

The Rotary Foundation: information sheet for Club Secretaries

Context

All Rotarians are encouraged to contribute annually to The Rotary Foundation (TRF) and as a District we encourage Rotarians to become 'Centurions' donating NZ\$100/year.

Individuals contribution payments can be made through the Club Treasurer, directly to District through the District Foundation Administrator or via My Rotary. However, a tax receipt can only be provided for **donations made via district only**. District 9930 encourages all clubs and Rotarians to make their payments to TRF through the District Administrator. Treasurers should ensure that all individual payments made to TRF clearly identify the individuals name and the fund the donation is to be paid to, if the Rotarian has a preference.

- Where no preference is stated payments will be made to the Annual Fund
- PolioPlus contributions do NOT count to the 'Every Rotarian Every Year' or TRF Sustaining Member
- Rotarians can divide their contributions between different funds
- Rotarians can access their personal Donor Report in My Rotary.

Paul Harris Fellows (PHFs) are awarded to recognise a donation of US\$1,000 made to the TRF from either an individual or a club

1. Individual contribution PHFs, sapphire and ruby pins

These just 'turn up' in the post addressed to the President when a Rotarian's individual contributions reach US\$1,000. It is **essential** that the President reads the accompanying letter and discusses with the Rotarian their preferred option for their PHF Award. The PHF award can either be:

- a) Presented to the Rotarian e.g. at a club meeting
- b) Handed to the Rotarian with no presentation
- c) Transferred to any other individual, in their name. The Rotarian chooses who, and discusses with the President, how that presentation will be made. RI will need to be informed to transfer the PHF and send an appropriate PHF certificate. Do this by email to: risppo@rotary.org

N.B. AN INDIVIDUAL CONTRIBUTION PHF IS NOT PRESENTED TO THE ROTARIAN AS SERVICE AWARD

2. Club awarded PHF's, sapphire and ruby pins

Once a Board of Directors has approved a PHF award in recognition of community or Rotary service, the Secretary submits a completed **PAUL HARRIS FELLOW RECOGNITION TRANSFER REQUEST FORM** to the RI Zone office in Parramatta, Sydney. This form is available:

- In My Rotary – Learning and Reference – Document Center AND
- D9930 TRF Forms and downloads page <http://rotary9930.org/Page/rotary-foundation-forms-downloads>

It is a writable pdf so you can fill it in digitally then print it so you can sign it. The form is then scanned and emailed to the RI Zone office at risppo@rotary.org

If this is the individuals' first award RI will send a certificate and PHF pin. If a subsequent award they will send a pin with appropriate number of sapphires/rubies but no certificate.

Paul Harris Fellow recognition medallions must be ordered separately from the RI Zone office, at US\$15.00 each. Clubs may choose to order several at a time so they have a spare in stock, or order each medallion with specific PHFs. PHFs medallions are not available from RDU supplies. (RDU is a separate office).

Contact details for the RI Zone Office staff can be found here: <http://rotaryoceania.zone/page/ri-regional-office>

Additional useful information

Contributions to the Annual Fund, PolioPlus, the Endowment Fund and some other approved grant activities are all eligible for recognition.

TRF contributions are recognised as follows:

- **Every Rotarian, Every Year** program applies only to contributions to the Annual Fund. Minimum US\$25.00 (approx. NZ\$40) to qualify. (PolioPlus contributions do NOT count towards EREY)
- **Centurion**: a commitment to give NZ\$100 annually
- **Rotary Foundation Sustaining Member** is a commitment to give US\$100 annually to the Annual Fund
- **Paul Harris Fellow (PHF)**: (accumulated) contribution of US\$1,000 to Annual Fund, PolioPlus or an approved TRF grant
- **Multiple PHF**: for each cumulative US\$1,000 (sapphire and ruby pins)
- **Paul Harris Society**: a commitment to give US\$1,000 annually
- **Major Donor**: accumulated individual giving reaches US\$10,000 (level one. Further recognition is given at higher levels)

Contributions deposited in the 9930 Foundation Account are transferred to The Rotary Foundation at the RI Zone office in Parramatta once a month via the Guardian Trust.

Links

- TRF Recognition explained in more detail: <https://www.rotary.org/en/donate/recognition>
- District 9930 Foundation page: <http://rotary9930.org/Page/rotary-foundation-giving>
- All the forms you need are at: <http://rotary9930.org/Page/rotary-foundation-forms-downloads>
- To check **club** giving:
 - Go to www.rotary.org and sign in to My Rotary
 - In the menu click on *Rotary Club Central*
 - Click on *Reports* in left-hand column
 - Click *Rotary Foundation Giving* tab at top and click on *Club Fundraising Analysis*
 - Click on current month and then the small right arrow at top left of that column to add the month to the right column, then click OK
 - You can now see your clubs giving
- To check **your individual** giving:
 - Go to www.rotary.org and sign in to My Rotary
 - Click on Profile
 - Click on Donor History Report. This will give you an overall view of your contributions to the Rotary Foundation
- To access **Club Recognition Summary** (i.e. PHFs etc)
 - Go to www.rotary.org and sign in to My Rotary
 - In the menu click on *Manage*
 - Scroll down to Contributions and Recognition, and under Club Giving click *View reports*
 - Click *Club Recognition Summary*
 - Once that opens you will be able to see a list of your members. (It is worth checking and advising RI of any discrepancies)
 - Under the column *Foundation Pts Available* you can see in the first row how many 'PHF credits' your club has.
 - You can also access this report through the Rotary Foundation menu and Rotary Club Central

District Foundation Administrator

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