fundraising strategies used by Rotarians that have helped club members increase their contributions to The Rotary Foundation. To learn more about the success stories in your area, check with your district leadership team and www.rotary.org.

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Your Annual Programs Fund

Contributions at Work

continued

A US\$100 contribution helps provide

- One explorer globe for a learning center in the USA
- 25 school uniforms for girls in an orphanage in Bangladesh
- One pair of special eyeglasses for someone in Guinea-Bissau whose vision problems hindered his or her ability to work
- 20 insecticide-treated bed nets to halt the spread of malaria in Timor-Leste
- Jackets, T-shirts, and backpacks for 12 needy schoolchildren in Thailand

A US\$250 contribution helps provide

- Clean water to 138 people for the next 50 years in San Martin de las Piramides, Mexico
- School supplies for 25 children of low-income families who attend elementary and intermediate schools in the USA
- 10 DVDs regarding job search strategies for a multimedia center that helps unemployed individuals find work in Senegal
- Clean water and fodder for livestock, ensuring a year-round food supply for 60 people in a remote village in northern Thailand
- Medicine for one trip to Managua, Nicaragua, to treat individuals who have no access to medical care

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Your Annual Programs Fund Contributions at Work



A US\$500 contribution helps provide

- Dentures for one person in Nicaragua
- Holiday toys, food, and household items to three families in need in the USA
- Occupational therapy toys for a school serving 260 disabled children in South Africa
- Professional counseling and therapy to 60 abused children in the USA

A US\$1,000 contribution helps provide

- 94 small loans to 22 women in the Philippines to initiate income-generating activities to support their families
- 25 kits for cataract surgeries in Egypt
- Bio-sand water filters for 14 homes in Honduras
- One dairy cow and a few chickens for farmers to produce milk and food for orphanages in Romania
- Seven toilets for a small village in Sri Lanka

For more information, or to make your gift online, go to www.rotary.org/en/Contribute.

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Appreciation & Recognition Opportunities

The Rotary Foundation welcomes a number of opportunities to show its appreciation to individuals for personal outright contributions supporting its humanitarian and educational programs. It is critical, however, to properly designate contributions from individuals to their membership (donor) account for eligibility. Membership (donor) account numbers may be obtained from the club secretary and are also listed on the Club Recognition Summary.

Rotary Foundation Sustaining Member

A Rotary Foundation Sustaining Member (RFSM) is an individual who personally contributes US\$100 or more each year to the Annual Programs Fund. These contributions also count toward the individual's Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, and Major Donor recognition as well as toward the club's 100% Rotary Foundation Sustaining Member Club banner recognition. Present the annual *RFSM Badge Stickers* (956-MU) to contributors in appreciation of RFSM achievement.

Paul Harris Fellow and Multiple Paul Harris Fellow

Paul Harris Fellow Recognition is given in appreciation to anyone who contributes, outright or cumulatively — or in whose name is contributed — a gift of US\$1,000 or more to the Annual Programs Fund. The recognition consists of a certificate and pin, and an option to purchase a Paul Harris Fellow medallion. Multiple Paul Harris Fellow recognition is extended at subsequent \$1,000 levels (e.g., \$2,000, \$3,000, etc.) up to \$9,999. Recognition consists of a pin with additional gemstones corresponding to the recipient's recognition amount level.

Paul Harris Society

The Paul Harris Society is a district-administered recognition for individuals who elect to contribute US\$1,000 or more each year to the Annual

Annual Programs Fund — *SHARE*

Appreciation & Recognition Opportunities

Programs Fund, PolioPlus, or Humanitarian Grants Program. Individual districts handle all associated recognition for this program, and inquiries should be directed accordingly. Paul Harris Society contributions may be eligible toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, and Major Donor recognition. Contributions to the Permanent Fund are not eligible for Paul Harris Society recognition.

Major Donor

The Rotary Foundation recognizes as Major Donors individuals or couples whose combined contributions have achieved US\$10,000, regardless of the gift designation. Recipients may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level.

Arch C. Klumph Society

Donors whose cumulative giving totals US\$250,000 or more are inducted into the Arch C. Klumph Society and have their portraits permanently displayed in the Arch C. Klumph Gallery at Rotary International World Headquarters. Members receive a special certificate and wearable Arch C. Klumph Society Member pin.

Every Rotarian, Every Year Club

A club can be recognized as an Every Rotarian, Every Year Club each year with 100 percent member participation and a minimum US\$100 per capita contribution. Every active member must personally contribute and be credited with some amount to the Annual Programs Fund (APF) during the Rotary year, and the club's total APF per capita must reach or exceed \$100. This annual banner recognition is automatically awarded at the conclusion and audit of the Rotary year. Banners are mailed to the current district governor for presentation.

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100% Rotary Foundation Sustaining Member Club

This recognition is awarded annually to clubs with every active member personally contributing US\$100 or more to the Annual Programs Fund during the Rotary year and the club achieving \$100 in per capita contributions. Recognition is automatically awarded at the conclusion and audit of the Rotary year, and banners are mailed to the current district governor for presentation.

Top Three Annual Giving per Capita Clubs

Recognition is given to the top three per capita giving clubs in the district, with a minimum US\$50 per capita required. The recognition is automatically awarded at the conclusion and audit of the Rotary year, and banners are mailed to the current district governor for presentation.

100% Paul Harris Fellow Clubs

This one-time banner recognition is awarded upon request. To be eligible, every active (dues-paying) member of the club must be a Paul Harris Fellow at the time banner recognition is requested. The club's name is honored in a permanent display at Rotary International World Headquarters.

For more information:

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

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Your Annual Programs Fund Frequently Asked Questions

GENERAL EREY & CONTACT QUESTIONS

What percentage of my contribution directly supports TRF's programs?

One hundred percent of Annual Programs Fund (APF) contributions are applied to The Rotary Foundation's (TRF) programs. Contributions to the APF are invested for a period of three years. The interest accrued from that investment pays for the Foundation's administrative and fund development expenses.

Following the three-year investment cycle, 50 percent of the APF-SHARE contributions raised in your district are returned to your district in the form of the District Designated Fund (DDF). The other 50 percent goes to the World Fund to sustain Trustee-directed programs such as humanitarian grants, Group Study Exchange, and the Rotary Centers for International Studies. NOTE: Allocations of contributions returned to pilot districts participating in the Future Vision Plan may vary.

Which programs are supported by APF-SHARE/EREY contributions?

The APF is the primary source of unrestricted support for The Rotary Foundation's humanitarian and educational programs. Programs supported by APF-SHARE include Ambassadorial Scholarships; Volunteer Service Grants; District Simplified Grants; Group Study Exchange; Rotary Grants for University Teachers; Health, Hunger and Humanity (3-H) Grants; Matching Grants; and the Rotary Centers for International Studies.

How does each club set its APF goal?

Each club president-elect is asked to submit the Fund Development Club Goal Report Form to the district governor-elect at the presidents-elect training seminar (PETS). The goal should be attainable yet challenging and represent an increase in giving from the previous year. Clubs are encouraged to meet or exceed the minimum US\$100 per capita goal. When feasible, clubs are advised to submit collected contributions to The Rotary Foundation as they are received. Progress toward goal achievement may be monitored by viewing contribution reports available through the Member Access portal at www.rotary.org.

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What contributions count toward our club's APF goal?

Only contributions designated to APF-SHARE count toward the club's APF goal. Contributions to PolioPlus, Matching Grants, Permanent Fund, or other restricted giving do not count toward the goal.

How are successful clubs raising money for the APF?

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

To whom can I direct questions about our club's monthly contributions, Paul Harris Fellow Recognition, or corrections to our Club Recognition Summary?

Your district Foundation chair or district annual giving subcommittee chair can help. Foundation staff contact information is available at www.rotary.org. Click on About Us, then Contact us.

CONTRIBUTIONS QUESTIONS

With all gifts, please use your membership ID number to ensure proper credit and recognition.

How do I make my gift?

Contributions to the Annual Programs Fund may be made online, by check, credit card, or wire transfer, or through your Rotary club. For gifts of stocks, bonds, or mutual funds, please visit www.rotary.org/en/Contribute.

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Your Annual Programs Fund Frequently Asked Questions

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

TRF Global Contribution Form (123-EN) is the standard form that individuals and clubs can use for contributions made to The Rotary Foundation. This and other useful forms can be found at www.rotary.org.

For clubs submitting a single contribution on behalf of multiple donors, please complete the *Multiple Donor Form* (094-EN), also available online.

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

All Rotarians can access their personal contribution history online by logging on to Rotary's Member Access at www.rotary.org. To register, click on Member Access and enter a valid e-mail address and password. You may also contact your district Foundation leaders or Foundation staff representative for further assistance. Foundation staff contact information is available at www.rotary.org. Click on About Us, then Contact us.

Are my contributions to the Foundation credited to my Rotary club and district?

Yes, all gifts to the Annual Programs Fund are credited to the individual donor and are applied to his or her Rotary club's and district's Fund Development goals.

We made our gift to the wrong Foundation program, how do we change it?

Corrections to gift designations must be made within 90 days of the contribution receipt date within the same Rotary fiscal year. For example, a club submits its contribution to PolioPlus but it was meant for the Annual Programs Fund. The club has 90 days to request a reclassification (correction) to move the contribution from PolioPlus to the Annual Programs Fund. Club leaders should regularly review the Club Recognition Summary for any gift designation errors and report them immediately to their district leadership teams.

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

The Monthly Contribution Report

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

The Club Recognition Summary

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

The EREY Eligibility Report

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

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

Your Annual Programs Fund

Frequently Asked Questions

Club presidents and secretaries have Web access that enables them to view the updated Monthly Contribution Report for their district and the Club Recognition Summary and EREY Eligibility Report for their clubs. These reports are available for viewing in PDF files through Adobe Acrobat, a program that can be downloaded free from the Web.

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

The Rotary Foundation is a 501(c)(3) charity and may be eligible to receive corporate matching gifts from your employer if the Foundation meets the employer's charitable guidelines. Many international companies match contributions to the Foundation with employees who work in different countries. Your employer's Human Resources department can advise if your gift can be matched and provide you with the required corporate matching gift forms.

Can I contribute to The Rotary Foundation through my workplace giving campaign?

Many employers encourage their employees to contribute to charities through payroll deduction. The employer then submits these contributions to the employee's selected charity through organizations like the Combined Federal Campaign, Global Impact, United Way, or company-specific campaigns. Your employer's Human Resources department can advise if your employer participates in a workplace giving campaign.

RECOGNITION/APPRECIATION QUESTIONS

What is a Rotary Foundation Sustaining Member?

A Rotary Foundation Sustaining Member (RFSM) is a donor who contributes US\$100 or more per year to the Annual Programs Fund. A donor will not appear as an RFSM on the EREY Eligibility Report until his or her cumulative giving for the current year has reached \$100 or more.

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RFSM Badge Stickers (956-MU), included each year in the *Every Rotarian, Every Year Club Success Kit* (958-EN), should be given to members as they reach RFSM status. Additional sheets of stickers can be ordered from shop.rotary.org.

What is the Paul Harris Society?

The Paul Harris Society (PHS) is district-administered recognition for individuals who contribute US\$1,000 or more each year to the Foundation's Annual Programs Fund, PolioPlus, or Humanitarian Grants Program. Individual districts handle all associated recognition for their PHS and inquiries should be directed accordingly. PHS member contributions are eligible toward Rotary Foundation recognition programs.

Do my Annual Programs Fund-SHARE gifts count toward Paul Harris Fellow Recognition?

Yes. All gifts designated for the Annual Programs Fund-*SHARE* are eligible for and count cumulatively toward Rotary Foundation Sustaining Member, Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, and Major Donor recognition. More information on donor recognition is available at www.rotary.org/en/Contribute/DonorRecognition.

What are Foundation Recognition Points?

An existing Paul Harris Fellow is awarded Foundation Recognition Points (FRPs) in appreciation of the contributions he or she has made above the initial US\$1,000 but not yet allocated for Paul Harris Fellow Recognition. An individual receives FRPs only for contributions he or she has made after becoming a Paul Harris Fellow. Available FRPs may be transferred to another individual's Paul Harris Fellow Recognition Points. However, the points do not count toward Rotary Foundation Sustaining Member or Major Donor recognition. For more information on FRPs, visit www.rotary.org and enter "Foundation Recognition Points" in the Search field.

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Your Annual Programs Fund Frequently Asked Questions



Can I use my Foundation Recognition Points toward becoming a Major Donor?

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

Will I receive Foundation Recognition Points for my contributions to PolioPlus, the Permanent Fund, or the Rotary Centers for International Studies?

Only contributions to the Annual Programs Fund, PolioPlus, and Humanitarian Grants Program are eligible to receive Foundation Recognition Points. Contributions to the Permanent Fund are eligible for Benefactor and Major Donor recognition.

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

100% Rotary Foundation Sustaining Member Club banner recognition is awarded annually to clubs with every active member contributing US\$100 or more to the Annual Programs Fund (APF-*SHARE*) during the Rotary year and the club achieving \$100 in per capita contributions. Banner recognition is automatically awarded at the conclusion and audit of each Rotary year.

A club can be recognized annually as an Every Rotarian, Every Year Club with 100 percent member participation and a minimum \$100 per capita. Every club member must designate either all or part of their contributions to APF-*SHARE* during the Rotary year. The club's total APF per capita must also meet or exceed \$100. This banner recognition is automatically awarded at the conclusion and audit of each Rotary year.

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