

RESOURCE GUIDE FOR ZONES 25 & 26



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

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

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[EMAIL FEEDBACK](#)

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Finding the latest version of this guide:

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

FUNDRAISING: ACHIEVING SUCCESS



1. Give first & lead by example.

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

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

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

2. Acknowledge previous giving and say thanks.

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

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

Presentation Remarks	
Foundation Giving:	Paul Harris Fellow Multiple Paul Harris Fellow Paul Harris Society Major Donor
Planned Giving:	Benefactor Bequest Society • Club Banner: 100% Paul Harris Fellow Club

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

3. Educate and inspire others to give. [Resources to Educate](#)



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 gifts.



[Rotary Giving Works](#) • [Successful Grants](#) • [Centennial Brochure](#) • [Reference Sheets](#)
[Tell Your Rotary Story](#) • [Storytelling](#) • [Rotary Focus Works](#) • [Rotary Giving Works](#)

Weekly: [Thoughts](#) | [Messages](#) • [Advertisements](#) • Publications: [List](#) • Newsletters: [Subscribe](#)

Videos to Inspire Giving

Note: Use these [instructions](#) for downloading [Rotary Videos](#) from [www.vimeo.com](#)

Rotary Channels: [video.Rotary.org](#) | [Rotary's Best Global Stories](#)

Doing Good & Thank You

[Because of You](#) | [Thank You](#) | [They Won't Give Up](#) | [Do Good With Us](#)
[A Century of Doing Good](#) | [Better World](#) | [Beautiful Beginning](#)
[People of Action](#) | [Endowment Fund](#) | [No Limits](#) | [Water](#)
[Thank You](#) | [Transforming the World](#) | [Give the Gift](#) | [Every Smile](#)
[Supporting the Foundation](#) | [Sustainability](#) | [You Are Champions](#)

Eradicate Polio

[Drop to Zero](#) | [This Close](#) | [Pride](#)
[Funding](#) | [PolioPlus](#) | [Polio Free World](#)
[Why Zero Matters](#) | [Faces](#) | [Thanks](#)
[Empty Ward](#) | [Rotary Fights](#)
[Bono \(from U2\)](#) | [Bill Gates](#)

Rotary Peace Centers: A Peace Fellow's Journey: [1](#) • [2](#) • [3](#) Voices for Peace: [Video](#) • Practicing Peace: [Video](#)

Use these [instructions](#) for downloading [Rotary Videos](#) from [www.vimeo.com](#)

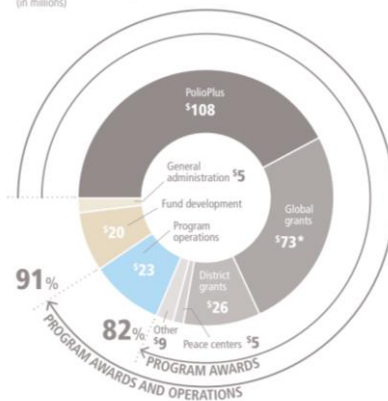


4. Committed to transparency. [Your Gift: From Start to Finish](#)

Explain our grant stewardship & 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.

"Program awards were 82 percent of total expenses, while program operations were 9 percent of total expenses. This means 91 percent of the Foundation's expenses directly supported our mission-critical programs and grants." ([Annual Report](#))

Foundation expenditures (in millions)



*Net of returned funds and other adjustments

Foundation for 2016" by the [Association of Fundraising Professionals](#). "The Rotary Foundation has received the highest possible score from [Charity Navigator](#), an independent evaluator of transparency. The ratings reflect how efficiently Charity Navigator believes the Foundation will use donations, how well it has sustained programs and services, and its level of commitment to good governance and openness." ([Webstory](#))

[Financials](#) • [Cadre](#) • [CNBC](#) • [Influential Nonprofits](#) • [Forbes](#) • [Chronicle on Philanthropy](#)

Investments: [Report](#) • [Returns](#) • [Philosophy](#) • [Sheet](#)

Funding Model: [Guide](#) • [Presentation](#) & [Notes](#) • [Video](#) • [Staff](#) • [Sheet](#)

5. Show donors impact.

Use Rotary tools to share your projects and ideas.

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

6. 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).

GIVE THE GIFT OF ROTARY AROUND THE WORLD

TAKE ACTION: Give Now

[www.rotary.org/givethesgift](#)

I want to change lives through Rotary

The gifts in this catalog show how even a small donation to Rotary can lead to life-changing projects in our six areas of focus. A monthly gift of any amount allows Rotary to do more for those in need.

Give online now at [www.rotary.org/givethesgift](#)

\$10 MIDDLETOWN RED NET
A net that traps mosquitoes in a single health center, but nets offer a safe, peaceful night's sleep.

\$25 SCHOOL UNIFORM
For students attending secondary school with limited funds. The gift of a school uniform can open the door to education for one child.

\$50 WATER FILTER
A safe, durable, built-in household device that filters out harmful bacteria and improves the taste of the water.

\$85 BOX OF PURPLE MARKERS
After children receive the purple markers, they can help create a mural. This is an effective way to show they have been received.

\$100 FOLDING WALKER
Walkers and canes offer the best health improvement, access to education, and improved economic security.

\$100 SEWING MACHINE
With Rotary machine sewing, sewing machines are used to create products that can be sold to help support the business.

\$250 CERAMIC WASHBASIN
A durable washbasin offers better hygiene, reduces the risk of disease, and can be used to wash clothes and other items.

\$500 COW
Provides providing dairy products, can produce calves that become a valuable asset to the family.

[Give the Gift Form](#) • Objections & Responses: [Handout](#) | [Web](#)
Fundraising: [53 Ways to Raise \\$1,000](#) | [Suggestions](#) | [Web](#) • [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!

FUNDRAISING: ROTARY DIRECT

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

Purpose

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

Rotary Direct Toolkit

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

Sign Up

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

Frequency

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

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

Modify

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

Acknowledgement

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

Reports

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

ROTARY DIRECT

Rotary's recurring giving program



ROTARY DIRECT SAVES...

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

DOING GOOD JUST GOT EASIER!

Enroll online: www.rotary.org/give

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

OR Fax: +1-847-328-5260

Please call to modify your existing Rotary Direct contributions
Phone: +1-866-976-8279

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

☒ **YES! I WILL ENROLL IN ROTARY DIRECT.**

Name _____

IF YOU ARE A ROTARIAN, PLEASE COMPLETE.

Rotary membership ID _____

Club name _____

Club number _____

Billing address _____

City _____ State/Province _____

Postal code _____ Country _____

Phone _____

Email _____

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

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

GIFT DESIGNATION (choose one)

<input type="checkbox"/> Annual Fund-SHARE	<input type="checkbox"/> PolioPlus Fund
<input type="checkbox"/> Providing Clean Water	<input type="checkbox"/> Fighting Disease
<input type="checkbox"/> Supporting Education	<input type="checkbox"/> Saving Mothers and Children
<input type="checkbox"/> Promoting Peace	<input type="checkbox"/> Growing Local Economies
<input type="checkbox"/> Other _____	

RECURRING GIFT AMOUNT (minimum US\$10)
☐ \$25 ☐ \$85 ☐ \$100 ☐ \$250 ☐ \$1,000 ☐ Other _____

Currency (if not US\$) _____

FREQUENCY

☐ Monthly ☐ Quarterly ☐ Annually (specify month) _____

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

CREDIT OR DEBIT CARD

☐ Visa ☐ MasterCard ☐ AmEx ☐ Discover

Card number _____

Expiration / CVN

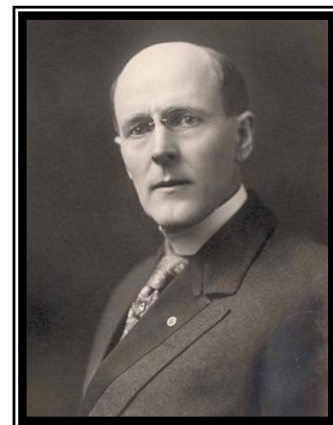
Signature _____



RECOGNITION: PAUL HARRIS SOCIETY

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

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



Join

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

Questions & Resources

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

Acknowledgement

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

Paul Harris Society Toolkit

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



Recognition

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

Reports

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

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

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

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

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

“**Rotary Direct**” is an individual who is participating in Rotary’s recurring giving program. 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).

RECOGNITION: INDIVIDUAL DONORS

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

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

Rotary Foundation Sustaining Member

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

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

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

[Website](#) ▪ [Brochure \(957\)](#)



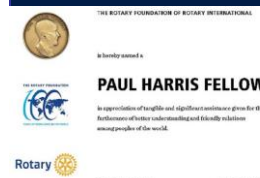
Paul Harris Fellow

When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. The recognition consists of a certificate and pin. Optional recognition items include a [medallion \(PHF\)](#) for \$15 and a [Certificate Cover \(PHCEN\)](#) for \$5.

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

[Presentation Remarks](#) ▪ [History of Paul Harris Fellows](#)

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



Certificate of Appreciation

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



Multiple Paul Harris Fellow

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

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

[Presentation Remarks](#)

Recognition items commemorate giving at these levels:

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

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



Paul Harris Society

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




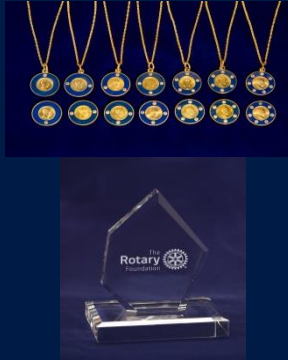
*See page 5 in this guide for more on the Paul Harris Society

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

[Website](#) ▪ [Brochure \(099\)](#) ▪ [Presentation Remarks](#) ▪ [FAQ](#) ▪ [Presentation](#)



RECOGNITION: INDIVIDUAL DONORS

<p>Major Donor</p> <p>When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant.</p> <p>*Major Donors are listed on the Major Donor, Arch Klumph and Bequest Society report.</p> <p>Rotary Giving Works Booklet (168) • Form Presentation Remarks</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> Level 1: \$10,000 to \$24,999 Level 2: \$25,000 to \$49,999 Level 3: \$50,000 to \$99,999 Level 4: \$100,000 to \$249,999 	
<p>Arch Klumph Society</p> <p>When your cumulative donations reach \$250,000. Recognition includes an induction ceremony at the Rotary International headquarters in Evanston, Illinois, USA, and your picture and biography in the Arch Klumph Society interactive gallery. You also receive invitations to society events, along with membership pins and crystals.</p> <p>*AKS members are listed on the Major Donor, Arch Klumph and Bequest Society report.</p> <p>Brochure (308) • Rotary Giving Works Booklet (168)</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> Trustees Circle: \$250,000 to \$499,999 Chair's Circle: \$500,000 to \$999,999 Foundation Circle: \$1,000,000 to \$2,499,999 Platinum Trustees Circle: \$2,500,000 to \$4,999,999 Platinum Chair's Circle: \$5,000,000 to \$9,999,999 Platinum Foundation Circle: \$10,000,000 and above 	
<p>Benefactor</p> <p>When you include the Endowment Fund as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.</p> <p>*Benefactors are listed on the Benefactor Report & identified on the Club Recognition Summary.</p> <p>Brochure (330) • Presentation Remarks</p>		
<p>Bequest Society</p> <p>When you give \$10,000 or more via your estate plans. Bequest Society members are recognized with an engraved crystal recognition piece and a Bequest Society pin.</p> <p>*Bequest Society members are listed on the Major Donor, Arch Klumph and Bequest Society report.</p> <p>Brochure (330) • Presentation Remarks Your Legacy, Rotary's Promise Booklet (824)</p>	<p>Recognition items commemorate giving at these levels:</p> <ul style="list-style-type: none"> Level 1: \$10,000 to \$24,999 Level 2: \$25,000 to \$49,999 Level 3: \$50,000 to \$99,999 Level 4: \$100,000 to \$249,999 Level 5: \$250,000 to \$499,999 Level 6: \$500,000 to \$999,999 Level 7: \$1,000,000 to \$2,499,999 Level 8: \$2,500,000 to \$4,999,999 Level 9: \$5,000,000 to \$9,999,999 Level 10: \$10,000,000 and above 	

RECOGNITION: CLUB BANNERS

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

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

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

*Use the [Club Foundation Banner Report](#) to determine if your club will qualify for the following annual recognition banners. Final banner certification is processed by the 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.

100% Foundation Giving Club

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.



100% Every Rotarian, Every Year Club

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.



Top Three Per Capita in Annual Fund Giving Club

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.



100% Paul Harris Society Club

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.

*See page 5 in this guide for more on the Paul Harris Society



100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

*Use the Club Recognition Summary to determine if your club will qualify for this recognition; once awarded, the date achieved appears on the top of this report.

To obtain this recognition:

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.

Note: This banner is only awarded once to a Rotary club but the intent is that the club will keep their membership at 100% Paul Harris Fellows in future years.

[Presentation Remarks](#) ▪ [100% Paul Harris Fellow Clubs List](#)



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](#) | 100% PHF Clubs: [List](#)
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 when doing the transfer over the phone.

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

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

Reports

Donor History Report

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

Club Recognition Summary

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

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

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

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

REPORTS: USING FOUNDATION REPORTS



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

Somewhere, IL, United States

A 100% Paul Harris Fellow Club 2013-2014

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

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

Using the Club Recognition Summary Guide



CLUB FOUNDATION BANNER REPORT FOR ROTARY YEAR: 2015-16

Evanston Lighthouse, IL, United States

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

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
B	C	D	E	F	G							


Using the Monthly Contribution Report Guide


REPORTS: FUNDRAISING REPORTS


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

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

REPORTS: MY ROTARY & ROTARY CLUB CENTRAL

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

Rotary Club Central 			
Helps clubs monitor their membership initiatives, service activities, and Foundation giving			
Resources		Questions	
Rotary Club Central: Video Foundation Reports for Officer Videos: Club • District How to Guides: • Accessing RCC • View Information • Record Service Activities • Set a Goal • Report Progress on a Goal		Rotary Support Center 866-976-8279 RotarySupportCenter@Rotary.org	
Task	Club Member	Club, District & Zone Leader	To Access Rotary Club Central
View Goals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	click “My Rotary” → see “My Club Snapshot” box on left, see Rotary Club Central below, click “View Goals” below
Edit Goals		<input checked="" type="checkbox"/>	

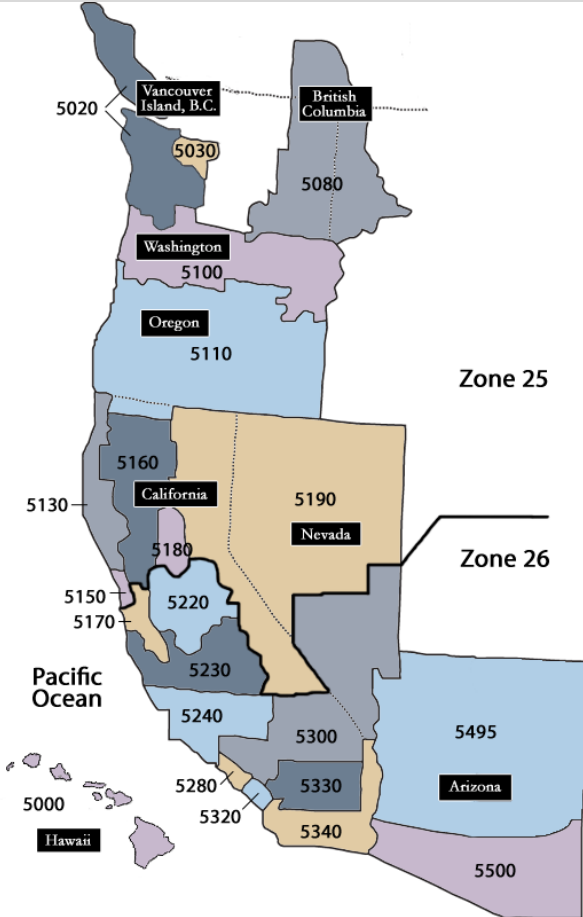
Rotary Foundation Reports 					
Foundation Reports Videos: Club Officers ▪ District Officers *To access reports click on “My Rotary” → click on “The Rotary Foundation” → click on “Foundation Reports” Adding Officers: Club Guide ▪ District Guide					
Reports Available		Club		District Leader	Zone Leader
		Member	Leader		
• Donor History Report		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Club Reports <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• District Fundraising Analysis		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
• Available DDF by District, Termed/Endowed Global Grant, Gift Availability Report, Endowed Fund Update, Foundation Banner Recognition Status Report, District Fundraising Analysis , Current Club Officer Giving Report & Incoming Club Officer Giving Report				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Note: Club treasurers, Foundation chairs & Membership chairs gain access after the current President or Secretary/Executive Secretary add them through their “My Rotary” → “Manage” → “Club Administration” → “Add/edit/remove club officers.”					
Additional District Report: TRF District Profiles (not available through My Rotary)					
*To request a Foundation report e-mail RotarySupportCenter@Rotary.org or call +1-866-976-8279					

RESOURCES: HYPERLINKS

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

Foundation Basics	Contribution & Forms 📁
Foundation: Reference Guide (219) • Presentation Annual: Report (187) • Fact (159) Operations: Report Publications: List • Newsletters: Subscribe	Donor History Report: Guide Matching Gifts: Web • FAQ Rotary Direct: Form (US) • Form (Canada) • FAQ • Presentation Contribution (123): Form • Web Give the Gift: Form • Web Multiple Donor (094): Form • How to generate
Annual Giving 📁	Paul Harris Society: Form IRA Transfer: Form Web Visions Ways to Give: Brochure (173) • Web Memorial & Tribute: Form Gift Acceptance Policy: Manual Objections & Responses: Handout • Web
Annual Fund: Web • Brochure (957) • Presentation Doing Good: Video • Advertisements Banners: Guide Foundation Minutes: Thoughts • Messages Sustaining Member: Stickers (956) • Proud Donor: Logo	Finance, Investments & Funding Model
Planned & Major Giving 📁	Finance: Web Investments: Report • Returns • Philosophy • Sheet Funding Model: Guide • Presentation & Notes • Video • Staff • Sheet
Major Gifts: Brochure (168) • Booklet • Presentation Endowment Fund: Designations • Named Funds • Report Planned Giving: Web • Guide • Language • Postcard • Advert Bequest: Web • Brochure (330) • Booklet • Donor Stories Arch Klumph Society: Brochure (308) Donor Advised Fund: Handout • Circular (382) • Log In Gift & Estate Planning Program: Guide • Webinar • Slides	Recognition & Forms 📁
Paul Harris Society 📁	Recognition: Web Banners: Guide Rotary Citation: Website Paul Harris Fellow: Form • FAQ • History • Medallion Major Donor: Form Recognition Replacement: Form
Join: Web • Form • Brochure (099) • Your PHSC How to: Presentation • Guide • Webinar FAQ: Handout Recognition: Remarks • Certificate Reports: Guide	Global Rewards 📁 & Rotary Credit Card 📁
End Polio Now 📁	Rewards: Web • Sheet • Video • Staff Rotary Credit Card: USA • Canada
End Polio Now: Brochure (944) • Poster (941) • Video • Web Sheet • Infographic • Take Action • Facebook • Guide • Pins The Plus in Polio Plus: Guide • Fact Sheet Lighting: Guide Media: Web Endgame: Prezi	Alumni 📁
Grants 📁	Alumni: Web • Newsletter • Questions • Presentation • Pin Engagement • FAQ • Reports • Facebook • LinkedIn • Map Associations: Map • FAQ Peace Fellows: Map
Grants: Handout • Manual • Presentation • Terms • Staff • Resources District: Video • Scholarship Global: Guide • Video • Success Scholarship • Process • Presentation • Reporting • Tips Online Fair for Grants: District Web • Global Web Vocational Training Teams: Guide • Fact Sheet • Video Scholarships: Presentation • Sheet • Flier • Orientation • Tips Sustainability: Guide • Video • Six Steps • Sheet Effective Projects: Guide Cadre: Web Tech Coordinator: List	Rotary Peace Centers 📁
Manuals	Application: Video • Web • FAQ • Tips • Recruiting • Press Release A Peace Fellow's Journey: Part 1 • Part 2 • Part 3 Peace Centers: Web • Presentation • Map & Using Map Webinar • Newsletter • Brochure (084) • Guide (085) • Logo • Pins (089) Support: Web • Making Peace a Reality (850) • Tie • Scarf Peacebuilder District: Flyer Social Media: Facebook • Blogs
Foundation: Club Committee: Manual (226E) • District Committee: Manual (300) • Seminar: Manual (438) • Grant Mgmt: Manual Lead Your District: Committee: Manual (249) • Train: Manual (246) • Club Pres: Manual (222) • AG: Manual (244) • DG: Manual (233) Code of Policies: Manual • Procedure: Manual (035) • Rotary E-Clubs: Manual • Trainers Resources: Web • Event Planning: Manual (216)	

RESOURCES: ZONE FOUNDATION TEAM ROTARIANS

Zone 25 Foundation Team <u>Bios</u>	Zone Resources http://zone2526.org <u>Website</u> <u>Videos</u> <u>Leaders</u> *serve all districts in their respective Zone Regional Rotary Foundation coordinators (RRFCs) promote Foundation activities and fundraising in their zones. RRFCs train their zone team of assistant regional Rotary Foundation coordinators and district leaders in setting and achieving fundraising and program goals.	Zone 26 Foundation Team <u>Bios</u>
Regional Rotary Foundation Coordinator (RRFC)* Steve Lewis 775-720-5092 steve@sterling-air.com		Regional Rotary Foundation Coordinator (RRFC)* 5230 Marge Cole 619-335-0590 margecole81@gmail.com
Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5020, 5030, 5080 Bill McCarthy 360-791-1467 bill@answersinc.net		Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5240, 5280, 5320, 5300, 5330, 5340 Miles Petroff C 909-993-4615; H 909-628-4877 miles.petroff@verizon.net
Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5100, 5110, 5190 LeAnn Mobley 541-944-0054 leann.mobley@gmail.com		Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5000, 5170, 5220, Joe Grebmeier 831-585-7545 jgrebmeier@msn.com
Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5130, 5150, 5160, 5180 Kevin Eisenberg 707-266-4967 kjeisenberg@gmail.com		Asst. Regional Rotary Foundation Coordinator (ARRFC) Districts: 5495, 5500 Randy Brooks 520-403-4763 randy@randy-brooks.com
End Polio Now Coordinator* Cort Vaughan 541-408-7651 jcortvaughan@gmail.com		End Polio Now Coordinator* Ernie Montagne 520-250-4067 ernie.montagne@hotmail.com
Endowment/Major Gift Adviser* Richard Clarke 250-941-4595 or 250-650-4595 137clarke@gmail.com		Endowment/Major Gift Adviser* Pam Russell 619.723.3651 pdgpam0809@gmail.com

RESOURCES: WORLD HEADQUARTERS STAFF

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

Publication Order Services				
Multimedia Publications Supplies				
Web: shop.rotary.org Telephone: 847-866-4600 Fax: 847-866-3276 Email: shop.rotary@rotary.org				
Publications: List Hours: Monday through Friday from 8:30 a.m. to 4:30 p.m. Central Time				
Club & District Support		Membership		
Rotary Club Central My Rotary Find Staff Representative		Website Guide		
James Damato Senior Supervisor 847-866-3405 james.damatojr@rotary.org	Sophie Dangerfield Associate Officer 847-424-5220 sophie.dangerfield@rotary.org	Nicole Jones Senior Regional Membership Officer 847-866-3407 nicole.jones@rotary.org		
End Polio Now	PolioPlus	SHARE	Rotary Peace Centers	
Handles fundraising questions	Handles program questions	District Designated Funds (DDF)	Handles program questions	
Clare Monroe PolioPlus Campaign Specialist 847-424-5244 clare.monroe@rotary.org	David Green PolioPlus Coordinator 847-866-3348 polioplus@rotary.org	Steve Lyons SHARE Supervisor 847-866-3362 steve.lyons@rotary.org	rotarypeacecenters@rotary.org	
Rotary Alumni	Areas of Focus Managers	Recognition		
		Assists with Major Donor recognition Form	Assists with Benefactor & Bequest Society recognition	
alumni@rotary.org	Staff Contact List	majordonorcoord@rotary.org	bbs@rotary.org	
Zone	District & Global Grants	Major Giving	Planned Giving	Annual Giving
	Handles Rotary grants Web Staff Resources	Provides options for major gifts Brochure (168) Presentation Major Gifts Major Impact	Handles Life Income Agreements, Donor Advised Fund and testamentary gifts Web	Promotes Every Rotarian Every Year, Rotary Direct, and Paul Harris Society Web Travel Schedule Bio
25	Renée Reiling Regional Grants Officer 847-866-3314 renee.reiling@rotary.org	Elizabeth Cruft-Anderson Senior Major Gifts Officer 847-866-3074 or 503-744-0865 elizabeth.cruft-anderson@rotary.org	Mitch Ashley Planned Giving Officer 510-207-5143 mitch.ashley@rotary.org	Steven Solomon Senior Annual Giving Officer 847-866-3195 steven.solomon@rotary.org
26	Cecelia Walter Regional Grants Officer 847-424-5266 cecelia.walter@rotary.org	Beth Garrow Major Gifts Officer 847-866-3034 or 630-207-6979 beth.garrow@rotary.org		