



## ZONE 33 ROTARY FOUNDATION TEAM NEWSLETTER

*PDG Kay A. Oldhouser, Editor*

August 2006

### **LEAD THE WAY IN ZONE 33 WITH OUR FOUNDATION**

**W**elcome to the first edition of the 2006-07 Zone 33 Foundation Newsletter. First of all, this is YOUR newsletter and PDG Kay Oldhouser, the editor, would love for Rotarians to submit information from districts relative to any of our Foundation programs. Feel free to email items to her any time and she will include them in future editions. We have one article in this edition from PDG Phil Morris, D7690, on GSE. Please read it as it is very interesting and informative.

This Rotary year is off to a good start with Foundation seminars, banquets, and planning meetings being scheduled. This is the way for district governors, Foundation chairs and their committees to ensure a successful year. I applaud and encourage each of you to *Lead the Way* and have the very best year your district has had. It is possible if you plan, educate, inspire, and set an example for others to follow. You will be making history and writing another great chapter for your club's archives.

You have a professional, hard-working, dedicated group of Rotarians at the zone level who are willing to help you in any way they can. They are the Zone 33 Gift Advisors, Alumni Coordinator, Grants Advisor, and Zone District Trainer Advisor. The listing is below, and I encourage you to call on them any time for assistance throughout the year.

**Gift Advisors:**

- |                           |                      |
|---------------------------|----------------------|
| • D7530, 7550, 7610       | PDG Sandy Duckworth  |
| • D7600, 7570, 7690, 7710 | PDG Joe Mulkerrin    |
| • D7680, 7720, 7730       | PDG Tom Payne        |
| • D7670, 7750, 7770       | PDG Johnny Robertson |

**Alumni Coordinator:** PDG Mike Thacker

**Grants Advisor:** PDG Ron Ferrill

**District Trainer Advisor:** PDG Randy Lickey



Front Row: PDG Anne L. Matthews, RRFC; PDG Sandy Duckworth, Gift Advisor; PDG Joe Mulkerrin, Gift Advisor  
 Back Row: PDG Mike Thacker, RFAC; PDG Johnny Robertson, Gift Advisor; PDG Ron Ferrill, Grants Advisor; PDG Tom Payne, Gift Advisor  
 Missing: PDG Randy Lickey, District Trainer Advisor

**You will find below the Foundation goals for this year, as established by the Foundation Trustees. The Chair of the Trustees is Past Rotary International President Luis Gaiy from Argentina. Please review these goals and be sure they are included in your planning for the year. The overall financial goal for the annual giving program is 120 million dollars. This is a lofty goal but it is reachable with a lot of dedicated work from all of us. I feel sure Zone 33 will do its part to help meet this goal.**

**During the Foundation portion of the Institute in Orlando in October, Trustee Chair Gaiy will be the luncheon speaker. You will want to attend this occasion. One of the highlights of this luncheon is the recognition of districts in Zones 33 and 34 who accomplished outstanding results with the Foundation this past year.**

**Speaking about Foundation results, Editor Kay has listed in the newsletter results for the 05-06 Rotary year. Zone 33 decreased its contributions to the Annual Programs Fund a small amount, 1.8 percent, from the previous year. All that means is that it gives us impetus to do much better this year, and we will. Congratulations to everyone but especially to the districts listed below which exceeded the \$100 per capita. They are listed in order of highest amount given.**

- District 7690            \$145.57
- District 7710            \$137.48
- District 7600            \$137.45
- District 7770            \$137.02
- District 7610            \$130.41

**Our goal for this year is for all the districts to meet the \$100 per capita and for those districts which have done so well, to continue to raise the bar in the Zone and make us all very proud.**

**Please contact me if I can be of assistance any time.**

***RRFC Anne L. Matthews***

## **Foundation Goals Can Provide the Power to *Lead the Way***

*The Rotary Foundation is a large and successful international organization. Its many accomplishments are achieved through the efforts of individual Rotarians, their clubs, and districts. Our mission statement to achieve world understanding and peace is a lofty goal that can only be achieved through the sustained action and commitment of Rotarians. Each year, the president of RI chooses a theme as an embodiment of the intentions of Rotarians, and the chair of The Rotary Foundation expresses the Foundation's goals.*

*As chairman of the Foundation's Board of Trustees for 2006-07, I am pleased to present the goals approved by the Trustees with an aim of achieving increasingly better results in the organization's operations.*

*All areas of our Foundation's endeavor – administration, investments, programs, and so forth – are equally important, and we will expend every effort and put every advantage to use for the optimum development of each. However, in order to expedite the work that lies ahead, we have chosen seven goals that will guide us and enable us to **Lead the Way** in 2006-07.*

*During 2006-07, The Rotary Foundation will:*

- 1. Focus on the eradication of polio*
- 2. Heighten its profile on the world stage in the field of peace and conflict resolution through its unique partnerships with premier institutions*
- 3. Achieve a worldwide per capita of US\$100 in giving to the Annual Programs Fund while establishing a new record for major gifts to the Permanent Fund*
- 4. Collaborate with Rotary International to enhance Rotary's public image*
- 5. Improve grassroots-level training to increase awareness of the Foundation's mission*
- 6. Articulate and implement the future vision of The Rotary Foundation for Rotary's second century of service*
- 7. Strive to administer its programs with speed and simplicity*

*Thank you in advance for your lasting and generous support of The Rotary Foundation, today and into the future. Let us keep in mind that our Foundation is the best present that we can offer to ensure a shining future for Rotary.*

***Luis Vicente Giay***

***The Rotary Foundation Trustee Chair, 2006-07***

## **TRF Receives Highest Rating!**

I am happy to alert you that OUR Rotary Foundation has received a **4-STAR** (out of 4) rating from Charity Navigator, America's largest independent evaluator of charities. Please share this

information with your clubs, feel free to reference this in any newsletters, and be proud of the exceptional achievement!

“Less than a quarter of the charities we evaluate have received our highest rating, indicating that The Rotary Foundation of Rotary International outperforms the majority of nonprofits in America with respect to fiscal responsibility,” says Trent Stamp, executive director of Charity Navigator, in the letter announcing RI’s four-star rating. A full story is available on our website at: [http://www.rotary.org/newsroom/programs/060729\\_navigator.html](http://www.rotary.org/newsroom/programs/060729_navigator.html).

This latest bit of good news is just another reason for The Rotary Foundation to be among our top charities of choice!

*Brian King, AGO*

**Looking Back at 2005-2006**

**Contributions Update**

Contributions for 2005-2006 totaled \$127,845,314, down **1.8%** from last year. However, contributions to the Annual Programs Fund increased **9.58%** to \$91,547,769 – **the single highest year EVER in Annual Programs Fund support!** Contributions to the Permanent Fund also increased 26.31% and Restricted Giving declined 35.68%.

<b>Contribution Comparison</b>			
	June 30, 2006 <i>Preliminary Figures Data Unaudited</i>	June 30, 2005	Increase (Decrease)
Annual Programs Fund	\$91,547,769	\$83,544,970	9.58%
Permanent Fund & Related	\$12,724,774	\$10,073,925	26.31%
Restricted	\$13,572,771	\$36,651,451	(35.68)%
<b>Total</b>	<b>\$127,845,314</b>	<b>\$130,270,346</b>	<b>(1.86)%</b>

<b>Top Five Districts by Zone – Total Contributions</b> <i>Preliminary Figures as of June 30, 2006 – Data Unaudited</i>		
Zone	District	Total Contribution
33	7770	\$710,939
33	7690	\$533,771
33	7570	\$493,598
33	7600	\$456,260
33	7680	\$371,458
34	6900	\$793,966
34	6970	\$592,964
34	6910	\$531,733
34	6960	\$504,666
34	6950	\$473,284

### Zone 33 District Contribution Summary

*As of June 30, 2006*

*Preliminary Figures – Data Unaudited*

District	APF per Capita	APF -SHARE	Restricted	Permanent Fund	Total Contributions
7530	\$99.18	\$122,983.37	\$12,955.00	\$2,420.40	\$138,358.77
7550	\$54.72	\$76,662.30	\$5,358.00	\$20,542.00	\$102,562.30
7570	\$91.55	\$371,583.24	\$64,388.91	\$57,625.47	\$493,597.62
7600	<b>\$137.45</b>	\$406,314.90	\$36,745.00	\$13,200.00	\$456,259.90
7610	<b>\$130.41</b>	\$283,260.35	\$66,579.32	\$7,893.00	\$357,732.67
7670	\$97.42	\$263,511.49	\$65,362.90	\$6,335.44	\$335,209.83
7680	\$90.08	\$280,319.70	\$64,681.73	\$26,456.60	\$371,458.03
7690	<b>\$145.57</b>	\$467,277.22	\$46,317.00	\$20,176.79	\$533,771.01
7710	<b>\$137.48</b>	\$255,024.22	\$9,455.24	\$1,950.00	\$266,429.46
7720	\$84.26	\$152,258.54	\$2,710.00	\$13,646.41	\$168,614.95
7730	\$72.68	\$152,620.43	\$7,480.00	\$0.00	\$160,100.43
7750	\$71.91	\$221,184.86	\$12,769.81	\$15,005.00	\$248,959.67
7770	<b>\$137.02</b>	\$646,710.82	\$61,460.89	\$2,767.00	\$710,938.71
	APF per Capita	APF-SHARE	Restricted	Permanent Fund	Total Contributions
<b>Total Zone 33</b>	<b>\$107.51</b>	<b>\$3,699,711.44</b>	<b>\$456,263.80</b>	<b>\$188,018.11</b>	<b>\$4,343,993.35</b>
<b>Total Zone 34</b>	<b>\$118.94</b>	<b>\$4,411,078.35</b>	<b>\$700,111.91</b>	<b>\$323,779.35</b>	<b>\$5,434,969.61</b>

### Notable Zone Rankings

*Preliminary Figures as of June 30, 2006 – Data Unaudited*

	Zone 33	Zone 34
Annual Programs Fund Giving	#6 in the world (\$3,699,711.44)	#3 in the world (\$4,411,078.35)
Per Capita Giving	#8 in the world (\$107.51 per capita)	#6 in the world (\$118.94 per capita)

### *Notable District Rankings (Preliminary Figures as of June 30, 2006 – Data Unaudited)*

- D-6960 (Zone 34): #11 in the world in per capita giving
- D-6900 (Zone 34): #19 in the world in per capita giving
- D-6930 (Zone 34): #23 in the world in per capita giving
- **D-7690 (Zone 33): #35 in the world in per capita giving**
- D-6950 (Zone 34): #36 in the world in per capita giving
- **D-7710 (Zone 33): #43 in the world in per capita giving**
- **D-7600 (Zone 33): #44 in the world in per capita giving**
- **D-7770 (Zone 33): #46 in the world in per capita giving**
  
- D-6900 (Zone 34): #18 in the world in total giving
- **D-7770 (Zone 33): #24 in the world in total giving**
- D-6970 (Zone 34): #38 in the world in total giving
- **D-7690 (Zone 33): #44 in the world in total giving**
- D-6960 (Zone 34): #50 in the world in total giving

***Paul Harris Society (PHS)***

Effective July 1, 2006, The Rotary Foundation **officially** recognized the Paul Harris Society as a district-administered recognition program. New materials are in production for the PHS but will not be available at the Distribution Center for another six weeks. Information about the PHS can be found on Rotary's website using this direct link:

[www.rotary.org/newsroom/downloadcenter/pdfs/trf\\_phs\\_brochure.pdf](http://www.rotary.org/newsroom/downloadcenter/pdfs/trf_phs_brochure.pdf)

***New Fund Development Manager***

TRF General Manager, John Osterlund, announced Don Balcom will join the Foundation staff as Fund Development Division Manager effective August 7, 2006. Don successfully led the recent \$100 million capital campaign at the Chicago Botanic Garden and served as a member of the development staff at Cornell University in New York. He succeeds current RRFC, Hogie Hansen, who retired from the Foundation on June 30.

***New Major Donor Pins***

The new diamond-shaped Major Donor pins and ladies' pendants were shipped to all Major Donors by mid-June 2006. Requests for replacement pin recognition should be directed to Simone Chong, Manager of Operations at: [simone.chong@rotary.org](mailto:simone.chong@rotary.org).

***June 30, 2006 Monthly Contribution Reports***

For the first time ever, the "final" June 30, 2006 MCRs will remain on Rotary's website throughout the entire 2006-2007 Rotary year. Club and district officers are encouraged to visit this webpage often to measure current fundraising progress toward last year's results. This report should also be helpful to all club presidents-elect when setting their Fund Development Club Goals for the 2007-2008 Rotary year.

**NEWS FOR USA ROTARIANS – STARTING OCTOBER 1, 2006**

***New Lockbox Address for Foundation Contributions – October 1, 2006***

The Rotary Foundation will have a new address to collect US Dollar contributions **effective October 1, 2006**. All clubs, districts, and individual Rotarians are asked to send contributions directly to the new lockbox at:

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

PLEASE continue to use the Foundation's headquarters address for all non-contribution related correspondence. This includes requests for Paul Harris Fellows, transfers of Foundation Recognition Points for Paul Harris Fellows, corrections to accounts and reports, completed Bequest Society and Benefactor forms, and any other general correspondence:

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

### ***New “Contact Center” Slated to Open on October 1, 2006***

Fully operational on October 1, 2006, The Rotary Foundation’s new “Contact Center” will begin answering questions posed by Rotarians in the United States via a toll-free telephone number: **1-866-9ROTARY (that’s 1-866-976-8279)**. This new pilot project, currently available only in the USA, will enable Rotarians to get their Foundation questions answered promptly. The Center will be staffed by Foundation personnel experienced in Humanitarian and Educational programs as well as Fund Development. If this new pilot project is successful, the service will expand to offer more options and more countries. Rotarians seeking contribution reports, questions on Matching Grants, Paul Harris Fellow recognition, and other general Foundation questions should be directed to the toll-free number first. The Contact Center is being managed by Clifton Healy.

## **Every Rotarian, Every Year**



***TRF-DIRECT*** is an automated giving program that enables Rotarians in the United States and Canada to make scheduled gifts to the Annual Programs Fund (APF) through a checking, savings, or credit card account. Over 1,300 Rotarians in the US and Canada currently participate in the program, and with their contributions they help increase their club and district per capita, as well as work toward Paul Harris Fellow Society and Major Donor status. ***TRF-DIRECT*** giving adds to District Designated Funds (DDF) in the years ahead, and provides more funds for projects that will attract new members. Another benefit of ***TRF-DIRECT*** is that after an individual completes the initial paperwork, The Rotary Foundation tracks all contributions and alleviates the administrative burden for the individual and the club. The growing popularity of ***TRF-DIRECT*** proves that it is a convenient and effective program for providing financial support to your Rotary Foundation.

Part of our work is to ensure that Rotarians are aware of the program and make it easy for them to enroll. By following a few simple tips, we can encourage participation and secure steady growth for Rotary Foundation programs. Please keep in mind these Do’s and Don’ts:

#### **Do:**

- Before visiting a club, make every club president aware that ***TRF-DIRECT*** is an effective way to meet the club’s APF goal, qualify as a 100% Rotary Foundation Sustaining Member club, and become an ***Every Rotarian, Every Year*** club. Ask that he or she personally enroll and emphasize the importance of leadership. Let the club president know that you would like to have individuals sign up for ***TRF-DIRECT*** on the spot.
- Include ***TRF-DIRECT*** in your presentations at Foundation Seminars. Contact me to find out who is already enrolled. Ask each person beforehand to tell the audience why he or she participates. Follow up by offering to enroll others on the spot. Have volunteers help you to distribute the forms and answer questions. By the end of your presentation, you will have new participants and they will feel good about stepping forward. This really works!
- Bring ***TRF-DIRECT*** forms with you to all speaking engagements! Here is the link to the ***TRF-DIRECT*** brochure on the RI website:  
[http://www.rotary.org/newsroom/downloadcenter/pdfs/998en\\_usa.pdf](http://www.rotary.org/newsroom/downloadcenter/pdfs/998en_usa.pdf)

### Don't:

- Even if you personally don't like automated giving, don't assume that everyone feels the same way.
- Don't leave the forms on the table and hope that they will be filled out and sent in, because they won't be! You need to promote the program.
- No need to focus on clubs that do quarterly invoicing and send in contributions in a timely fashion. **TRF-DIRECT** is best for clubs with no system or individuals who sometimes forget to send in their gifts.

With your help, we will gain greater participation in **TRF-DIRECT** this year and keep the Annual Programs Fund going strong. I hope that you will join me in presenting the option of automated giving to all Rotarians. With an average per capita gift of over \$250, **TRF-DIRECT** will certainly *Lead the Way* to success. For more information about **TRF-DIRECT** and other strategies to promote annual giving to your Rotary Foundation, please contact me.

*Brian King, AGO*

## Foundation Recognition Points (FRPs)

An existing Paul Harris Fellow (i.e. an individual who has \$1,000 or more in personal recognition credit) receives personal recognition credit for each additional contribution he or she makes to The Rotary Foundation and also receives an equal amount of Foundation Recognition Points (FRPs) which he or she can transfer to another individual. He or she receives FRP's only for contributions he or she personally makes. If the club, district, or another individual make a contribution and names them as the recipient, he or she will receive recognition credit but will not receive FRPs because he or she is not the donor of the contribution.

Additionally, when the donor transfers FRPs to another individual, the donor's FRP total decreases by the amount transferred. However their personal recognition total will never decrease. This is their cumulative personal recognition total.

Also, during the Rotary years ending June 1997 and 1998, the Trustees of the Rotary Foundation "expired" unused FRPs which were over two years old (i.e. unallocated FRPs from contributions made prior to June 1995 expired in June 1997, and unallocated FRPs from contributions made between July 1995 and June 1996 expired in June 1998. Though FRPs no longer expire, the FRPs which have expired will not be reinstated.

*For these reasons, it is important to consult the column titled "Foundation Recognition Pts" rather than the donor's personal "Recognition Amount" when preparing transfer requests in order to see how many points the donor can transfer to another individual.*

Available Foundation Recognition Points may be transferred to another individual with the donor's signature. Additionally, for living constituents who have less than \$1,000 in Recognition Amount, that recognition may be transferred to another individual with the signature of the donor. In both cases, if the donor has left the club and is still living, and the club president chooses to sign in the donor's absence, the club is accountable for point reimbursement should the donor request them.

Foundation Recognition Points from a deceased Rotarian may be transferred with the signature of a club president or family member. For deceased constituents with less than \$1,000 in Recognition Amount, that recognition may not be transferred under any circumstance.

Club contributions generate FRPs in the amount of the club contribution. As with individuals, the FRPs can be transferred at the time of the contribution or any time thereafter. As with individuals' FRP you need to consult the "Foundation Recognition Pts" column on the far right of the Club Recognition Summary (CRS) in order to determine the amount of points that the club has available to transfer.

### ***2006-2007 Every Rotarian Every Year Club Success Kit***

Each club president should have received their 2006-2007 Club Success Kit in May and June. The Kits provide helpful information to guide clubs toward achieving goals for the year. All the information clubs need can be found in the *Every Rotarian, Every Year Club Success Booklet* (958-EN) available for download in nine languages. The English link is: [www.rotary.org/newsroom/downloadcenter/pdfs/958en.pdf](http://www.rotary.org/newsroom/downloadcenter/pdfs/958en.pdf). **Additional 2006-2007**. Rotary Foundation Sustaining Member Badge stickers (956EN) can be ordered from the Distribution Center.

### ***Every Rotarian, Every Year (EREY) August 2006 Newsletter***

The August 2006 *EREY Newsletter* is being mailed to all RRFCs, DGs, DGEs, DRFCs, AGSCs, APFSAs, MGAs, RFACs, and club presidents. Everyone is encouraged to sign up to receive this newsletter via email. This is the only issue for the 2006-2007 Rotary year that will be mailed. To sign up to receive the newsletter online, go to: [www.erey.org](http://www.erey.org) and click on "Subscribe."

## **EDUCATIONAL PROGRAMS**

### **Rotary Centers for International Studies (long-term studies)**

#### ***New Class III Graduates Add to a Growing Cohort of Rotary World Peace Fellow Alumni***

Rotary World Peace Fellows graduated in May and June from Rotary Centers at University of California-Berkeley, University of North Carolina-Chapel Hill and from International Christian University. With upcoming graduations at Sciences Po and University of Bradford, the number of Rotary World Peace Fellow Alumni will soon measure close to 200. These Class III graduates will soon join their counterparts in Classes I and II and begin their work in promoting peace around the globe.

#### ***Rotary World Peace Symposium to take place in Salt Lake City***

The Rotary World Peace Symposium will take place just prior to the International Convention next June in Salt Lake City. The meeting is open to all Rotary World Peace Fellows and alumni and interested Rotarians and their guests will also be welcome. Look for more details in the months to come, but mark your calendars for June 15-16, 2007.

### **Rotary Center for Peace and Conflict Studies (short-term studies)**

#### ***The RPCS Program is still accepting applications for the January 2007 program session.***

Each district is encouraged to endorse as many applicants to TRF as they deem qualified. District endorsement of applicants is independent of the district's ability to contribute DDF to the program fund pool. Please refer to the program website at <http://www.rotary.org/foundation/educational/rpcsp/index.html> for application forms and

detailed program information. Please contact program coordinator Jenn Weidman at [Jennifer.weidman@rotary.org](mailto:Jennifer.weidman@rotary.org) or 847-866-3374 with any questions.

### ***DDF Funding for the RPCS Program***

The RPCS Program is currently accepting DDF contributions for the RPCS Fund Pool supporting fellowships for participants from low-income regions and organizations. Please help ensure that no qualified participant will be turned away due to lack of fellowship funds.

## **Ambassadorial Scholarships and Rotary Grants for University Teachers**

### ***Scholarships Fund Pool for Low-Income Countries***

All districts – both high- and low-income – are encouraged to donate any amount of DDF to the fund pool. All districts and non-districted clubs in low-income countries may submit one scholarship candidate application to compete for up to **32** Ambassadorial Scholarships awarded annually through the fund pool. All applications are considered on a world-competitive basis by a Trustee-appointed selection committee.

## **Group Study Exchange**

### **GSE: One District's Experience** **Phil Morris, Past District Governor (2005-2006)** **Rotary District 7690**

I surprised myself when I told the staff at Rotary International that my district would partner with Taiwan during my year as district governor. My only exposure to Chinese was that which was inscribed around the borders of postage stamps of a childhood collection that my mother used to teach me of current world events. The magical symbols of the Chinese language that spoke of a truly foreign culture intimidated me. And it was quite unlike me to make a unilateral decision to choose Taiwan for the 2005-2006 District 7690 Group Study Exchange partner. Yet it felt right and it took a two-minute telephone call to the Rotary International staff in Evanston to commit District 7690 to cooperating with this mysterious island.

After studying the International Assembly Directory when we arrived in Anaheim, Karen and I met our counterparts from District 3460 on our way to the president's cocktail party. An Oriental couple stepped off of the elevator we were about to board for the lobby. The similarity to the photo in the directory was striking! "Are you Mr. and Mrs. Ku from Taiwan?" I asked. A few moments of bewilderment followed recognition that in fact we had found our partners.

The friendship with Tiger Ku was really born during the session when the GSE contract was signed. We were told that if we had difficulty communicating contract details with each other we should hold up a sign so that a member of the RI staff who understood the two languages could respond and help us. At one point, I held up the laminated sign of Chinese characters and Tiger assisted by turning the page right-side up! A friendship was born!

"You will have a difficult time recruiting a team to visit Taiwan!" a past district governor informed me. Nevertheless, in September 2005 our team leader was selected: a new Rotarian from the Asheboro Rotary Club. Owen George had been an Ambassadorial Scholar several years earlier, although not to Taiwan, and he had an affinity for language. In fact he had spent several years in Taiwan teaching English. Immediately Owen's enthusiasm for the

assignment was evident and throughout the entire experience Owen brought strong leadership to the team, four young women.

From the time a Group Study Exchange team clears security checks at the airport until the team returns there is little a District Governor can do but know that the host district is doing everything possible to make the experience a “red carpet” event. Not only did the trip surpass the expectations of the travelers, but it certainly surpassed the expectations of this district governor. A week before the team was scheduled to return home, Team Leader Owen George called with news that District 3460 was contributing \$26,000 to The Rotary Foundation and had specified that the contribution would be used for a scholarship for someone from District 7690 to spend 2007-2008 in Taiwan studying language and culture. This is the first time that our district has been beneficiary of a grant from another country! And it is our understanding that Taiwan has yet to host an Ambassadorial Scholar. As we begin to realize that China & Taiwan are playing a more aggressive role in the world’s business, this scholarship should attract a great deal of interest.

A district governor couldn’t hope for a more enthusiastic Group Study Exchange team, and that was evident the moment the team leader and four excited young women reached the lobby of the Piedmont Triad International Airport. Our new friends from Taiwan were embraced everywhere they traveled. To this day we hear of how the connection continues to grow. One daughter of a host family and a team member communicate daily using instant messaging thanks to the wonderful computer technology. The team captured the hearts of everyone they came into contact with . . . fulfilling and even going beyond fulfilling their roles as ambassadors of their country, their city, their district and the Rotary clubs that nominated them.

For the first time that this district governor can remember attending since he began to attend district conferences, all members and team leaders from both inbound and outbound teams were able to attend the District 7690 Conference. Each team’s contribution to the conference program became a wonderful centerpiece to the conference activities. On Friday night the members of the District 7690 team were preparing to return to their families the next morning. The occasion of parting was celebrated as both teams shared tea by the white sands of the beach. It was quiet event, and a wonderfully spiritual way to conclude the formal contacts between the teams. And the District Governor and his wife were deeply moved when the teams invited them to join in the “tea ceremony.” Wonderful friendships have been formed. What a foundation for lifetime friendships.

The story cannot be completed yet! Shortly after our friends from Taiwan returned home, we received an invitation from District 3460 to participate in a Friendship Exchange. District 7690 has not participated in a Friendship Exchange, although the program has been promoted each year at the District Conference. Our friends in Taiwan suggest that they visit our district for two weeks late in October 2006, and have invited us to join them in March. Without doubt we can arrange to host our friends. Will we be able to assemble 3 or 4 couples who will be able to visit Taiwan in March? Time will tell and we expect that next year we will continue to tell the story of the partnership between District 7690 Piedmont North Carolina and District 3460 Taichung Taiwan.

### ***Call for Electronic Final Reports from 2005-06 GSE Teams***

A GSE is not complete without submission of the final report! TRF urges districts to send in their GSE final reports **via e-mail** including pictures. Reports should be submitted directly to the GSE coordinator at TRF **within 2 months** of the team's return to the sponsor district. The GSE chair should also send copies of this report to the subcommittee's members and governor of the sponsor district and partner district. The reports should be 2-4 pages and mention both the highlights of the team's experiences and suggestions for improvement for the host district and the program.

### ***GSE Reimbursements for 2005-06***

GSE Chairs are reminded that requests for reimbursements from the 2005-06 program year should be sent to GSE Coordinators at TRF **within 2 months** of the incurred expenditures. Payments are issued within 20 business days from the day they are received at TRF if documentation and receipts are complete.

### ***2007-08 Pairing Options***

The 2007-08 District Governors should be on their way to securing a GSE partner district for the 2007-08 program year. The 2007-08 GSE District Applications will be sent to DGEs in July and August: first electronically and then followed up by hard copy. The completed applications must be submitted to TRF by **October 1, 2006**. The GSE District Application form will be also available on the TRF website for easy download. Failure to submit the district GSE application on time can limit the chances of securing a district's first choice GSE partner. If districts need assistance in contacting potential GSE partners, they can contact their GSE coordinator at TRF.

## **HUMANITARIAN PROGRAMS**

### ***Matching Grants Stats***

In the 2005-06 Rotary year 2,024 Matching Grant applications were approved for a total award of \$20,753,816 (this figure represents the Foundation's match to DDF and cash contributions). This is a 19% increase in the amount of funds approved for Matching Grants from the last Rotary year.

### ***Overdue Reporting***

At their April 2006 meeting the Trustees of The Rotary Foundation made a number of important decisions regarding the submission of reports for humanitarian grants. The Trustees noted that an essential component of stewardship of grant funds is the preparation and submission of timely and accurate grant reports. Furthermore, the Trustees established the goal that all districts and their member clubs are consistently 100 percent current and compliant with reporting requirements.

In order to help clubs and districts reach this goal the Trustees adopted overdue reporting procedures which include sending regular reminders, listing overdue clubs on the RI website and recommending termination of clubs that have failed to report for 30 months or more. In addition, TRF will be reviewing the reporting status of districts and their member clubs on a semi-annual basis. During these reviews, districts will be evaluated according to the percentage of open grants that are current and compliant with reporting requirements. This evaluation will include all grant types. Districts and their member clubs that are less than 70 percent current and compliant with reporting requirements on two consecutive semi-annual reviews will be automatically suspended from participation in Humanitarian Grants. This decision emphasizes the ongoing responsibility that district leaders have to ensure grant funds are being utilized for their intended purposes.

It is hoped that these new procedures will assist all clubs and districts to report on grants in a timely and complete manner, paving the way for greater participation in the Humanitarian Grants Program.

### ***Suspended Districts – Humanitarian Programs***

Suspensions are put into place when districts do not meet reporting requirements 120 days after Stewardship Training. The following districts currently are suspended:

#### Zone 10

- D2200 (Spain)
- D2430 (Turkey, Azerbaijan, Kazakhstan, Kyrgyzstan, and Tajikistan)
- D2450 (Armenia, Bahrain, Cyprus, Egypt, Georgia, Jordan, Lebanon, Sudan and United Arab Emirates)
- D9150 (Burundi, Cameroun, Center African Republic, Chad, DR Congo, Equatorial Guinea, Gabon, Republic of Congo, Rwanda and Sao Tome & Pincipe)
- D9220 (Comoro Island, Djibouti, Madagascar, Mauritius, Reunion and Seychelles)

#### Zone 21

- D4270 (Colombia)
- D4280 (Colombia)
- D4300 (Peru)
- D4370 (Venezuela, Aruba and part of Netherland Antilles)
- D4690 (Bolivia)

The progress each district is making on their reporting is being monitored and a suspension will be lifted when reporting requirements have been fulfilled.

### ***Staffing Change in Humanitarian Grants***

On Friday, June 23, 2006, John Osterlund reluctantly accepted the resignation of Anne Gross as Division Manager of the Humanitarian Programs Division of the Foundation. For nearly nine years, The Rotary Foundation benefited from Anne's leadership, vision and drive in managing the burgeoning growth of our Humanitarian Programs. Anne's last day with Humanitarian Grants will be Friday, August 4. She leaves to lead a new Chicago presence for KPMG's Global Grants Division.

## **FOUNDATION ALUMNI**

### **WANTED: ROTARY ALUMNI \$10,000 R.O.I.**

**W**ho are they? Our Rotary **Alumni** are already part of the "family of Rotary". And, they have participated in some international travels in a Rotary Foundation sponsored program, such as: a) Group Study Exchange Team member; b) Ambassadorial Scholar; c) Cultural Scholar; d) Rotary Peace Fellows; and e) Rotary Volunteers. We have a \$10,000-\$26,000 investment in them, so let's look at getting some **R.O.I.**: Return On our Investment!

Where are they now? Good question...many have returned to your district, and now we want to make a conscious effort to locate them! We are getting a "last known" database from Rotary

International, and we want to update it with current contact information. So, if you know of (or have contact with) any of these Rotary Alumni, please pass this information to your District Alumni Coordinator.

What kind of R.O.I? Well, first let's reintroduce them to the many benefits of Rotary. Invite them to your club to make a presentation on their Rotary "experience". They would love to tell you all about it! And, many of your members would be able to see how "their investment" has matured. Your new members can see the benefits of these Foundation programs and the resulting Alumni. Then follow up, and **ASK** them to join your club. And finally, **ASK** them to make a contribution to The Rotary Foundation (every year), to provide someone else the same kind of experience they had as a Rotary Foundation program participant.

And, if you have any questions about this Rotary Alumni R.O.I. effort, please contact your RFAC (Rotary Foundation Alumni Coordinator) for Zone 33, Mike Thacker ([PDG@MikeThacker.com](mailto:PDG@MikeThacker.com)).

## YOUR ZONE 33 FOUNDATION TEAM

### Regional Rotary Foundation Coordinator

#### *PDG Anne L. Matthews*

E-mail: [almjmmjlm@aol.com](mailto:almjmmjlm@aol.com)  
Home: 803-782-4225  
HFax: 803-782-7385  
Cell: 803-767-3938

### Gift Advisors

#### *PDG Sandra (Sandy) Duckworth*

E-mail: [sandraduckworth@hughes.net](mailto:sandraduckworth@hughes.net)  
Home: 540-361-1680  
HFax: 540-361-1681

Sandy is responsible for Districts 7530, 7550, 7610.

#### *PDG Joe Mulkerrin*

E-mail: [joemulkerrin@cox.net](mailto:joemulkerrin@cox.net)  
Home: 757-467-9475  
Office: 757-523-2738 x330  
OFax: 757-523-2810

Joe is responsible for Districts 7600, 7570, 7690, 7710.

#### *PDG Tom Payne*

E-mail: [tompayne@gotricounty.com](mailto:tompayne@gotricounty.com)  
Home: 252-946-4922  
Office: 252-946-5184  
OFax: 252-946-6448

Tom is responsible for Districts 7680, 7720, 7730.

#### *PDG Johnny Robertson*

E-mail: [johnsfuel@earthlink.net](mailto:johnsfuel@earthlink.net)  
Home: 910-843-2802  
Office: 910-843-5211  
OFax: 910-843-8114

Johnny is responsible for Districts 7670, 7750, 7770.

## **Foundation Alumni Coordinator**

### *PDG Mike Thacker*

E-mail: [pdg@mikethacker.com](mailto:pdg@mikethacker.com)

Home: 252-257-1401

Office: 252-257-2563

Mike is responsible for all the Districts in Zone 33

## **Grants Advisor**

### *PDG Ron Ferrill*

E-mail: [ron\\_ferrill@alumni.utexas.net](mailto:ron_ferrill@alumni.utexas.net)

Home: 276-632-6737

HFax: 276-632-2445

Ron is responsible for all the Districts in Zone 33

## **District Trainer Advisor**

### *Randy Lickey*

E-mail: [rlickey@williamsmullen.com](mailto:rlickey@williamsmullen.com)

Home: 804-360-1043

Office: 804-783-6424

OFax: 804-783-6507

Randy is responsible for all the Districts in Zone 33

## **Major/Planned Gifts Officer**

### *Jackie McGuire*

E-mail: [mcguirej@rotaryintl.org](mailto:mcguirej@rotaryintl.org)

Phone: 847-866-4450

## **Annual Giving Officer**

### *Brian King*

E-mail: [kingb@rotaryintl.org](mailto:kingb@rotaryintl.org)

Phone: 847-866-3146

## **Development Services Representative**

### *America Ulmo*

E-mail: [ulmoa@rotaryintl.org](mailto:ulmoa@rotaryintl.org)

Phone: 847-866-3378

## **Zone 33 Foundation Newsletter Editor**

### *PDG Kay Oldhouser*

E-mail: [kayo@uscsumter.edu](mailto:kayo@uscsumter.edu)

Home: 803-469-0960

Office: 803-938-3746

OFax: 803-938-3706