


Using the Club Goal Form



THE ROTARY FOUNDATION
FUND DEVELOPMENT
CLUB GOAL REPORT FORM

(Please return completed form to your district governor-elect by 1 May)

EN—(707)
**EVERY
ROTARIAN
EVERY
YEAR**

Club Name (please print) _____ Club Number _____
Country _____ District _____
Club President's Name (please print) _____
Club President's Signature _____
Telephone _____ Fax _____ E-mail _____

ANNUAL PROGRAMS FUND GOAL

Your Annual Programs Fund contributions support humanitarian, educational, and cultural programs both locally and internationally. Personal outright contributions, club fundraisers, and other sources are encouraged to achieve club goals. Calculate your club's Annual Programs Fund goal by multiplying the number of members in your club by a per capita figure appropriate to your club.

OF CLUB MEMBERS: _____

AVERAGE AMOUNT PER MEMBER: US\$ _____ **A**

APF-SHARE GOAL: US\$ _____ **B**
(Club members x per capita goal)

PERMANENT FUND & MAJOR GIFTS GOALS

Indicate the number of club members interested in making an outright gift of US\$10,000 or more and those interested in including the Permanent Fund in their estate plan.

Number of new Major Gifts: _____ **C**
(US\$10,000 or more outright)

Number of new Benefactors: _____ **D**
(Minimum US\$1,000 outright gift or commitment in estate plan)

Number of new Bequest Society Members: _____ **E**
(Minimum US\$10,000 commitment in estate plan)

The Rotary Foundation of Rotary International (FN500)
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Phone: 847-866-3352; Fax: 847-328-5260; E-mail: grey@rotary.org
www.rotary.org

White Copy – district governor-elect sends to TRFPink Copy – district governor-electYellow Copy and instructions – Rotary club

- A.** The recommended average amount per Member internationally is US\$100. Several districts have chosen to promote a double-sustainer minimum contribution of US\$200 instead.
- B.** Contact your district leadership team to review a list of prior year goals and total contributions to help determine an appropriate stretch goal for your Rotary Club.
- C.** Consider current Benefactors, Bequest Society members, PHF+7 awardees and Paul Harris Society members to determine a potential goal for Major Gift donors in your club.
- D.** Use the Benefactor Commitment Card (Form 149, available for download at www.rotary.org) to promote and sign-up your members to become Benefactors of The Rotary Foundation.
- E.** Consider current Major Donors, Paul Harris Society members and Benefactors to determine a potential goal for new Bequest Society members in your club.



Using the Club Goal Form

Annual Programs Fund Goal

The Club Goal Form is an important fundraising tool to establish real and achievable goals for each club and, in turn, each district. Submitting meaningful club goals in a timely manner is crucial to overall district planning and fundraising efforts.

In accordance with the Every Rotarian, Every Year initiative (EREY), The Rotary Foundation recommends a contribution of at least US\$100 per member worldwide. For many North American clubs to more accurately capture their fundraising potential, consider the following factors when determining an appropriate goal amount:

- Examine your club goal and achievement status by looking at your club's prior year history as a starting point in setting your goal for this year. (Your DRFC can work with TRF staff in obtaining a giving history report, if needed.)
- Establish a new goal that is realistic, but also builds on your previous year total.
- Look at a multi-year giving report for signs of how to stretch your goal.
- Look at your member PHF levels to determine new fund raising potential.
- Consider what impact your Paul Harris Society Members can have on your goal.

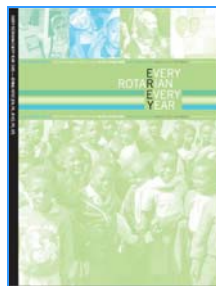
Permanent Fund and Major Gift Goals

Use the resources available at the district level (Permanent Fund Chair, District Rotary Foundation Chair), the Zone Level (Major Gift Advisors, Regional Rotary Foundation Chairs) and at the Rotary Foundation (Major Gifts Officers, Planned Giving Officers and Annual Giving Officers) to help you succeed.

To promote the TRF Permanent Fund, use our brochure **Two Needs, Two Ways of Giving** (173-EN). For additional materials regarding the Bequest Society and Planned Giving, please visit our web page: <http://www.rotary.org/en/Contribute/WaysToGive/PlannedGiving>

TIP: Visit our website to review other ways of giving and individual donor recognition: <http://www.rotary.org/en/Contribute/DonorRecognition/IndividualRecognition>
Many promotional materials can be ordered online and sent to your club at <http://shop.rotary.org>

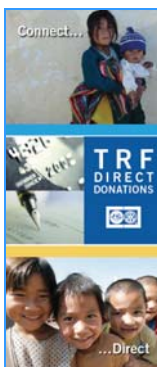
Become knowledgeable with Every Rotarian, Every Year resources available to you



DVD - (978-MU)



EREY Brochure and Contribution Form - (957-EN)



TRF-DIRECT Contribution Form - (998-EN)



Weekly Foundation Thoughts (search words: "foundation thoughts")

Also available:

- Sustaining Member badge stickers
- EREY Posters
- Quarterly EREY email newsletter
- Every Rotarian, Every Year success booklet
- and many more are available at: <http://shop.rotary.org>

