

DISTRICT 6900 FOUNDATION SEMINAR

August 15, 2009

Presented by:

Carol & Hector Colón

Role of the District 6900 Annual Giving Co-Chairs:

The annual giving committee assists the DG, AGs, club presidents, foundation reps, and foundation chairs in achieving the minimum APF US \$100 per capita goal, actively promotes the Rotary Foundation Sustaining Member program at district and club functions, make club visits and monitors noncontributing clubs and district fundraising projects, helps identify and solicit potential major Donors for challenge gifts; and shares contribution report information. Simply put, we have been asked to educate, motivate, and cultivate. Please feel free to contact us if you have any questions or need any assistance with completing any paperwork.

The Colón residence is 770-461-4407; Carol cell 678-523-8865; Hector cell 678-778-2131.

E-mail address: CarolMColon@aol.com and HLColon@aol.com

Preferred e-mail address is CarolMColon@aol.com

Please order the following brochures for distribution to your club:

Every Rotarian Every Year 957-EN-(207)

TRF Direct Donations USA 998-EN-USA-(109)

There are several ways to give to the Rotary Foundation:



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[Online contributions](#)

Gifts can be made easily with The Rotary Foundation's online contribution form. Go to www.rotary.org and have your TRF number (also referred as your Membership ID number) and credit card information available. Please check the box for Annual Programs Fund. Additionally, you can monitor your contribution history from this web site. TRF/Membership ID numbers may be obtained from the club secretary and are also listed on the Club Recognition Summary (CRS). Also, TRF #s can be found on the address label of your Rotarian magazine. Note: Currently, current card contributions can be made online only by individuals, but not by clubs.

- By enrolling in TRF-DIRECT, you can automatically transfer funds electronically from your checking account or credit card account. Please refer to brochure titled TRF Direct Donations USA.
- You can write a personal check made payable to The Rotary Foundation, and send it with a completed TRF Global Contribution Form to the appropriate address: The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL 60693. Please see directions below if the Club Treasurer or Club Foundation Chair submits the contribution in the form of a check on behalf of the club and/or the Rotarian(s).
- To make a contribution with your credit card, complete the following: In the United States, download the [U.S. credit card contribution form](#) (PDF) from rotary.org and fax it to 847-328-5260.

COMPLETING TRF CONTRIBUTIONS FORMS

Form 123-EN, TRF Global Contribution Form. If you go to rotary.org you can easily locate this form. Go to the Blue Box at the top right hand corner of the first page of Rotary website. This area is called the Membership Access Portal or MAP. Input your TRF# and hit member access. Please select Personalized Contribution Form on the next screen. Now, select one of the following: Generate Pre-Populated Form or Generate Blank Form. The pre-populated form automatically completes the general information like name, TRF #, address, Club # and District #. This saves time.

If a contribution is being made in the club's name, please select Generate Blank Form and complete by hand. ***Under Section II, Donor of Contribution***, please notate the club number and District.

Always document the contact information for the individual completing the form in case The Rotary Foundation has a question regarding the contribution. Please make sure that the club's designated officers (President, Secretary, Treasurer and Foundation Chair) are registered so they can download and review reports.

When do you use this form? You generate the form if you are submitting a check or authorizing a credit card payment for a TRF contribution. This form is not used if you are merely making an online contribution in your name. *Please note that Recipients of Paul Harris Fellow Recognition credit can be named at the time of the gift or at a later time by request from the account holder or club president.*

Additional Features of Form 123-EN

Section III, Recipient of Paul Harris Fellow Recognition Credit would be completed at this time if the Rotarian contribution gives the Rotarian or other individual enough recognition points to name a Paul Harris Fellow recipient.

Section V, Recognition Points Transfer is used only if you are supplementing recognition points from a club, district, or individual. However, you must obtain an authorized signature. The club president is authorized to sign for the club and the district governor has the authority to sign if recognition points are given from the district.

We would like to emphasize that as of July 1, 2009 the club president can no longer sign for member's (past or present) recognition points. Also, as of July 1 the minimum number of points per transfer is 100.

Example of when you would use Section II, Section III, and Section V. You are already a PHF and you are making a \$250 contribution to the APF. Your name goes in the **Section II, Donor Contribution** section because you receive donor credit and gift receipt. You desire to give this recognition credit to a fellow Rotarian so you complete their information including name, ID#, address, club number and district in **Section III, Recipient of Paul Harris Fellow Recognition Credit**. If the club, district, or individual matches or supplements with Foundation Recognition Points, **Section V, Recognition Points Transfer** needs to be completed and signed by the authorized individual. If there are multiple transfers of recognition, please complete a Recognition Transfer Request.

After completion, Form 123-EN, TRF Global Contribution Form is mailed to The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL 60693 USA. Please keep a copy for your records and notify your Club Foundation chair. After the check is processed, the paperwork is sent To TRF for posting. It will take several weeks for this contribution to appear on the EREY Eligibility Report and Club Recognition Summary (CSR).

Exception: All Paul Harris Society member contributions should be mailed directly to PHS Chair, Bob Hagan along with a completed PHS form. Please refer to attachment(s) regarding instructions for Paul Harris Society Members for District 6900.

Form 102-EN, Recognition and Transfer Request. After completion of this form, please send to Donor Recognition, The Rotary Foundation, One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201-3698 USA or FAX to 847-328-5260. The purpose of this form is to transfer recognition points from a club, district, or another Rotarian. Points can only be transferred once. Transfers can occur only between individuals or from a club or district to an individual account.

When do you use this form? You generate this form when a Rotarian is transferring their Foundation Recognition Points (FRPs) to a recipient. The signature of the individual is required. Also, a club or district could also transfer their Foundation Recognition Points to a recipient. An authorized signature is required for these transfers. Remember to document the individual that completes this form. Please complete Section 3 if recognition is requested. Please indicate where the recognitions materials should be mailed. Otherwise, all materials will be sent to the last address of the Club President.

The Rotary Foundation Multiple Donor Form. Only the President, Secretary, Treasurer, and Club Foundation Chair have access to this form online. Under the multiple donor form, chose "generate pre-populated form". You should now see a list of all possible donors in your club. Choose those who are part of this contribution. *If one of the above designated officers does not have authorization to these reports, the **President** should add them in Member Access under UPDATE CLUB DATA or send a request to data.corrections@rotary.org to add that person.*

After completion, The Rotary Foundation Multiple Donor Form is mailed to The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL 60693 USA with your club check. Please keep a copy for your records and notify your Club Foundation chair. After the check(s) are processed, the paperwork is sent to TRF for posting. It will take several weeks for this contribution to appear on the EREY Eligibility Report and Club Recognition Summary (CSR).

One of the club reports available from the District Database is similar to the Multiple Donor Form. It is called "The Rotary FOUNDATION Transmittal (TRF)." This generates a report with membership numbers and a blank to fill in the amount. It can be sent to Excel or Word. The President, Secretary, Treasurer, and Club Foundation Director should have access to this form from the District Database.

Extra Tips:

The following statement should help you understand the overall process of completing the contribution forms: **Please note that once a person becomes a Paul Harris Fellow, every dollar he/she donates above the initial \$1,000 gets a Foundation Recognition Point (FRP) that he/she can give to another person. FRPs are only derived from cash contributions made after becoming Paul Harris Fellows.**

We have had good results faxing and/or emailing **Form 102-EN, Recognition and Transfer Request**. When only points transfer is involved this seems to move through the system quicker. We like emailing a PDF copy of the completed form because you get a return receipt. We like to think of this as "Traceability" and "Track ability".

Go to rotary.org and you can download reports all year long at whatever inconvenient hours you choose to do your Rotary work. It is easy to register, so inform the President, Secretary, Treasurer and Club Foundation Chair of their capabilities.

From past experience, District 6900 tries to send their contributions to The Rotary Foundation shortly before the district conference and expect to get immediate credit. Please allow at least three weeks for your contribution to be posted.

Please feel free to contact Carol or Hector if you need any assistance with completing the forms. **Foundation Recognition Points Fact Sheet** can be found on the Rotary web site for further reference. This is an excellent tool for understanding how recognition points work.

Lastly, please call or e-mail the Foundation's Contact Center at 1-866-9ROTARY (1-866-976-8279) or contact.center@rotary.org. A team of Foundation specialists will answer calls Monday through Friday, 8 a.m. to 5 p.m. Central Time.

The Rotary Foundation is YOU ---EVERY ROTARIAN, EVERY YEAR. Your Gift to the World.