



THE ROTARY FOUNDATION

Zone 27 Communication

Districts 5650, 5950, 5960, 5970, 6000, 6220, 6250, 6270, 6420, 6440, 6450 & Welcoming District 5580

Foundation News for Rotary Districts and Rotary Clubs
May 2009

OUR ROTARY FOUNDATION UPDATE 2008-2009

District	07-08 Total	08-09 Goal	08-09 Total	% of Goal	/Capita	Polio Challenge	Perm Fund
D5580	\$ 329,193	\$ 332,554	\$ 172,764	51.95%	\$ 53.17	\$ 50,305 32/66	\$ 500
D5650	\$ 217,866	\$ 197,976	\$ 152,038	76.80%	\$ 63.88	\$ 35,958 33/45	\$ 1,125
D5950	\$ 913,784	\$ 724,825	\$ 374,263	51.63%	\$ 123.64	\$ 21,455 29/61	\$ 8,292
D5960	\$ 343,422	\$ 318,324	\$ 194,080	60.97%	\$ 58.62	\$ 125,088 63/64	\$ 302,036
D5970	\$ 242,407	\$ 226,639	\$ 103,473	45.66%	\$ 34.87	\$ 60,816 37/56	0
D6000	\$ 452,457	\$ 427,077	\$ 273,420	64.02%	\$ 64.58	\$ 80,857 44/62	\$ 150,876
D6220	\$ 176,197	\$ 112,915	\$ 75,019	66.83%	\$ 38.28	\$ 42,789 24/41	\$ 350
D6250	\$ 234,361	\$ 273,350	\$ 136,494	49.93%	\$ 39.86	\$ 84,826 43/61	\$ 981,514
D6270	\$ 230,941	\$ 293,160	\$ 155,796	53.14%	\$ 46.91	\$ 230,118 52/60	\$ 2,000
D6420	\$ 170,262	\$ 157,175	\$ 94,493	60.12%	\$ 42.55	\$ 45,441 33/49	\$ 100
D6440	\$ 424,200	\$ 352,730	\$ 175,475	49.75%	\$ 66.14	\$ 200,153 53/72	\$ 69,243
D6450	\$ 326,066	\$ 242,005	\$ 124,511	51.58%	\$ 53.95	\$ 57,112 33/65	\$ 11,149
TOTALS	\$3,731,963	\$3,326,176	\$ 1,859,062	57.31%	\$ 57.57	\$ 984,613 thru 3-31-09 444 / 636 participation Goal: \$1,908,000 (Based on \$3,000/Club -December 2007-2010)	\$ 1,526,685

The Permanent Fund contributions only include realized gifts only.

- Notes:**
- For the remainder of the 2008-2009, this contribution report will include District 5580 as a line item, but they will not be included in the totals shown. I thought it might be of value to all of you to see the District 5580 reports as we prepare for our new Zone alignment.
 - The "Restricted Giving" column has been changed to the Rotary's \$200 Million Challenge donations. The 0/0 ratio includes the number of Clubs that have contributed as compared to the number of Clubs in each District, since December 1, 2007 through March 31, 2009. Please note that the total shown includes any District contributions as well as all individual Club contributions.

All information included in this report reflects contributions through March 31, 2009

Clubs Making Dreams Real Through Their Annual Giving Contributions

District	Highest Giving Club/Capita	Membership	Goal	Thru 2-28-09	Per Capita	# < \$10.00/Capita/#Club/# Members
D5580	Central Lakes-Pequot Lakes, MN	23	\$15,000	\$7,958	\$ 376.43/capita	20/66 Clubs / 3249 Members
D5650	Lincoln South, NE	43	8,500	6,733	156.58/capita	10/45 Clubs / 2380 Members
D5950	Edina, MN	146	47,400	48,529	332.39/capita	10/61 Clubs / 3027 Members
D5960	Roseville, MN	80	25,000	27,855	348.19/capita	21/64 Clubs / 3311 Members
D5970	Dubuque Key City, IA	11	0	2,780	252.73/capita	19/56 Clubs / 2967 Members
D6000	West Liberty, IA	33	7,632	9,100	275.76/capita	8/62 Clubs / 4234 Members
D6220	Waupaca Breakfast, WI	54	6,000	9,118	170.15/capita	18/41 Clubs / 1971 Members
D6250	Fitchburg-Verona, WI	12	650	1,500	125.00/capita	25/61 Clubs / 3424 Members
D6270	Whitnall Park, WI	24	2,640	4,295	178.96/capita	20/60 Clubs / 3321 Members
D6420	Quad Cities, IL	22	2,200	5,982	271.91/capita	18/49 Clubs / 2221 Members
D6440	Wheeling, IL	22	4,800	7,650	347.73/capita	18/71 Clubs / 2653 Members
D6450	Chicago Financial District, IL	31	3,100	10,650	343.55/capita	28/65 Clubs / 2308 Members

For those with much, much is expected.

March 31, 2009 Contribution Totals

Annual Programs Fund	Worldwide	\$ 63,957,729	- 10.44% from 2007-2008
	Zone 27	\$ 1,859,062	- 13.00 % from 2007-2008 (YTD)
PolioPlus	Worldwide	\$ 17,413,636	+ 364.40% (Not including Gates Gift)
	Zone 27	\$ 984,613	Since December 2007.
Permanent Fund	Worldwide	\$ 7,312,915	- 35.35% (realized gifts only)
	Zone 27	\$ 1,526,685	Zone 27 leads the WORLD (realized gifts only)

April 30, 2009 INTERIM Contribution Totals

Annual Programs Fund	Worldwide	\$ 69,933,045	- 16.00% from 2007-2008
PolioPlus	Worldwide	\$ 18,857,813	+ 270.00% (Not including Gates Gift)
Permanent Fund	Worldwide	\$ 8,008,448	- 35.00% (realized gifts only)

What can we do to Turn the Tide?

I share the April "Interim" report as is most closely represents the work we have left to do. With two months remaining in our **Make Dreams Real** Rotary year, I would like to offer some pro-active suggestions on a plan of action. (I would like to think that personal phone calls can be divided between the DG, the DRFC and the Annual Giving Sub-committee Chair.)

1. Print your District's March Monthly Contribution Report as well as the "interim" report via Member Access.
2. Compare each of your Club's YTD giving to their Club Goal set at PETS 2008.
3. Make a personal phone call to each Club and address the following:
 - a. If the **Club has exceeded their goal**, congratulate the President and ask him/her if they can estimate what their final contribution total might be.
 - b. If the **Club is on target to meet their goal**, congratulate the President and ask her/him if they can estimate what their final contribution total might be.
 - c. If the **Club is below 75% toward their Club Goal**, ask the President if he/she can tell you why.
 - i. Do they have a Club Rotary Foundation Committee Chair?
 - ii. Do they have a plan to "ask" every member to contribute to the Every Rotarian Every Year effort between the time of your call and June 15?
 - iii. Have gifts been accumulating in the Club's treasury? If so, they need to be sent to TRF immediately. Assist these Clubs with the mechanics of sending itemized gifts to The Foundation. (Simple sample form below)

Member ID #	Member Name	Gift Amount
123456	John Rotarian	\$50.00
789101	Jane Rotarian	\$25.00
234567	Mike Every	\$25.00
891011	Rita Giver	\$42.50
Club #3456	TOTAL GIFTS (Check #6789)	\$142.50
District #0000		

- d. If the **Club is at Zero giving**, ask the President if there is a problem. Does the Club need a speaker to share with their members to put a face on The Foundation? Have they given in past years? Have any of their members been asked to support OUR Rotary Foundation? Have they participated in the programs of TRF? Quite simply, we need to know why they are not supporting The Foundation.



Rotary's \$200 Million Challenge – DDF Contributions and History

Following are two lists. The first will show the total contributions of our Zone 27 Districts from 2002-2005. These totals provide us with good historical data that we can use in promoting our efforts between now and 2012. The second listing is from The Rotary Foundation with a special request for your consideration in donating 20% of your 2008-2009 District Designated Funds (DDF) to the End Polio Now effort. The third column lists the DDF Contributions made through April 29, 2009.

	<u>2002-2005 Polio Contributions</u>	<u>2008-2009 DDF Requests</u>	<u>DDF Contributions</u>
District 5650	\$ 202,408	\$ 20,013.11	\$ 20,000
District 5950	\$ 934,803	\$ 59,159.24	\$ 0
District 5960	\$ 564,037	\$ 34,157.97	\$ 50,000
District 5970	\$ 233,089	\$ 20,885.82	\$ 0
District 6000	\$ 687,218	\$ 43,438.45	\$ 0
District 6220	\$ 234,603	\$ 15,341.00	\$ 0
District 6250	\$ 719,807	\$ 25,323.77	\$ 24,000
District 6270	\$ 393,424	\$ 24,734.85	\$ 25,000
District 6420	\$ 728,381	\$ 19,366.66	\$ 0
District 6440	\$ 999,703	\$ 43,448.92	\$ 0
District 6450	\$ 683,166	\$ 27,687.40	\$ 0
	\$ 6,380,639	\$ 333,557.19	\$ 119,000

Thank you to those Districts who have donated their DDF. We are well on our way to providing our necessary and valuable support in fulfilling our promise to the children of the world. Worldwide we have raised over \$75 million in cash, DDF and pledges toward our goal of \$200M. The Trustees would truly like to make an announcement at the Birmingham Convention that we have reached the \$100M mark of our goal. Let's all play a part in that great milestone as we continue to raise the awareness in our Clubs and in our Communities.

World Peace Program Update

At their April 2009 meeting, the Trustees of The Rotary Foundation decided to phase out the Rotary Center for International Studies at the University of California-Berkeley. The decision is effective with the graduation of the incoming Class VII of Rotary World Peace Fellows for 2009-2011. The Trustees and the Rotary Centers for International Studies Committee are in the process of selecting new Rotary Centers partner universities. The initial list of potential partners will be reviewed at the Trustees April 2010 meeting.

The Permanent Fund of OUR Rotary Foundation (from the VISIONS Newsletter)

Review your estate plans if...

- ◆ You move to another state.
- ◆ The person you selected to settle the estate can no longer serve.
- ◆ You experience change in financial circumstances, such as acquiring new assets or market fluctuations.
- ◆ There are births, deaths, or change in marital status among your loved ones.
- ◆ The needs of heirs and loved one change.
- ◆ You acquire real estate in another state.
- ◆ You have sold or given away property.
- ◆ There are tax law changes.
- ◆ Your philanthropic priorities change.

Will you include The Rotary Foundation in your estate plans to forever be a part of Rotary's legacy of doing good in the world? Receive a special invitation to join the Bequest Society by contacting Karena Bierman, Senior Planned Giving Officer, at 847-866-3100 or plannedgiving@rotary.org.

Continuing to Plan for “The Future of Rotary is in Your Hands” Rotary Year

Like all of our Districts, Zone 28 (currently Zone 27) is moving forward with our transition to the 2009-2010 Rotary Year. Don Goering will be leading us as Regional Rotary Foundation Coordinator (RRFC) beginning July 1. We have been accumulating updated District Rotary Foundation Committee information and would really appreciate it you would forward any changes to Mary Beth Growney Selene at mbgrowneyselene@ryansigns.net. If you have already done so, there is no need to duplicate your efforts. But...if you have not forwarded your new committee members to me, please do so at your earliest convenience. The goal of your Zone 28 team is to keep all of your District Rotary Foundation committee chairs up to date with relevant and pertinent information. Thank you.

Recognition Points Update

In an effort to reduce the administrative costs of managing the transfer of our member’s “recognition points” The Trustees had determined that 500 such points would be the minimum allowed per transfer. The exception to this minimum would be if the transfer of recognition points occurred at the same time as and with a cash contribution. When accompanied by a cash contribution, there would be no minimum. At their April 2009 meeting, the Trustees modified their decision. **Effective July 1, 2009, the minimum transfer will be 100 recognition points, with no minimum when the transfer accompanies a cash contribution.**

Any remaining **recognition points associated with a deceased Rotarian will be lost as of July 1, 2009.** If Clubs are interested in transferring those recognition points prior to July 1, direct them to Member Access Club Recognition Summary (CRS). Select “all members”. The list will include any/all members of their Club who ever gave to RRF. Deceased members are shown with an “*” next to their name. Any recognition points will be listed on the right side of the report.

“Transferring of Points” points of interest:

- a. Points can only be transferred once.
- b. Points can only be transferred to an individual, not to the Club or the District.

Future Vision Pilot District Applications Update

I am so pleased to announce the following Districts (to date) have made or are in the process of making application to serve as a Pilot District for the Future Vision Plan:

District 5580 District 5950
District 5960 District 5970
District 6000 District 6250
District 6420 District 6440
District 6450

These results show that you, as District leaders, have shared the tremendous opportunities of serving as a Pilot District with your Clubs. Thank you so much for all you have done to make this happen.

**“Shouldn’t life be about...
Doing Something,
Leaving Something,
Creating Something
That Makes Life Better for Someone Else?”**

-Leonard Pitts, The Miami Herald

**Please make sure that each and every one of your Rotarians is ASKED
to help make life better for someone else,
through a gift to OUR Rotary Foundation’s Annual Programs Fund.**