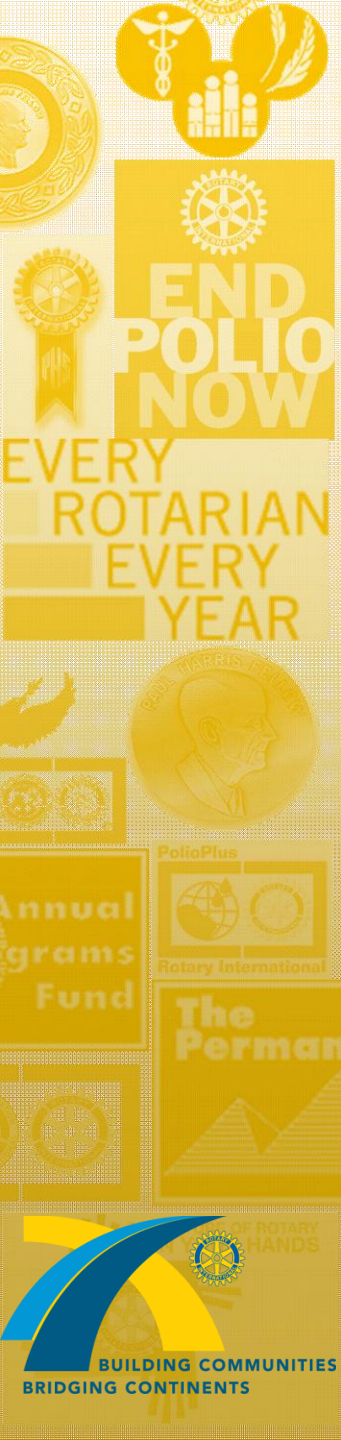


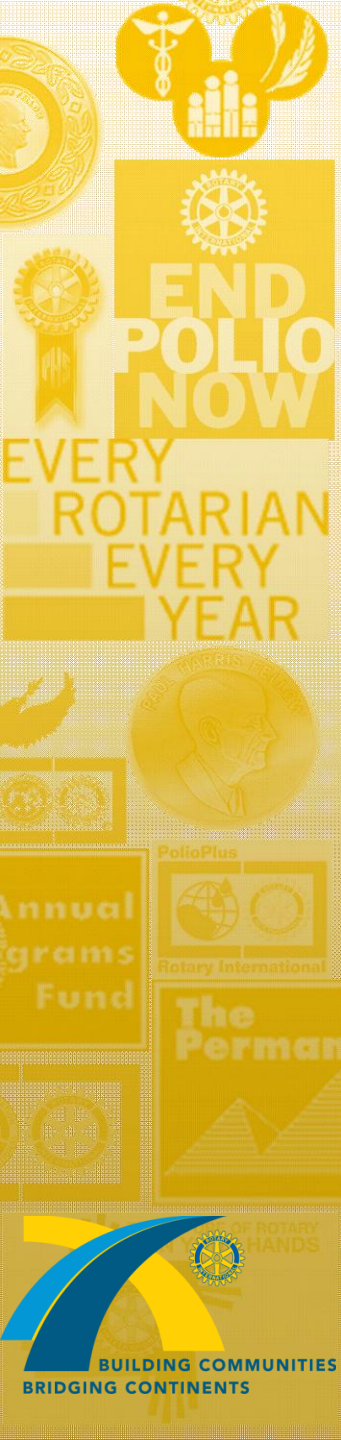
ACHIEVING A SUCCESSFUL ROTARY FOUNDATION ANNUAL GIVING CAMPAIGN FOR 2010-2011

Scott Mills
Annual Giving Chair
Rotary District 7610

Tools and Skills You Need

- Resources
- Commitment
- Organization
- Knowledge
- Leadership by Example
- Timing
- Motivation
- Team Work
- Educated and Motivated Donors
- Sincere Appreciation





Resources

- Through Member Access portal:
 - Club Recognition Summary
 - Monthly Contribution Report
 - Every Rotarian Every Year Eligibility Report
 - Multiple Donor Form (094EN)
 - Credit Card Contribution Form-US (808EN)
 - Recognition and Transfer Request Form (102EN)
 - TRF-DIRECT Donations Brochure (998EN)
- Reports and Forms on Rotary.org
 - Global Contribution Form (123EN)
- From District
 - Paul Harris Society commitment form



Club Recognition Summary

The Rotary Foundation - Club Recognition Summary
 as of Date, Month Year
 Rotary Club, USA

Page: 1

District: 1234	Paul Harris Fellows: 102	Rotarian Donors: 41	
Club: 1234	Benefactors: 3	Rotarian Non-Donors: 25	All Time Giving: \$138,680.50
		Non Rotarian Donors: 263	

Account No.	N A M E	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts	----- LAST Date	CONTRIBUTION Designation
1234	R/C of Rotary Club					19,425.50		
* 5089984	America, Jose	N	\$1,000.00	PHF	Jun-1988		Jun-1988	PolioPlus
5089986	Anderson, William	N	\$1,000.00	PHF	Jun-2007		Jun-2007	
666942	April, Jennifer	Y	\$2,300.00	PHF+1	Jan-1989	1,300.00	Mar-2008	APF-Share
5446789	+ Bender, Doris	Y	\$240.00				Mar-2008	APF-Share
6041820	Bredberg, Raymond	N	\$1,000.00	PHF	Dec-2003			
5516652	Cameron, Casey C.	Y	\$200.00				Mar-2008	APF-Share
* 666933	Castillo, Aja	N	\$2,000.00	PHF+1	Jun-1986		Apr-1991	APF-Share
4369642	Chang, Dae Jong	Y	\$1,400.00	PHF	Oct-2004	400.00	Jun-2007	APF-Share
948411	Chapman, Cynthia	Y	\$9,000.00	+ PHF+8	Apr-1993	14,500.00	Jan-2008	PolioPlus
6018861	Colander, Jonathan	Y						
666975	Domínguez, Vero	N	\$1,400.00	PHF	Jun-1983		Jun-2005	PolioPlus
666966	Dowling, Monroe D.	Y	\$7,320.00	PHF+6	Jan-1982		Oct-2002	Matching Grants Program
4369637	Eil, Gregory	N	\$1,100.00	PHF	Feb-1988		May-2004	APF-Share
990179	+ Fabiola, Viola S.	Y	\$3,120.00	PHF+2	Feb-2008	820.00	Feb-2008	APF-Share
6099234	Fiola, Sarah S.	Y						
1070746	Friedman, Adam	Y	\$1,100.00	PHF	Jan-1989	100.00	Jun-2007	APF-Share





Monthly Contribution Report

Rotary Foundation
Monthly Contribution Report
 1-Jul-2005 to 30-Jun-2006

(In US Dollars)

Club No	Club Name	No. of Members	APF Goal Amount	APF Goal % Achieved	APF Per Cap	---Annual Giving---		---Restricted Giving---		---Permanent Fund---		---Total---	Annual Giving Per Capita Rank
						Month	Period	Month	Period	Month	Period		
District: 1234													
1234	District 1234 Contribution	0	\$0.00	0%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
101	Arbor Hills (Sunset), CA, USA	9	\$1,200.00	108%	\$144.44	\$0.00	\$1,300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,300.00	
102	Beach, CA, USA	41	\$7,200.00	55%	\$96.34	\$0.00	\$3,950.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,950.00	
103	Berry Fields Valley, CA, USA	27	\$6,200.00	91%	\$208.89	\$2,645.00	\$5,640.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$55,640.00	
104	Big Bear Meadow Sunrise, CA, USA	22	\$2,100.00	141%	\$134.77	\$556.00	\$2,965.00	\$0.00	\$1,250.00	\$0.00	\$0.00	\$4,215.00	
105	Big Bear Meadow, CA, USA	79	\$7,400.00	83%	\$77.34	\$2,100.00	\$6,110.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$7,110.00	





EREY Report

The Rotary Foundation - EREY Eligibility Report
as of Date, Month Year
Rotary Club, USA

District: 1234 EREY Member Donors: 24 RFSM Member Donors: 3 PHS Eligible Donors: 1
Club: 1234 Non-EREY Members: 8 Non-RFSM Members: 29

Account No.	N A M E	Club Member	EREY Date Achieved Current Year	EREY Date Achieved Previous Year	Sustaining Member Date Achieved Current Year	Sustaining Member Date Achieved Previous Year	PHS Eligible Date Achieved Current Year	PHS Eligible Date Achieved Previous Year
1234	R/C of Rotary Club							
* 5089984	America, Jose	N						
5089986	Anderson, William	N		01-Apr-2007				
666942	April, Jennifer	Y	01-Jul-2007	01-Jul-2006	01-Jul-2007	01-Jul-2006		
5446789	+ Bender, Doris	Y		23-Feb-2007		01-Apr-2007		
6041820	Bredberg, Raymond	N		04-Aug-2006		04-Aug-2006		
5516652	Cameron, Casey C.	Y	01-Jul-2007	08-Oct-2006	23-Feb-2008	23-Feb-2007		
* 666933	Castillo, Aja	N						
4369642	Chang, Dae Jong	Y		08-Oct-2006		08-Oct-2006		08-Oct-2006
948411	Chapman, Cynthia	Y	31-Dec-2007	31-Dec-2006		31-Dec-2006		
6018861	Colander, Jonathan	Y						
666975	Dominguez, Vero	N		31-Dec-2006		31-Dec-2006		
666966	Dowling, Monroe D.	Y	15-Mar-2008	24-May-2007				
4369637	Eil, Gregory	N						
990179	+ Fabiola, Viola S.	Y		31-Dec-2006		24-May-2007		
6099234	Fiola, Sarah S.	Y	31-Dec-2007	15-Jul-2006				
1070746	Friedman, Adam	Y		31-Dec-2006		31-Dec-2006		
662048	+ Gallas, Edward	Y		30-Jun-2007		30-Jun-2007		
* 666977	Gordon, Andrea	N						
1467589	Gregoria, Alexander	N						
6182943	Karena, Matthew	Y		01-Apr-2007				
1199589	Kean, Richard	Y						
666963	King, Brian	Y		15-Jul-2006		14-Apr-2007		
4402261	Klimes, Sarah	N						
666934	Kowitz, Nicholas	Y	15-Dec-2007	24-May-2007	15-Dec-2007	24-May-2007	15-Dec-2007	
* 850201	Mitchell, Frank	N						

“Give me a show of hands of every Rotarian who supports the humanitarian and educational programs of The Rotary Foundation and wants to ensure those programs have the financial resources to support our own club’s service projects.”

Establish Club’s Goals

An Effective Goal Is:

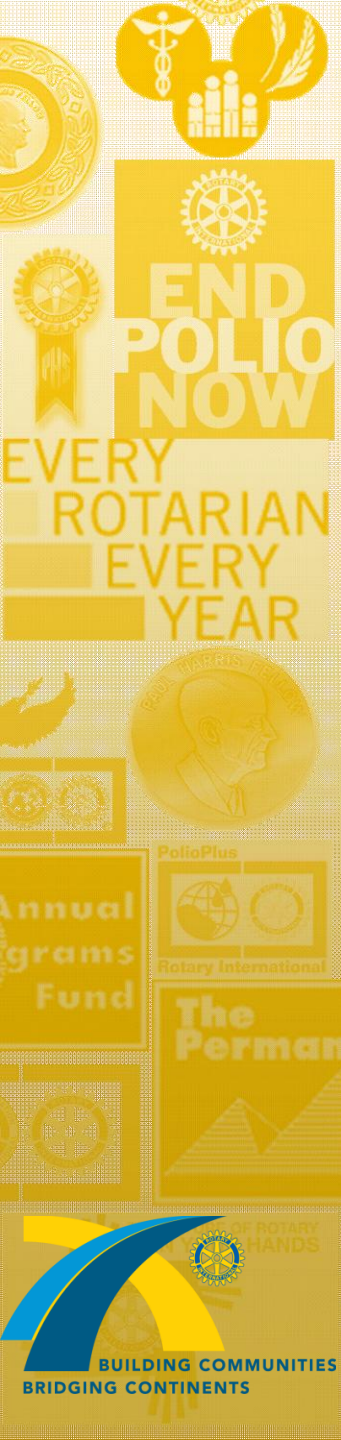
- Specific (and SHARED)
- Measurable
- Attainable
- Realistic
- Timely

Obtain Club’s Buy-in

- Communicate goals
- Obtain board support
- Build momentum
- Recruit “spin doctors” who support plan and goals
- Get early buy-in from trusted donors
- Hold club assembly

District 7610 APF Goals

- \$225.81 *per capita*, which is:
 - \$.05 more per day than members gave in 2009-2010
 - a *per capita* increase of only \$18.45, which is the average *per capita* increase over the last six years
- \$499,265.91 to Annual Programs Fund



Sample Text for Post Card

Dear [FName]:

The mission of The Rotary Foundation is to do good in the world. The Rotary Foundation provides much of the financial support for many of the humanitarian, vocational, and educational programs of our club.

Please help our Rotary Club better serve our community and the world by helping us meet this year's goals for giving to The Rotary Foundation's Annual Programs Fund:

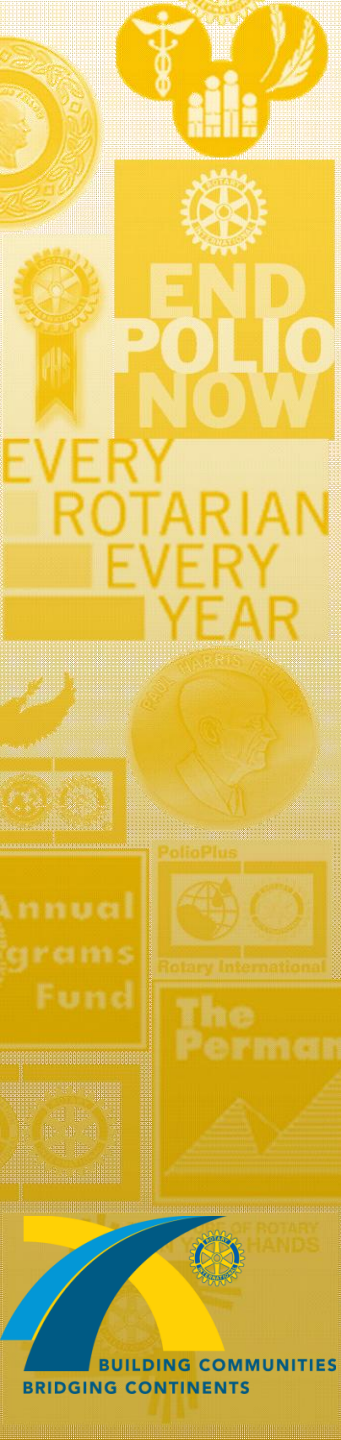
- ✓ 100% Paul Harris Fellow Club—we're only 8 away from that goal!
- ✓ 100% Sustaining Member Club—last year we were only 5 short of every member giving at least \$100. This year we'll meet that goal!
- ✓ Four new Paul Harris Society members who pledge to give \$1,000 or more each year they are financially able.
- ✓ *Per capita* giving of \$345 and an annual giving goal of \$18,250—which is only \$.05 per day more than we gave last year.

Help our Rotary Club meet these challenge goals for 2010-2011.

Yours in Rotary Service

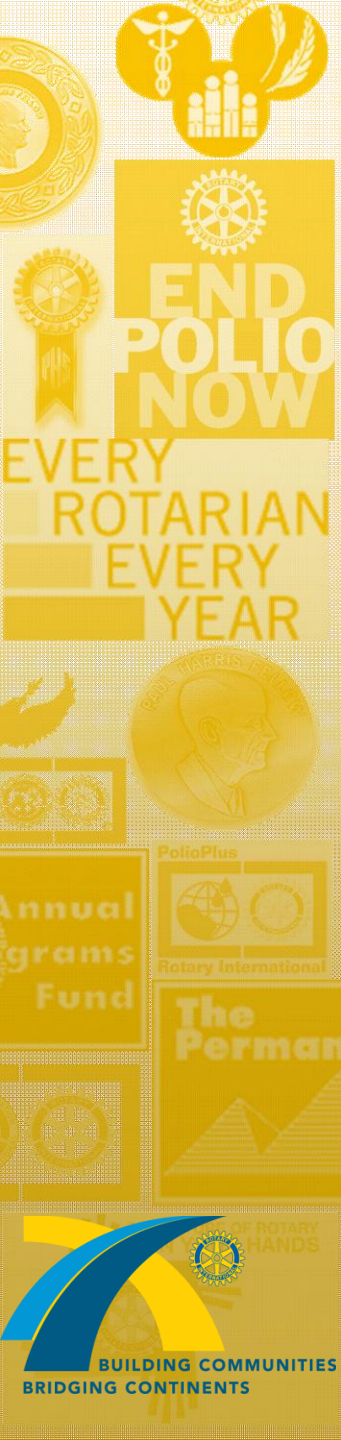
Casey Spencer

Club President



Make it Easy to Give

- Offer to complete the donor form
- Encourage use of TRF-DIRECT
- Contribute via club dues invoice



Sample TRF Dues Election Form

___ Yes, I want to support the programs of The Rotary Foundation and its support of the service projects of my Rotary club. Please include on my quarterly club dues invoice a Rotary Foundation donation in the amount of:

___ \$25 (to be a Sustaining Member). Please add an additional \$25 to my second quarter dues to ensure that I'm a Sustaining Member this year.

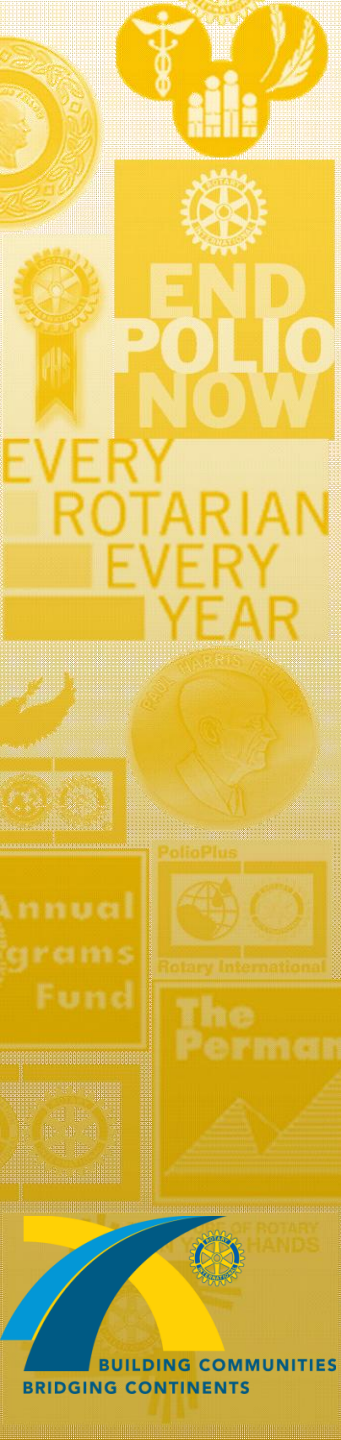
___ \$56 to ensure we meet our club's *per capita* giving goal.

___ \$125 (matched with club Foundation Recognition Points to become a new or multiple Paul Harris Fellow)

___ \$250 (to become a Paul Harris Society Member. Please forward to me a PHS pledge form.)

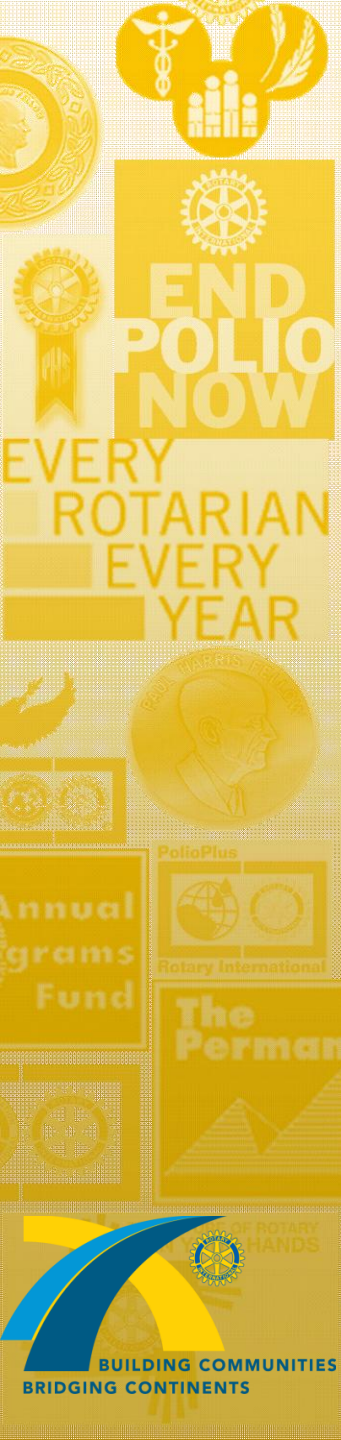
___ I will make my contribution through TRF-Direct on my credit card or by electronic transfer from my bank account. Please forward to me a TRF-Direct enrollment form.

Please return this form to Bob King, Rotary Foundation club chair.



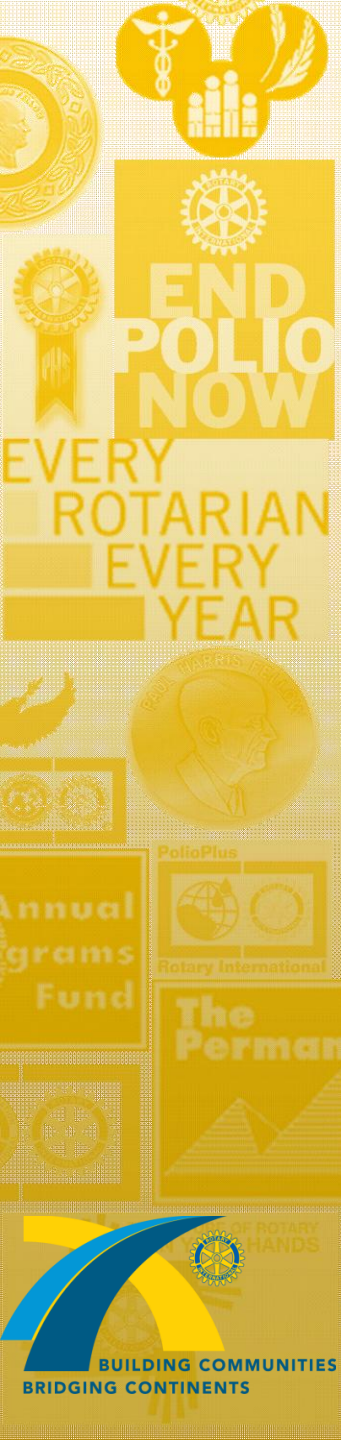
Foundation Education

- Give Rotary Foundation Weekly Thought
- Schedule TRF-related speakers and programs
- Hold TRF training session within your club
- Include TRF deadlines on your club calendar
- Attend District Training
- Public Relations for TRF-supported club projects
- Small group sessions
- TRF Newsletters
- District Foundation Newsletter



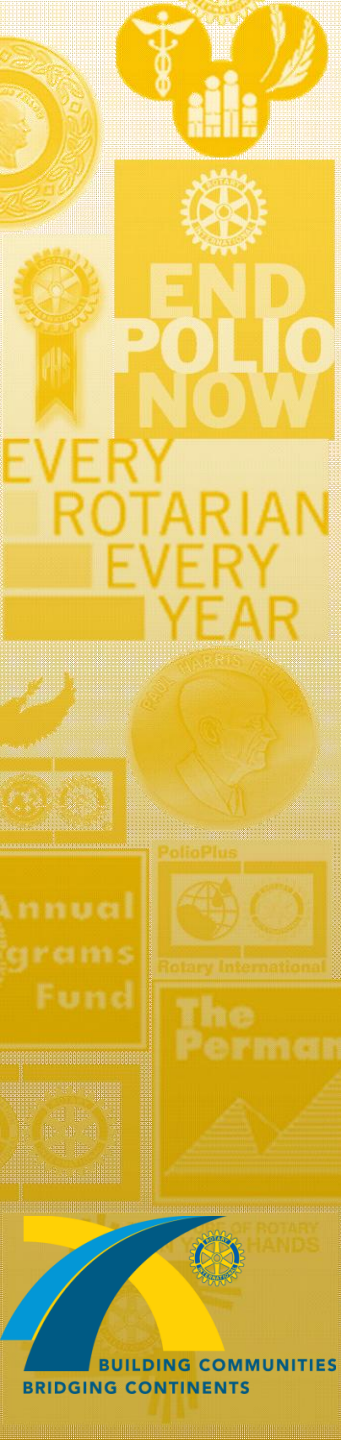
When to Ask

- Avoid Cherry Picking
- Order of solicitations
 - Top Tier (start before December 1)
 - Major Gifts
 - Major Donors
 - Paul Harris Society
 - Second Tier (complete before June 1)
 - Sustaining Members
 - EREY



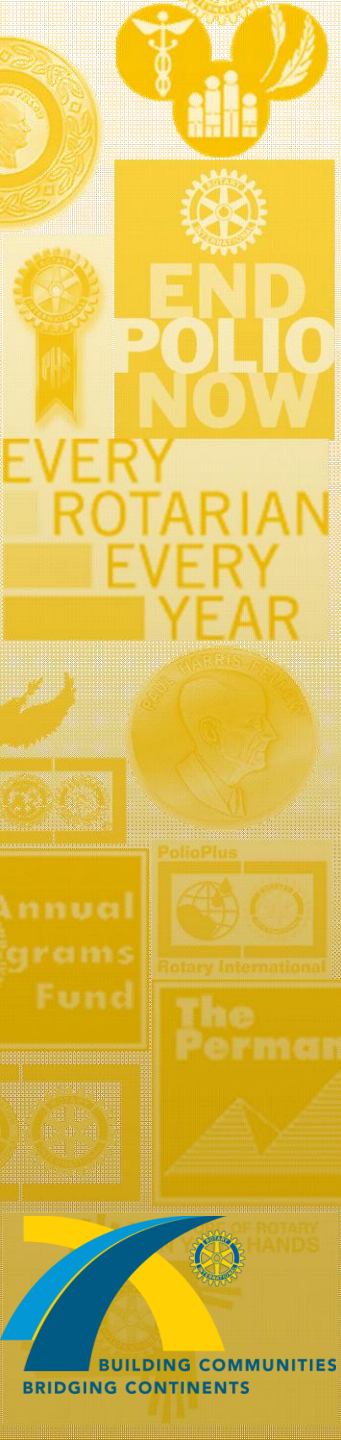
Transmitting Donations

- Offer to send it to TRF
- Postmark by June 30 & arrive by July 7
- Postmark by December 31 & arrive by January 7
- Send overnight (to arrive by June 30) or Express Mail, delivery confirmation
- Encouraged online or fax donations using credit card if close to deadline



Organization & Record Keeping

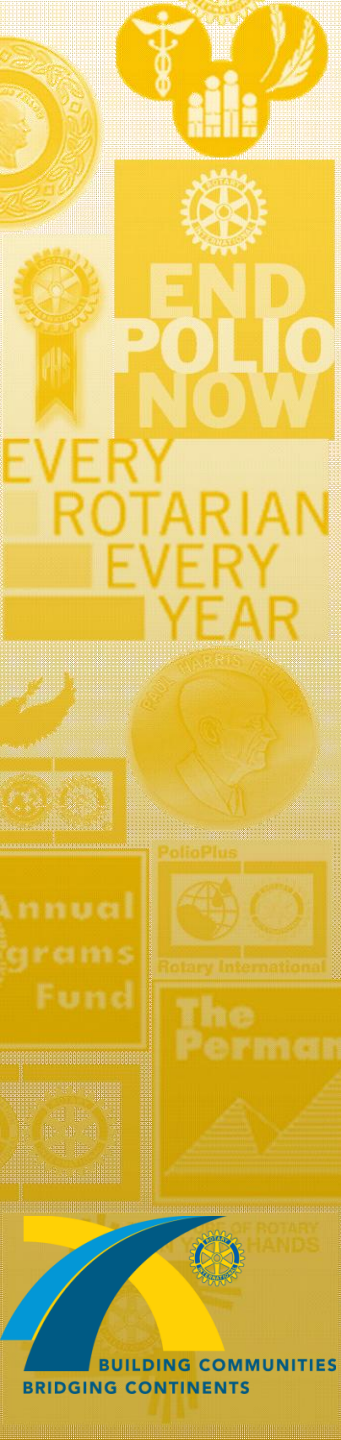
- Contact Center: 866-9ROTARY
- Member Access
- Create and maintain an Excel spreadsheet
- Keep a copy of EVERYTHING you send to TRF
- Maintain an electronic file of forms that are readily available



Soliciting Large Donations

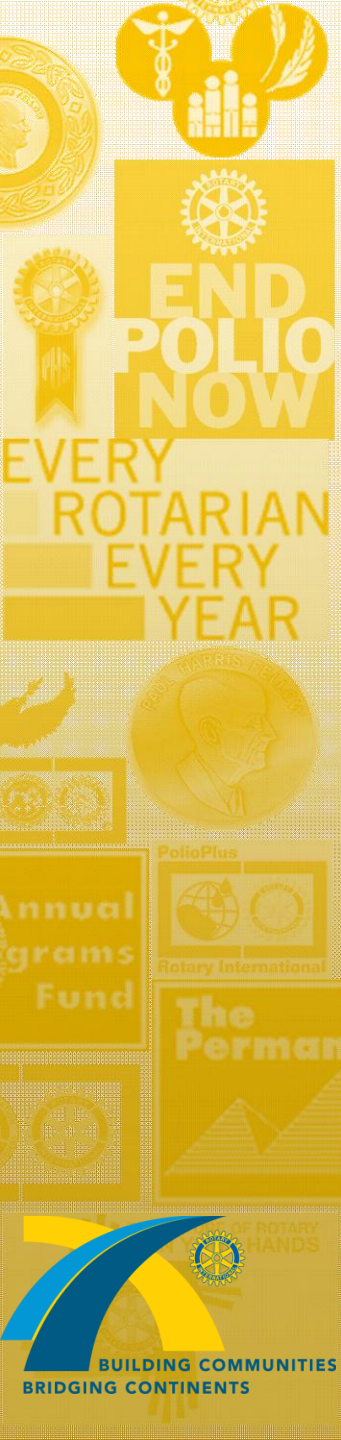
- Identify
- Engage
- Cultivate
- Solicit
- Stewardship

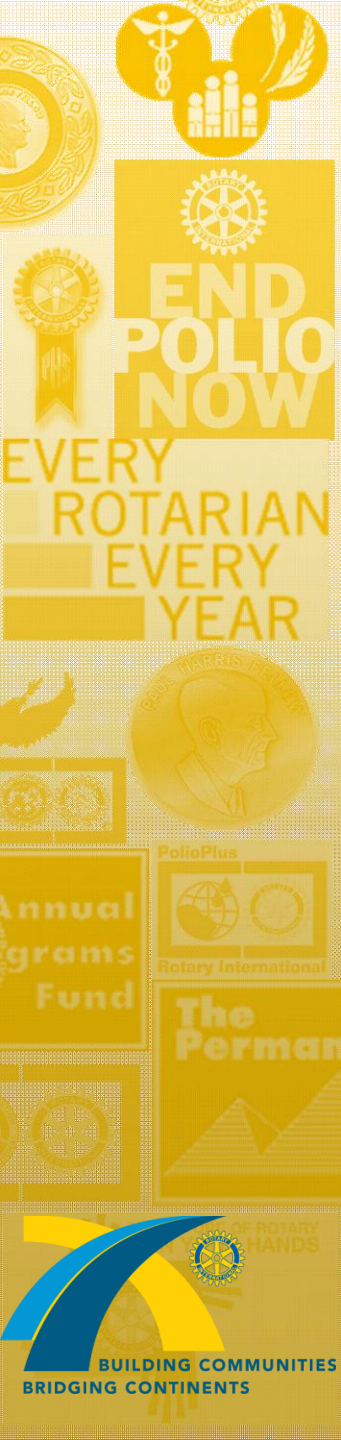
REMEMBER: Help is available within your Area, District, Region/Zone, and from TRF in Evanston



Recognition and Appreciation

- Good stewardship requires a thank you, and it is the first step towards the request of the next donation
- Order recognitions and make their presentations meaningful
- Recognize donors and involve other donors in the presentation of recognition of new donors who are receiving the same recognition





Questions and Answers