

## AN OVERVIEW

Commencing July 1, 1999, each donor who annually contributes \$1,000 to The Rotary Foundation will be recognized with membership in The Paul Harris Society. Society members will receive District-wide recognition, and a distinctive gold and blue lapel banner, which can be worn with their Rotary pins.



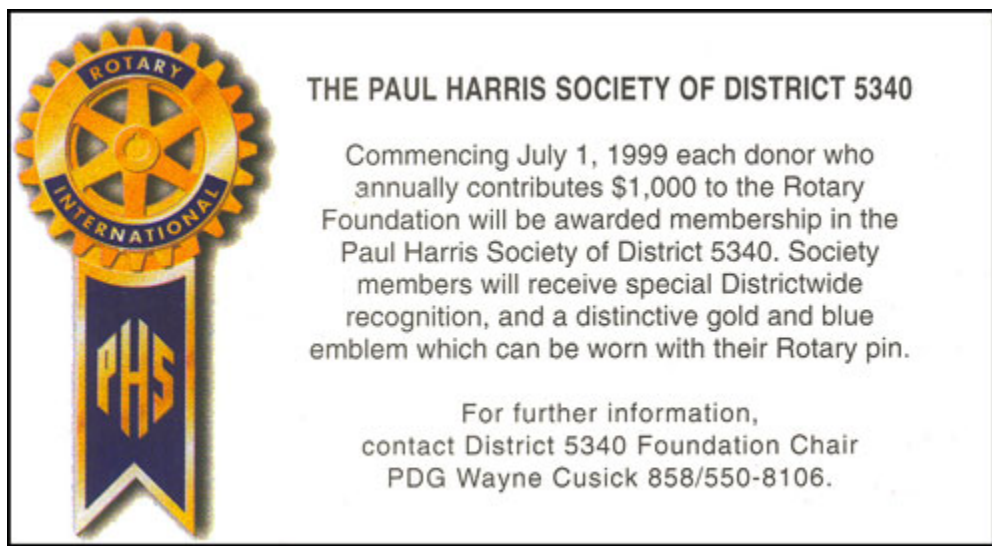
This new level of recognition will not be suitable for every Rotarian but is available for those donors who chose to give at this level each Rotary year. Our ever-increasing involvement and support of Rotary Foundation Programs necessitates our need for increasing amounts of Annual and Restricted Giving. Permanent Fund contributions do not qualify for this program. Only new contributions qualify.

This program is not an officially recognized Rotary International Program. But, it seems this program is being embraced by Districts across the United States as a means of greater donor recognition and contributions to The Rotary Foundation.

If I can be of further assistance in helping you set up your own Paul Harris Society in your District, please contact me via email [mrgoodgas@aol.com](mailto:mrgoodgas@aol.com) or phone 858-550-8106.

Best wishes!

Wayne C. Cusick PDG  
District 5340



**Sample of 3x5 card**

## THE MARKETING PLAN

### Phase I

First, I developed a Phase I Marketing Plan and presented the idea and the Plan to our District Leadership in early 1999. The Leadership readily bought into this whole program which went something like this:

-June 1999: introduce The Paul Harris Society of 5340 to our twelve Foundation Mentors, Asst. Governors, and District Leadership at our annual Foundation Mentor Training. The Mentors were asked to promote this new level of recognition during their Foundation Presentations in August and September. The Asst. Governors were asked to do the same during their Club Assemblies. The Mentors and Asst. Governors also promoted our September annual Foundation Seminar at the world-famous Salk Institute here in La Jolla.

-September 1999: Foundation Seminar; The Paul Harris Society of 5340 was formally introduced to nearly 300 attendees and the 3 x 5 cards were passed out as attendees exited this half-day seminar which is designed to inspirationally present our District's involvement in the various Foundation Programs.

-October, 1999: promotional letter from our DG was sent to each Club President, Club Foundation Chair, and District Leadership to explain this new level of giving to The Rotary Foundation.

-Personally-addressed letter was prepared with our DG's letterhead and signature and mailed to each Charter Member thanking them for their generosity and personally inviting them to a special VIP pre-Foundation Gala Dinner reception in their honor...and an opportunity to shake hands with PRIP Cliff Dochtermann and his wife, Mary Elena.

-November, 1999: Foundation Gala Dinner; nearly 700 attendees were introduced to our new program and a 3x5 card was placed at each place setting.

-District Newsletters and Website: continual advertising of this new level of recognition.

-District Councils: held in 5340 five or six times each year, in the evening, mainly a social function...and continued advertising with the 3x5 cards.

-District Conference 2000; presented Charter Members with their lapel banners and more advertising via the 3x5 cards.

-June 2000: Foundation Mentor Training; educated new crop of Foundation Mentors who did the same marketing as in 1999...along with the Asst. Governors.

-September 2000: Foundation Seminar; more PHS of 5340 presentations and advertising.

-November 2000: Foundation Dinner, culminated our Phase I Marketing Plan with more Charter Member presentations of the lapel banners.

## Phase II

Our Phase II Marketing Plan consists of our keeping the marketing efforts alive and visible to all Rotarians. We don't push this program on anyone but we make sure they are aware of the program should they desire to step up.

The Fall Letter: a personalized letter from our DG to each member of the PHS of 5340 which thanks them for becoming a member or renewing their membership, asks them to renew their membership if they haven't already done so, and invites them to our Special Recognition Reception to precede our annual Foundation Gala Dinner. This letter emphasizes our need to increase Annual Giving in support of our increasing involvement in various Foundation Programs.

The Spring Letter: same as above only each is invited to a Special Recognition Reception at the District Conference.

We've found many donors who historically gave \$1,000 or more to their Alma Maters, favorite charities, etc. now include The Rotary Foundation in their generous giving.

We've also found our ranks of Major Donors have increased substantially as this higher level of annual giving enables them to surpass the \$10,000 level more quickly than when they gave at lower levels.

Manpower: this program needs one dedicated Rotarian, preferable a PDG, to see the marketing plans get implemented over a two to three year period. After several years of sustained marketing, this program tends to take on a life of its own...and gets easier to oversee.

Unfortunately, we experience roughly 40-45% turnover each year. This will happen because some new members are picked up that will never renew. For example, there are various Rotary Lottos out there that a member can win a PHF for a fraction of the \$1,000...or a donor stepped up to donate \$1,000 to the PolioPlus campaign.

In our first year of 1999/2000, we recognized 45 members of the newly-created The Paul Harris Society of 5340. In 2000/01, our membership grew to 110...and has remained somewhat the same since.

## SOME CHALLENGES

Please keep in mind that I relate to you what my personal experiences have been and may not be indicative of what you will experience in your District.

- I. ) How to find out who qualifies for membership each year... and their contact data?  
Sounds easy, doesn't it?
- a.) RI can't give me a printout of those donors who gave \$1,000 or more in each Rotary fiscal year...believe me...I keep asking.
  - b.) You can ask each of your Club Foundation Chairs for this information. But first, you have to have an accurate listing of Club Foundation Chairs' contact data. After you send your request for possible members, you'll find all kinds of confusing data forthcoming...if at all from some. No matter how much you explain that you only want the names and contact data of those donors who gave \$1,000 or more this past fiscal year, many will give you the names, etc. of those donors who recently qualified to become a Paul Harris Fellow...culminating years of giving.
  - c.) Club Foundations: this one blind-sided me! Some donors would tell me at District events that they donated their \$1,000 to become a member of the PHS of 5340. Later, when I tried to verify their membership status, I found they wrote their check to their Club and the money was either still sitting there or awaiting a Matching Grant number to be assigned, etc. or diverted to the Club Foundation...in which case this \$1,000 may never get to TRF. This is why I ask all donations be made payable to TRF...period! By the way, I originally included in PHS membership those who donated \$1,000 in a single year...whether the money went to TRF or their Club Foundation. After years of experience with this program, I now only count that money which reaches TRF.
  - d.) Club Contribution Reports: Thank God these reports are now accessible via the new Business Portal. Several times a year, I personally peruse over 600 pages to ascertain who might qualify as a member. But! Reviewing every donor is not foolproof! For example, someone who gave \$1,000 to TRF in November and \$100 the following February will only have the \$100 show up in the Last Contribution column. After a couple times through the Club Contributions Reports for your District, you'll become more adept at identifying those who qualify as a member. You may have to "borrow" the DGs access code to reach the Club Contribution Reports and individual member contact data. To me, this is the most accurate method of gathering the needed information...at this time.
  - e.) Lapel Banners: I designed the banner to be distinctive and eye-appealing and easy to use with existing Rotary pins...especially Foundation pins. If a member loses their lapel banner, I just give them a new one. With a minimum 100 piece purchase, you can get these lapel banners for roughly \$2.50 each from Russell-Hampton, Item# PHSLB (Paul Harris Society Lapel Banner), ph 913-599-4474/fax 913-599-3353. I hear these lapel banners are now also available through Lindeberg Company.

- f.) 3 x 5 Cards: one of our best marketing aids...easy to pass out and fits nicely in a shirt pocket or purse...to read again later. Enclosed is an example of the one I have printed locally. Our District has paid the set-up charges so you can order yours through Tetra Especial Mkt.Inc, ph 619-656-5020; fax 619-656-5024; email [info@tetraespecial.com](mailto:info@tetraespecial.com) or have them printed locally. I usually order 2,000 at a time for about \$250.
- g.) Pledges vs Cash money??? I'm not a big believe in pledges because I think they create too many problems. Who will keep track of all this? Do you send the Rotary Police after the lapel banner if they don't pay up? We don't give PHS recognition to anyone until the money is recorded by TRF...keep it simple!
- h.) Annual Giving plus Restricted Giving qualifies for membership. Some of our District Leadership wanted to have this program apply only to donors of \$1,000 or more each fiscal year to Annual Giving. Our District enjoys over \$200,000 yearly in Restricted Giving, so how could we possibly not include these fine supporters of our Foundation Programs such as PolioPlus, Matching Grants, etc...and these donors also give to Annual Giving.