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.

### Table of Contents

<table>
<thead>
<tr>
<th>Chapter 1: Fundraising</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieving Success</td>
<td>2-3</td>
</tr>
<tr>
<td>Rotary Direct</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter 2: Recognition</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Harris Society</td>
<td>5</td>
</tr>
<tr>
<td>Individual Donors</td>
<td>6-7</td>
</tr>
<tr>
<td>Club Banners</td>
<td>8</td>
</tr>
<tr>
<td>Foundation Recognition Points</td>
<td>9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter 3: Reports</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using Foundation Report Guides</td>
<td>10</td>
</tr>
<tr>
<td>Fundraising Reports</td>
<td>11</td>
</tr>
<tr>
<td>My Rotary &amp; Rotary Club Central</td>
<td>12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter 4: Resources</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hyperlinks</td>
<td>13</td>
</tr>
<tr>
<td>Zone Foundation Team Rotarians</td>
<td>14</td>
</tr>
<tr>
<td>World Headquarters Staff</td>
<td>15</td>
</tr>
</tbody>
</table>

### Finding the latest version of this guide:

1. Visit [www.zone2526.org](http://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)

**The Rotary Foundation** was named as the “World’s Outstanding 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.

<table>
<thead>
<tr>
<th>Showcase</th>
<th>Ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share successful project stories, photos, and video; report the project’s contribution to Rotary’s Global Impact.</td>
<td>Find donors, partners and volunteers for your projects.</td>
</tr>
<tr>
<td>Website • Guides • Video • Questions</td>
<td>Website • Guides • Video • Questions</td>
</tr>
<tr>
<td></td>
<td>Four Part Series: Video 1 • Video 2 • Video 3 • Video 4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Brand Center</th>
<th>Discussion Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create promotional materials with our latest branding tools.</td>
<td>Share your experiences and ideas with other members.</td>
</tr>
<tr>
<td>Web • Guides • Presentation • Questions Strengthen Club Video • New Look Video</td>
<td>Web • Guides • Video • Questions</td>
</tr>
</tbody>
</table>

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 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.

FUNDRAISING: ROTARY DIRECT

<table>
<thead>
<tr>
<th>Rotary Direct Toolkit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form (US) • Form (Canada) • Presentation • FAQ</td>
</tr>
</tbody>
</table>

Sign Up
a) **Web:** Select a recurring frequency in Step 2 of the online contribution process under the section titled “Frequency (Enroll in Rotary Direct)”

b) **Phone:** 866-976-8279

c) **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.
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 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
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.

<table>
<thead>
<tr>
<th>Club</th>
<th>ID</th>
<th>Name</th>
<th>PHS Member</th>
<th>PHS Join Date</th>
<th>Rotary Direct</th>
<th>PHS Eligible 14-15</th>
<th>PHS Eligible 13-14</th>
<th>PHS Eligible 12-13</th>
<th>PHS Eligible 11-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicago</td>
<td>13245</td>
<td>Paul Harris</td>
<td>Y</td>
<td>1 July 2013</td>
<td>Y</td>
<td>1 July 2015</td>
<td>1 July 2013</td>
<td>1 July 2012</td>
<td>1 July 2011</td>
</tr>
</tbody>
</table>

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).
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)](https://www.rotary.org/en) to recognize these donors in your club.

*Use the [Club Foundation Banner Report](https://www.rotary.org/en) to see your Rotary Foundation Sustaining members.

* [Website](https://www.rotary.org/en) • [Brochure (957)](https://www.rotary.org/en)

### 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)](https://www.rotary.org/en) for $15 and a [Certificate Cover (PHCEN)](https://www.rotary.org/en) for $5.

*Use the [Club Recognition Summary](https://www.rotary.org/en) 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](https://www.rotary.org/en) to see your multiple Paul Harris Fellows.

*Presentation Remarks*

### 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](https://www.rotary.org/en).

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

*Use the [Paul Harris Society Report](https://www.rotary.org/en) to see your PHS members and their PHS eligibility.

*Website* • *Brochure (099)* • *Presentation Remarks* • *FAQ* • *Presentation*

<table>
<thead>
<tr>
<th>Level</th>
<th>Range</th>
<th>Recognition Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>+1</td>
<td>2,000 to 2,999.99</td>
<td>1 sapphire</td>
</tr>
<tr>
<td>+2</td>
<td>3,000 to 3,999.99</td>
<td>2 sapphires</td>
</tr>
<tr>
<td>+3</td>
<td>4,000 to 4,999.99</td>
<td>3 sapphires</td>
</tr>
<tr>
<td>+4</td>
<td>5,000 to 5,999.99</td>
<td>4 sapphires</td>
</tr>
<tr>
<td>+5</td>
<td>6,000 to 6,999.99</td>
<td>5 sapphires</td>
</tr>
<tr>
<td>+6</td>
<td>7,000 to 7,999.99</td>
<td>1 ruby</td>
</tr>
<tr>
<td>+7</td>
<td>8,000 to 8,999.99</td>
<td>2 rubies</td>
</tr>
<tr>
<td>+8</td>
<td>9,000 to 9,999.99</td>
<td>3 rubies</td>
</tr>
</tbody>
</table>

* range can be a combination of cash contributions and Foundation recognition points received.
# RECOGNITION: INDIVIDUAL DONORS

## Major Donor
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.

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

- **Recognition items commemorate giving at these levels:**
  - Level 1: $10,000 to $24,999
  - Level 2: $25,000 to $49,999
  - Level 3: $50,000 to $99,999
  - Level 4: $100,000 to $249,999

## Arch Klumph Society
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.

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

- **Recognition items commemorate giving at these levels:**
  - 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

## Benefactor
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.

*Benefactors are listed on the Benefactor Report & identified on the Club Recognition Summary.

## Bequest Society
When you give $10,000 or more via your estate plans. Bequest Society members are recognized with an engraved crystal recognition piece and a Bequest Society pin.

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

- **Recognition items commemorate giving at these levels:**
  - Level 1: $10,000 to $24,999
  - Level 2: $25,000 to $49,999
  - Level 3: $50,000 to $99,999
  - Level 4: $100,000 to $249,999
  - Level 5: $250,000 to $499,999
  - Level 6: $500,000 to $999,999
  - Level 7: $1,000,000 to $2,499,999
  - Level 8: $2,500,000 to $4,999,999
  - Level 9: $5,000,000 to $9,999,999
  - Level 10: $10,000,000 and above
RECOGNITION: CLUB BANNERS

The Rotary Foundation shows its appreciation to Rotary clubs for 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
Recognized: 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.

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

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

Using the Club Recognition Summary Guide

Using the Club Foundation Banner Report Guide

Using the Monthly Contribution Report Guide
### REPORTS: FUNDRAISING REPORTS

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

<table>
<thead>
<tr>
<th>Report</th>
<th>Information Available</th>
<th>Access</th>
<th>Format</th>
<th>Location</th>
</tr>
</thead>
</table>
| Donor History                               | • 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                      | • Provides eligibility dates achieved for club banner recognition for current Rotary year, lists PHS membership & Rotary Direct donors | club     | PDF    | My Rotary Support Center |
| Club Fundraising Analysis                   | • Provides a 5 Rotary year of Annual Fund goals, giving and recognition  
  • *Use for goal setting                                                                   | club     | PDF    | My Rotary Support Center |
| Club Recognition Summary                    | • Provides club member’s Paul Harris Fellow level, recognition amount, Foundation recognition points available, Rotary Direct donors, benefactors, last contribution date & designation.  
  • Indicates 100% Paul Harris Fellow Club achievement and date along with the club’s all-time Foundation giving | club     | PDF    | My Rotary Support Center |
| Monthly Contribution Report                 | • Provides contribution information by club for Annual Fund, Other Funds (global grants & PolioPlus) & Endowment Fund  
  • *Use to identify non-contributing clubs                                                     | district | PDF    | My Rotary Support Center |
| Paul Harris Society Report                  | • 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     | Excel  | My Rotary Support Center |
| Foundation Banner Recognition Status        | • Provides progress toward club banner recognitions (100% Every Rotarian, Every Year Club, 100% Foundation Giving Club, Annual Fund Top 3 Per Capita) for a Rotary year  
  • *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    | My Rotary Support Center |
| District Fundraising Analysis               | • Provides a 5 Rotary year dashboard for district giving to the Annual Fund, PolioPlus, Endowment Fund and Total Giving  
  • Lists all-time recognition for Paul Harris Fellow, Benefactor, Bequest Society and Major Donor data  
  • Provides five Rotary years of Paul Harris Fellow, Benefactor, Bequest Society, Major Donors, Major Gifts, EREY, Sustaining Member and Paul Harris Society eligible data  
  • Lists number of total endowed funds and their market value                                    | district | PDF    | My Rotary Support Center |
| Recognition Report                          | • Provides lists of Bequest Society, Major Donor and Arch Klumph Society members with their recognition date achieved  
  • Report includes two additional tabs with mailing address  
  • *Use excel version for mail merge for invitations                                               | club     | PDF    | My Rotary Support Center |
| Program Participants & Alumni               | • Provides a list of current and past program participants associated to a particular district; three tabs provide information individuals residing, hosted and sponsored by a district. | district | PDF    | My Rotary Support Center |
### 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.

<table>
<thead>
<tr>
<th>Resources</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guides • Tips • Webinar • FAQ</td>
<td>Club &amp; District Support</td>
</tr>
<tr>
<td>Learning Center: Video</td>
<td>Find your representative</td>
</tr>
</tbody>
</table>

### Rotary Club Central

Helps clubs monitor their membership initiatives, service activities, and Foundation giving

<table>
<thead>
<tr>
<th>Resources</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotary Club Central: Video</td>
<td>Rotary Support Center</td>
</tr>
<tr>
<td>Foundation Reports for Officer Videos: Club • District</td>
<td>866-976-8279</td>
</tr>
<tr>
<td>How to Guides: • Accessing RCC • View Information • Record Service Activities</td>
<td><a href="mailto:RotarySupportCenter@Rotary.org">RotarySupportCenter@Rotary.org</a></td>
</tr>
<tr>
<td>• Set a Goal • Report Progress on a Goal</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task</th>
<th>Club Member</th>
<th>Club, District &amp; Zone Leader</th>
<th>To Access Rotary Club Central</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Goals</td>
<td>✔</td>
<td>✔</td>
<td>click “My Rotary” → see “My Club Snapshot” box on left, see Rotary Club Central below, click “View Goals” below</td>
</tr>
<tr>
<td>Edit Goals</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th>Reports Available</th>
<th>Club Member</th>
<th>District Leader</th>
<th>Zone Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Donor History Report</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td><strong>Club Reports</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Benefactor Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Club Recognition Summary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Club Foundation Banner Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Major Donor, Arch Klumph &amp; Bequest Society Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Club Fundraising Analysis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Paul Harris Society Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>District Reports</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Monthly Contribution Report</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>• PolioPlus Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• District Fundraising Analysis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>•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 &amp; Incoming Club Officer Giving Report</td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

**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](#).

<table>
<thead>
<tr>
<th>Foundation Basics</th>
<th>Contribution &amp; Forms ▫</th>
<th>Finance, Investments &amp; Funding Model</th>
<th>Recognition &amp; Forms ▫</th>
<th>Global Rewards ▫ &amp; Rotary Credit Card ▫</th>
<th>End Polio Now ▫</th>
<th>Grants ▫</th>
<th>Rotary Peace Centers ▫</th>
<th>Manuals ▫</th>
</tr>
</thead>
</table>
### RESOURCES: ZONE FOUNDATION TEAM ROTARIANS

#### Zone 25

**Foundation Team Bios**

- **Regional Rotary Foundation Coordinator (RRFC)**
  - Steve Lewis
  - 775-720-5092
  - steve@sterling-air.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: 5100, 5110, 5190**
  - LeAnn Mobley
  - 541-944-0054
  - leann.mobley@gmail.com

- **Asst. Regional Rotary Foundation Coordinator (ARRFC)**
  - **Districts: 5130, 5150, 5160, 5180**
  - Kevin Eisenberg
  - 707-266-4967
  - kjeisenberg@gmail.com

- **End Polio Now Coordinator**
  - Cort Vaughan
  - 541-408-7651
  - jcortvaughan@gmail.com

- **Endowment/Major Gift Adviser**
  - Richard Clarke
  - 250-941-4595 or 250-650-4595
  - 137clarke@gmail.com

#### Zone 26

**Foundation Team Bios**

- **Regional Rotary Foundation Coordinator (RRFC)**
  - 5230
  - Marge Cole
  - 619-335-0590
  - margecole81@gmail.com

- **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: 5000, 5170, 5220, 5300, 5330, 5340**
  - Joe Grebmeier
  - 831-585-7545
  - jgrebmeier@msn.com

- **Asst. Regional Rotary Foundation Coordinator (ARRFC)**
  - **Districts: 5495, 5500**
  - Randy Brooks
  - 520-403-4763
  - randy@randy-brooks.com

- **End Polio Now Coordinator**
  - Ernie Montagne
  - 520-250-4067
  - ernie.montagne@hotmail.com

- **Endowment/Major Gift Adviser**
  - Pam Russell
  - 619.723.3651
  - pdgpamo809@gmail.com

---

**Zone Resources**

- Website | Videos | Leaders

*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.
## 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

### 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

## 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

Rotary Club Central | My Rotary | Find Staff Representative

- **James Damato**
  - Senior Supervisor
  - 847-866-3405
  - james.damatojr@rotary.org

- **Sophie Dangerfield**
  - Associate Officer
  - 847-424-5220
  - sophie.dangerfield@rotary.org

- **Clare Monroe**
  - PolioPlus Campaign Specialist
  - 847-424-5244
  - clare.monroe@rotary.org

- **David Green**
  - PolioPlus Coordinator
  - 847-866-3348
  - polioplus@rotary.org

### End Polio Now

Handles **fundraising** questions

- **Clare Monroe**
  - PolioPlus Campaign Specialist
  - 847-424-5244
  - clare.monroe@rotary.org

### PolioPlus

Handles **program** questions

- **David Green**
  - PolioPlus Coordinator
  - 847-866-3348
  - polioplus@rotary.org

### SHARE

District Designated Funds (DDF)

- **Steve Lyons**
  - SHARE Supervisor
  - 847-866-3362
  - steve.lyons@rotary.org

### Rotary Peace Centers

Handles program questions

- **rotarypeacecenters@rotary.org**

### Rotary Alumni

Assists with program questions

- **alumni@rotary.org**

### Areas of Focus Managers

Consults about project design, new initiatives and grants

- **alumni@rotary.org**

### Recognition

- **Assists with Major Donor recognition**
  - **Form**
  - **majordonorcoord@rotary.org**

- **Assists with Benefactor & Bequest Society recognition**
  - **bbs@rotary.org**

### District & Global Grants

Handles Rotary grants

- **Web** | **Staff** | **Resources**
  - **Zone 25**
    - **Renee 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
  - **Zone 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

### Major Giving

Provides options for major gifts

- **Brochure (168)** | **Presentation** | Major Gifts Major Impact

### Planned Giving

Handles Life Income Agreements, Donor Advised Fund and testamentary gifts

- **Web**
  - **Mitch Ashley**
    - Planned Giving Officer
    - 510-207-5443
    - mitch.ashley@rotary.org

### Annual Giving

Promotes Every Rotarian Every Year, Rotary Direct, and Paul Harris Society

- **Web** | **Travel Schedule** | **Bio**
  - **Zone 25**
    - **Mitch Ashley**
      - Planned Giving Officer
      - 510-207-5443
      - mitch.ashley@rotary.org
    - **Steven Solomon**
      - Senior Annual Giving Officer
      - 847-866-3195
      - steven.solomon@rotary.org
  - **Zone 26**
    - **James Damato**
      - Senior Supervisor
      - 847-866-3405
      - james.damatojr@rotary.org

---