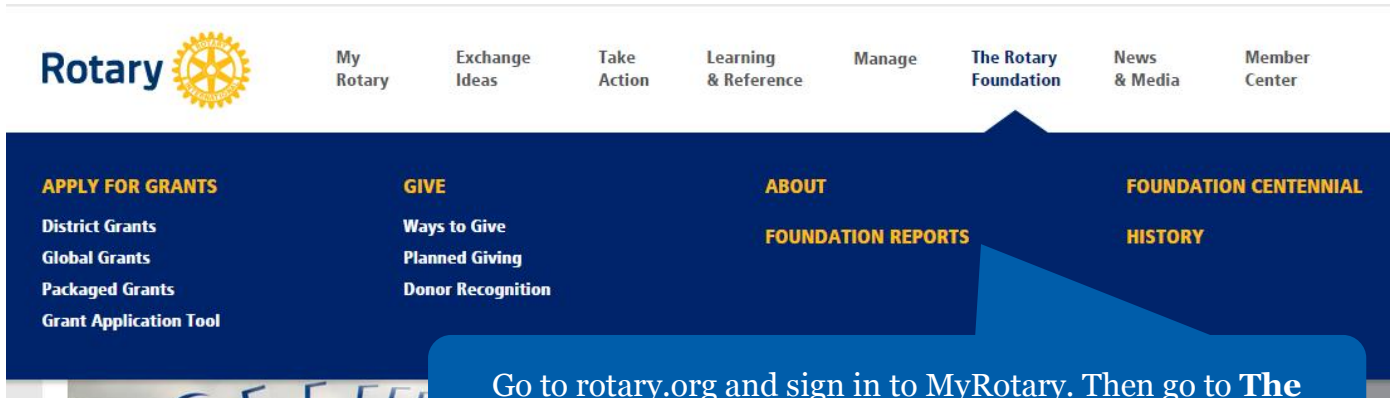


USING THE PAUL HARRIS SOCIETY REPORT



All district and club leaders have access to the Paul Harris Society Report through My Rotary:



Go to rotary.org and sign in to MyRotary. Then go to **The Rotary Foundation**, then **Foundation Reports**.



If you are a club leader, under **Club Reports** find **Contributions & Recognition**, find **Club Giving**, and chose **View Reports**.

If you are a district leader, under **District Reports** find **Contributions & Recognition**, find **Club Giving**, and chose **View Reports**.

Under **Club Reports**, choose **Paul Harris Society Report**

Tab 1: Paul Harris Society



Paul Harris Society (PHS) Report As of 1 July 2014 For District 6540

Zone 28

District 6540

Total PHS Members For District 6540: 44

Club Name	Rotary ID	Name	PHS Member	Rotary Direct	PHS Eligible 2013 - 2014	PHS Eligible 2012 - 2013	PHS Eligible 2011 - 2012	PHS Eligible 2010 - 2011
Timbuktu, IL	123457	Harris, Paul	Y	Y	1-Jul-2013	1-Jul-2012	1-Jul-2011	1-Jul-2010
Narnia, IL	7654321	Klumph, Arch	Y			30-Jun-2013	1-Jun-2012	
Acme, IL	8765309	Salk, Jonas					15-Sep-2012	22-Jun-2011
Buddy, IL	1357911	Scooter, Jerry	Y					

2

3

4

5

1 – The number of society members in the club, district, or zone – that is, the number of donors who have expressed their intent to join the Paul Harris Society

2 – Basic information for each donor, including Rotary ID and club name

3 – A Y indicates that the person is registered as a Paul Harris Society member

4 – A Y indicates that the donor makes recurring contributions through Rotary Direct. This does not automatically make the donor a society member, even if the recurring gifts total \$1,000 per year. Donors must register for society membership.

5 – The **PHS Eligible** columns give the date when the donor reached \$1,000 in contributions for the indicated Rotary year. Consider using the information in these columns to:

- Thank any donors who have contributed at least \$1,000 this Rotary year
- Remind society members who have not yet reached \$1,000 in giving this Rotary year
- Identify donors who are already giving \$1,000 or more yearly and consider inviting them to join the Paul Harris Society

Contacting Members and Identifying New Members

At the bottom of the report, you will see a tab labeled **PHS Member Detail**. It's similar to the Paul Harris Society tab but includes a PHS Join Date column to allow you to identify new members.

To identify new members:

1. Export the data to an Excel file as shown here:

2. Open the Excel spreadsheet. If asked, use the **Enable Editing** button to proceed.
3. With the Home tab active, click or tap **Sort & Filter**; choose **Filter** from the drop-down menu to make sorting buttons appear at the tops of the columns, as shown below.
4. Use the drop-down button in the **PHS Join Date** column.
5. In the **Search** box:
 - a. Type a three-letter month abbreviation to search for members who joined during that month, or
 - b. Type a year to find members who joined that year
6. Choose **OK**.

1	Zone	Sect	Distr	Club No	Club Name	Club Member	Rotary ID	Name	PHS Memb	PHS Join Date	Rotary Dire	PHS Eligible 2014 - 201	PHS Eligible 2013 - 201	PHS Eligible 2012 - 201	PHS Eligible 2011 -
2	99	99	99999	999999	Amityville, NY	N	1234567	Harris, Paul	Y	1-Jul-2013	Y				
3	99	99	99999	999999	Amityville, NY	Y	7654321	Klumph, Arch	Y	23-Aug-2014	Y				30-Jan
4	99	99	99999	999999	Babylon, NY	Y	12374567	Salk, Jonas							26-Mar
5	99	99	99999	999999	Brentwood, NY	N	987654321	Scooter, Jerry	Y	15-Sep-2013	Y				
6															
7															

Paul Harris Society coordinators are encouraged to familiarize themselves with this report, check it periodically to welcome new members, and make sure each new member is presented a Paul Harris Society chevron at an appropriate occasion. This tab of the report also lists each donor's club number and contact information. You can use the information to perform email and mail merges to send thank-you letters, email reminders, invitations to recognition events, and so on.