



## ZONE 33 ROTARY FOUNDATION TEAM NEWSLETTER

*PDG Kay Oldhouser Davis, Editor*

May 2009

### **THE COUNTDOWN IS UPON US FOR THIS ROTARY YEAR**

The 2008-09 Rotary year is almost over, and we still have much to do to reach the goals established by the districts. There is information in this newsletter, prepared by Kay, to help you keep informed on TRF activities and deadlines. There are charts dealing with your district's contributions through March. Sorry we do not have the latest data to share with you for April in the format displayed below. Of course, you can access the web site and download the latest data for each club in your district.

Please give attention to those clubs that have not contributed to the Annual Giving Fund thus far this Rotary year. We need every club to contribute funds to the Annual Giving Fund in order to meet the Zone goal of 100 percent of all clubs contributing to the Annual Giving Fund. You can make this happen by making contact with those clubs.

The Zone Foundation Training Seminar is scheduled for the first weekend in June. Plan to attend and participate in the Seminar. Bring your whole district team. Information on registration and hotel are located in this newsletter.

Congratulations are extended to PDG Rich Waugh, D7750, and PDG Jim Pierce, D7600. They will be joining incoming RRFC Joe Mulkerrin's team as Assistant Regional Rotary Foundation Coordinators (ARRFCs) beginning July 1. PDG Tom Payne will serve as the Regional Rotary Alumni Coordinator (RFAC), replacing PDG Mike Thacker. PDG Rocky Jacobs will continue serving as Polio Challenge Coordinator. Joe has a great team with PDG John Beckett and PDG Ron Ferrill remaining on the team as ARRFCs.

My sincere **THANK YOU** for all your efforts on behalf of the Foundation. We need to push a little harder during these remaining weeks and meet the goals all of you established last spring. Try to increase the *per capita* in your districts and exceed the amount for last year. You are **Making Dreams Real** daily for thousands in the world you will never meet personally. **Doing Good in the World**, our Foundation's Motto, is what we are about in Rotary.

As always, please contact any of the Zone Foundation Team for assistance, if needed.

Best wishes,

Anne  
Zone 33 RRFC

# Every Rotarian, Every Year

## APF-SHARE District Activity Report Highlights

Zone 33

Report for March 2009

District	Members 2008-09	YTD 2008-09 APF-SHARE	YTD 2007-08 APF-SHARE	YTD % Change	YTD 2008-09 APF Per Capita	2007-08 APF Per Capita	2008-09 \$0 Giving Clubs
7530	1,203	\$64,616.39	\$72,747.19	-11.2%	\$53.71	\$100.17	5
7550	1,306	\$44,402.80	\$56,826.03	-21.9%	\$34.64	\$74.16	13
7570	3,891	\$208,039.45	\$268,848.66	-22.6%	\$53.47	\$115.12	23
7600	3,039	\$233,783.84	\$281,079.20	-16.8%	\$76.93	\$173.32	4
7610	2,260	\$187,425.93	\$240,218.27	-22.0%	\$82.93	\$176.44	4
7670	2,677	\$156,673.67	\$195,178.87	-19.7%	\$58.53	\$121.62	10
7680	3,025	\$215,521.13	\$203,253.74	6.0%	\$71.25	\$116.72	4
7690	2,999	\$270,761.83	\$260,354.56	4.0%	\$90.28	\$144.56	3
7710	1,847	\$146,537.36	\$155,595.06	-5.8%	\$79.34	\$147.64	7
7720	1,781	\$109,767.70	\$138,744.17	-20.9%	\$61.63	\$120.36	0
7730	2,007	\$107,315.04	\$123,795.13	-13.3%	\$53.47	\$121.68	7
7750	2,975	\$230,606.06	\$167,025.80	38.1%	\$77.51	\$95.66	7
7770	4,570	\$402,994.55	\$581,190.48	-30.7%	\$89.49	\$194.16	0
<b>TOTALS</b>	<b>33,580</b>	<b>\$2,378,445.75</b>	<b>\$2,744,857.16</b>	<b>-13.3%</b>	<b>\$71.02</b>	<b>\$137.03</b>	<b>87</b>

### Planned and Major Gift Information

Below are two Planned and Major Gift tables. The first list the 2008-09 Planned and Major Gift goals which reflect the cumulative total of goals reported by the district clubs on the Fund Development Goal Report Form. The second table summarizes the 2008-09 results as of March 31, 2009.

### 2008-2009 Planned and Major Gift Goals

District	Major Gifts (\$10,000+) 2008-09 Goal	Bequest Society Members 2008-09 Goal	Benefactors 2008-09 Goal
7530	0	0	1
7550	1	1	5
7570	2	3	24
7600	6	10	24
7610	6	8	18
7670	7	14	40
7680	4	6	14
7690	7	5	21
7710	1	2	8
7720	1	1	1
7730	1	5	14
7750	3	5	20
7770	6	14	31
<b>TOTALS</b>	<b>45</b>	<b>74</b>	<b>221</b>

## Planned and Major Gift District Activity Report Highlights

Zone 33

Report for March 2009

District	Permanent Fund (Outright) YTD	Permanent Fund (Outright) LYTD	PHS Prospects YTD (\$1000+ Donors)	Paul Harris Society Members	Major Donors 2008-09 (new)	Life Income Agrmnts. (new)	Bequest Society Members 2008-09 (new)	Benef. 2008-09 (new)
7530	\$0.00	\$445.40	15	5	0	0	0	0
7550	\$100.00	\$200.00	3	3	0	0	0	0
7570	<b>\$17,806.87</b>	\$11,272.36	47	12	0	0	1	6
7600	\$4,000.00	\$4,000.00	47	76	0	0	4	57
7610	\$2,000.00	\$100,909.00	44	68	1	0	1	4
7670	\$9,300.00	\$14,125.00	50	31	0	0	6	9
7680	\$8,885.38	\$7,205.00	48	32	<b>3</b>	0	0	9
7690	\$7,276.79	\$13,276.79	46	53	0	0	2	<b>134</b>
7710	\$1,508.00	\$27,393.00	34	5	<b>3</b>	0	1	3
7720	\$1,100.00	\$10,100.00	21	18	0	0	0	0
7730	\$100.00	\$200.00	7	6	0	0	1	3
7750	\$0.00	\$4,750.00	37	7	0	0	3	26
7770	\$2,190.00	\$4,235.50	108	<b>226</b>	<b>3</b>	0	<b>32</b>	105
<b>TOTALS</b>	<b>\$54,267.04</b>	<b>\$198,112.05</b>	<b>563</b>	<b>??</b>	<b>10</b>	<b>0</b>	<b>51</b>	<b>356</b>

# Foundation Recognition Points

### Important Changes Effective July 1, 2009

1. Minimum Foundation Recognition Point transfer allowed will be 100 points.
2. President of Club can no longer sign the Transfer form 102-EN to transfer a member's points to another individual. \*\*

*\*\* However, TRF will accept an email exchange between the President and a Rotarian or inactive member approving the transfer and this email can be sent along with the Transfer form 102-EN. Of course, an individual Rotarian can always sign the transfer form to transfer Recognition Points to another individual. That is the ideal process.*

*\*\* Regarding a series of transactions from one account holder, TRF will accept a copy of a brief letter authorizing transfers with the account holder's signature. The authorized person simply keeps the original and faxes/emails the copy, along with the transfer request form to TRF each time a request is made.*

3. Deceased Rotarians Recognition Points will expire.

## Action Items Between Now and June 30, 2009

- Review your Contribution Recognition Summary including active and inactive or deceased members.
- Identify those deceased and inactive members that have Recognition Points available.
- The President can sign and immediately transfer points of deceased Rotarians. If unable to contact inactive members, the President can sign and transfer points to other individuals.
- **Use this opportunity to request matching points from club members. Ask the members to contribute to TRF and secure a match for each dollar with Recognition Points. This is a great way to help a member become a first Paul Harris Fellow or to reach the next PHF level.**

### **June 30, 2009 Contribution & Reclass Deadlines**

For contributions to be credited for the 2008-09 Rotary year, the following Foundation guidelines must be followed:

- **Checks sent to World Headquarters (WHQ) Lockbox:** must be postmarked by June 30, 2009 or prior and received at the lockbox by Tuesday, July 7, 2009.
- **Checks sent to WHQ:** must be postmarked by June 30, 2009 or prior and be delivered to the Accounts Receivable (AR) Department on the 11<sup>th</sup> floor by 3 pm on Monday, July 6, 2009.
- **Wire transfers:** must be initiated prior to June 30, 2009 and received in the bank by July 3, 2009.
- **Credit Cards:**
  - **Online via Rotary.org** – must be authorized prior to midnight, June 30, 2009. (Please keep in mind that gifts received via the web will only benefit the Rotarian who logged in. Reclass and redistribution request, also known as corrections, can not be accepted for these gifts.)
  - **Via fax, phone or mail to WHQ** – must be received by the AR Department and authorized prior to the close of business on June 30, 2009.
  - **Via the Bank of America lockbox** – must be received at the lockbox prior to the close of business on June 30, 2009. Credit card contribution requests received in lockbox batches with deposit dates after June 30, 2009 will be considered July 2009 gifts. Please stress that credit card contribution requests should not be sent to the lockbox; rather they should be faxed to 847-556-2139 to ensure timely recording, or completed online at [www.rotary.org](http://www.rotary.org).
- **Reclasses/Redistributions:** Request must be received in the TRF Corrections email box prior to 5 pm on Monday, July 6, 2009.

Any contributions received after the dates listed above will be entered for 2009-10. Please remind Rotarians in your district to submit their contributions early, allowing 7-10 days for postal delivery.

**ZONE 33 THE ROTARY FOUNDATION TRAINING SEMINAR**

**JUNE 5 & 6, 2009**



**HILTON NORTH RALEIGH**

**WHO:** ALL DGS, DGE'S, DRFC COMMITTEE CHAIRS, DRFC SUB-COMMITTEE CHAIRS. Anyone interested in becoming involved in The Rotary Foundation.

**WHEN:** June 5 & 6. Noon Friday to Noon Saturday

**HOW TO REGISTER:** See other block in this Newsletter for the Hotel and the Seminar information

**HEAR:** Eric E. Adamson, Rotary International Zone 33/3 Director (2008-10)  
Ann Lee Hussy, Chair –Polio Survivors & Associates Rotary Action Group

**THE ZONE 33 ROTARY FOUNDATION SEMINAR**

**Friday Noon to Saturday Noon – June 5-6, 2009**

**Hilton North Raleigh**

**MARK YOUR CALENDARS – BETTER YET REGISTER TODAY**

**Hotel Registration Is Available Now**

**Call 919-872-2323**

**Special \$85 Rate – Refer to Group Code: RTC**

**Or Go Direct On-Line**

**Original Offer expired May 5**

**Deadline has been extended to May 15.**

<http://www.hilton.com/en/hi/groups/personalized/RDUNHHF-RTC-20090604/index.jhtml>

**Seminar Registration**

**GO TO YOUR DandC DATA BASE CALENDAR**

**Rotarian \$66. Guest To Include Friday Dinner \$36.**

**Expect Coverage for Every District Foundation Committee Chairperson**

## **TRF Update: Foundation Funding Cut for Some Programs**

During the April meeting, The Rotary Foundation Trustees examined how the current global economic crisis has affected the Foundation's ability to support Rotarian's good work worldwide. In determining the program and operations budgets for 2009-10, the Trustees made some very difficult decisions. One of the decisions was to accelerate the elimination of several programs slated to be discontinued in 2010-11. Effective July 1, 2009, the Foundation will no longer fund the following:

- **Rotary Grants for University Teachers**, except for grants already awarded
- **Volunteer Service Grants**
- **Cultural and Multi-year Ambassadorial Scholarships**, except for grants already awarded

In addition, the World Fund allocation for Matching Grants was reduced to US\$9.5 million for 2009-10, about 70 percent less than the original budget for 2008-09. Click on [http://www.rotary.org/en/StudentsAndYouth/EducationalPrograms/Announcements/Pages/foundation\\_funding\\_annnc\\_6may09.aspx](http://www.rotary.org/en/StudentsAndYouth/EducationalPrograms/Announcements/Pages/foundation_funding_annnc_6may09.aspx) to read the entire May 6, 2009 message from Trustee Chairman Jonathan Majiyagbe.

---

## **Memorial and Tribute Gifts**

A gift to The Rotary Foundation for a loved one is a meaningful way to honor or memorialize that person. Tribute gifts can be a perfect birthday, wedding, or holiday gift for the person who has everything.

Why not let your gift build a bridge of hope for those less fortunate around the world? Your generosity can provide food for a hungry child, clean water for an entire village, medicine for the sick, and thousands of other good works in our global community.

When you make a tribute or memorial gift, The Rotary Foundation will send a letter to the recipient or the recipient's family to let them know about your gift. The amount of your gift is not disclosed. TRF also will send an acknowledgment to you as the donor. You will receive a separate tax receipt for gifts above \$25.

Below are the links to the new Memorial and Tribute page on the RI website:

[http://www.rotary.org/en/contribute/contributenow/memorial\\_tribute\\_gifts/pages/ridefault.aspx](http://www.rotary.org/en/contribute/contributenow/memorial_tribute_gifts/pages/ridefault.aspx)

[http://www.rotary.org/en/contribute/contributenow/memorial\\_tribute\\_gifts/pages/onlinememori](http://www.rotary.org/en/contribute/contributenow/memorial_tribute_gifts/pages/onlinememori)

---

***Can I roll-over IRA funds to my DAF without being taxed?***

Not yet. A bill (HR 1250) was introduced in Congress in March to allow individuals to make tax neutral contributions to donor advised funds as a charitable rollover gift from their IRA accounts. We will keep you updated on the status!

---

**SEND ALL FOUNDATION FUNDS TO:**

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

## YOUR ZONE FOUNDATION TEAM

### Foundation Contact Center

(866) 976-8279  
[contact.center@rotary.org](mailto:contact.center@rotary.org)

### Jackie McGuire

Major Gifts Officer  
(847) 866-4450  
[Jackie.Mcguire@rotary.org](mailto:Jackie.Mcguire@rotary.org)

### Joanne Bertsche

Annual Giving Officer  
(847) 866-3146  
[Joanne.Bertsche@rotary.org](mailto:Joanne.Bertsche@rotary.org)

### Karena Bierman, J.D.

Senior Planned Giving Officer  
(847) 866-3100  
[Karena.Bierman@rotary.org](mailto:Karena.Bierman@rotary.org)

---

### Zone 33 Regional Rotary Foundation Coordinator (RRFC): **Anne L. Matthews**

(803) 782-4225                      Cell: (803) 767-3938                      e-mail: [almjlm@aol.com](mailto:almjlm@aol.com)

### DISTRICTS: 7530, 7550

Gift Advisor: **John Beckett**  
(304) 324-3348                      e-mail: [jbeckett@firstcentury.com](mailto:jbeckett@firstcentury.com)

### DISTRICTS: 7600, 7610, 7690

Gift Advisor: **Joe Mulkerrin**  
(757) 467-9475                      e-mail: [joemulkerrin@cox.net](mailto:joemulkerrin@cox.net)

### DISTRICTS: 7570, 7750 & GRANTS

Gift Advisor: **Ron Ferrill**  
(276) 632-6737                      e-mail: [ron\\_ferrill@alumni.utexas.net](mailto:ron_ferrill@alumni.utexas.net)

### DISTRICTS: 7680, 7710, 7720

Gift Advisor: **Tom Payne**  
(252) 946-5178                      e-mail: [tompayne@gotricounty.com](mailto:tompayne@gotricounty.com)

### DISTRICTS: 7670, 7730

Gift Advisor: **Johnny Robertson**  
(910) 843-8574                      e-mail: [johnsfuel@earthlink.net](mailto:johnsfuel@earthlink.net)

### DISTRICT: 7770

Gift Advisor: **RRFC Anne L. Matthews**  
(803) 782-4225                      e-mail: [almjlm@aol.com](mailto:almjlm@aol.com)

### ROTARY'S \$100 MILLION CHALLENGE

Zone 33 Challenge Coordinator: **Rocky Jacobs**  
(252) 964-6099                      e-mail: [pungoriv@gotricounty.com](mailto:pungoriv@gotricounty.com)

### ROTARY FOUNDATION ALUMNI COORDINATOR (RFAC)

Zone 33 RFAC: **Mike Thacker**  
(252) 257-2563                      e-mail: [mike@mikethacker.com](mailto:mike@mikethacker.com)

### PAUL HARRIS SOCIETY ZONE COORDINATOR

Zone 33 PHSC: **Lou Mello**  
(843) 849-5651                      e-mail: [lou.mello@oocl.com](mailto:lou.mello@oocl.com)

### ZONE 33 FOUNDATION NEWSLETTER EDITOR

Zone 33 Foundation Newsletter Editor: **Kay Oldhouser Davis**  
(803) 938-3746                      e-mail: [kayo@uscsumter.edu](mailto:kayo@uscsumter.edu)