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扶輪基金會新的義工與募款團隊

三種資深義工領導人的架構：

地域扶輪基金協調人(RRFC)、
年度計劃基金策略顧問(SA)、
巨額捐獻顧問(MGA)



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國際扶輪第 3520 地區前總監邵偉靈 PDG DENS 翻譯

在2001-02年度，扶輪基金會為美國和加拿大的所有地帶與地區，制定了經核准之三種資深義工領導人的架構：**地域扶輪基金協調人(RRFC)**、**年度計劃基金策略顧問(SA)**和**巨額捐獻顧問(MGA)**。這些由地域扶輪基金協調人來加以訓練和領導的團隊，其首要責任是於其各自的地帶中為扶輪基金會的基金發展成功。



In 2001-02, The Rotary Foundation established the approved structure of three senior volunteer leaders: Regional Rotary Foundation Coordinator (RRFC), Annual Program Fund Strategic Advisor (SA) and Major Gift Advisor (MGA) for all zones and districts in the United States and Canada. These teams, trained and lead by the RRFC's, have primary responsibility for The Rotary Foundation's Fund Development success in their respective zones.

現在扶輪基金會希望於2005-06年度擴展這個架構至所有的地帶和地區。這些職務初始是以任命任期一年，將會重新邀請添加兩年的任期。至於，地域扶輪基金協調人將是其地帶之扶輪基金會義工與募款人，並於下一年度有職責去訓練與領導該團隊。這些提名人選則是由扶輪基金保管委員會主委當選人來加以任命的。

TRF now hope to expand this structure to all zones and districts for 2005-06. The initial appointment will be for one year subject to renewal for two additional years. As the lead Rotary Foundation volunteer and fundraiser in your zone, RRFC will have the responsibility of training and leading this team next year. Nominations are also being appointments are made by Trustee Chairman-elect.

至於，**年度計劃基金策略顧問(SA)**和**巨額捐獻顧問(MGA)**之職責如下頁：

年度計劃基金策略顧問 權限

ANNUAL PROGRAMS FUND STRATEGIC ADVISORS TERMS OF REFERENCE

年度計劃基金策略顧問有職責於其所分派地區內從事「每位扶輪社員，每年」訊息之推廣與對年度計劃基金捐獻募款。扶輪基金會年度計劃基金策略顧問(APFSA) 提供地域扶輪基金協調人(RRFCS)、扶輪基金職員和地區的領導(地區總監、地區總監當選人、助理總監、地區扶輪基金委員會主委、年度計劃基金小組委員會主委)之間的一種聯繫的功能，以促進年度計劃捐獻「每位扶輪社員，每年」訊息之推廣並協助扶輪社與地區訂定並達成其年度計劃基金目標為目的。年度計劃基金策略顧問是由扶輪基金保管委員會主委指派一年任期，續任至多兩年。於北美之每八到十個地區將至少指派的一位年度計劃基金策略顧問。

The Annual Programs Fund Strategic Advisor is responsible for the promotion of the Every Rotarian, Every Year message and the raising of contributions to the Annual Programs Fund in their assigned districts.

The Rotary Foundation Annual Programs Fund Strategic Advisors (APFSA) provide a link between Regional Rotary Foundation Coordinators, Rotary Foundation staff, and district Leadership (District Governors, District Governors-elect, Assistant District Governors, District Rotary Foundation Chairs, Annual Giving Subcommittee Chairs) within their designated territories with the purpose of promoting the annual giving Every Rotarian, Every Year message and assisting clubs and districts in setting and achieving their Annual Programs Fund goals. Annual Programs Fund Strategic Advisors are appointed by the Trustee Chair for a one-year term, renewable up to a maximum of three years. There shall be at least one Annual Programs Fund Strategic Advisor appointed for every eight to ten districts in North America.

Under the leadership of the RRFCS, the Annual Programs Fund Strategic Advisors shall:

於地域扶輪基金協調人領導之下，年度計劃基金策略顧問應：

1. 以身作則以每年美金 100 元或更多捐獻至年度計劃基金；
2. 需要的話，於地帶研習會、社長當選人研習會、扶輪基金研習會、地區年會、地區講習會以及其他扶輪訓練與活動，推廣「每位扶輪社員，每年」訊息；
3. 於所委派之區域內監督每月募款進度並提供扶輪社與地區克服達成目標障礙之支援與策略；
4. 與地區領導人持續進行於：
 - a. 為全世界每人每年美金 100 元年度計劃基金的目標，於扶輪社與地區會議推廣年度捐獻「每位扶輪社員，每年」訊息；
 - b. 協助扶輪社與地區訂定適當之年度計劃基金目標，而將這些目標提給扶輪基金會職員，並提供有助於目標達成的策略。
 - c. 協助扶輪社與地區發展並維持堅強之募款委員會以建立並完成目標。
 - d. 每個地區至少找尋一位巨額捐獻人之挑戰捐贈；
 - e. 引起對有關扶輪基金贊助會員與扶輪基金會直接捐獻計劃的瞭解；
 - f. 確保地區內沒有不捐獻的扶輪社；
 - g. 鼓勵所有扶輪社 100% 參與扶輪基金會計劃。
5. 與巨額捐獻國家顧問一起合作，為了挑戰去培養與懇邀巨額捐獻人與美金 50,000 元以下之年度計劃基金巨額捐獻。
6. 填妥所分配之一季一次優先任務表。

1. Lead by example and contribute US\$100 or more each year to the Annual Programs Fund;
2. Promote the Every Rotarian, Every Year Annual Programs Fund message at Zone Institutes, PETS, Foundation Seminars, District Conferences, District Assemblies, and other Rotary Trainings and events as requested;
3. Monitor monthly fundraising progress in assigned territories and provide support and strategies to clubs and districts in overcoming obstacles to goal achievement;
4. Works with district leadership on an ongoing basis to:
 - a. Promote the annual giving Every Rotarian, Every Year message at club and district meetings toward the US\$100 per capita worldwide Annual Programs Fund Goal;
 - b. Assist clubs and districts in setting appropriate Annual Programs Fund goals, submitting those goals to Foundation staff, and provide strategies toward goal achievement;
 - c. Assist clubs and districts to develop and maintain strong fundraising committees to establish and meet goals;
 - d. Seek a minimum of one major donor Challenge gift per district;
 - e. Create awareness about the Rotary Foundation Sustaining Member and TRF-DIRECT Donations programs;
 - f. Ensure that there are no non-contributing clubs in the district;
 - g. Encourage 100% participation by all clubs in Foundation programs.
5. Works in tandem with the Major Gifts National Advisor to cultivate and solicit major donors for Challenge and Major Gifts under US\$50,000 for the Annual Programs Fund.
6. Completes the quarterly priority task list as assigned.

巨額捐獻顧問

2005-2008 年度職責

巨額捐獻顧問職責是於其所委派的地區內促進並籌募巨額捐獻至扶輪基金會。

巨額捐獻顧問於其所委派的區域內提供地域扶輪基金協調人(RRFCs)、扶輪基金職員和地區的領導(地區總監、助理總監、地區扶輪基金委員會主委、地區永久基金委員會主委)之間的一種聯繫的功能，以促進巨額捐獻的籌募為目的。巨額捐獻顧問是由扶輪基金保管委員會主委指派一年任期，續任至多兩年。每八到十個地區將至少指派的一位國家顧問。

於地域扶輪基金協調人領導之下，巨額捐獻顧問應：

1. 根據自身財政能力對扶輪基金會，藉由巨額捐獻及/或遺贈會及/或永久基金捐獻人承諾的方式來以身作則；
2. 於所委派之每個地區內持續進行訓練和管理該地區領導人，包括地區永久基金主委、地區總監、地區總監當選人、地區扶輪基金主委和助理總監，去對有關巨額捐獻與永久基金捐獻人承諾方面的努力，包括：
 - a. 有希望成為巨額捐獻人選的找尋、培養、懇請與管理者之職責；
 - b. 保證每一個地區於年度計劃基金方面每年至少一個巨額捐獻；
 - c. 對於增加永久基金捐獻人與遺贈會的參與和推廣訂定目標；
 - d. 籌劃培養與管理者之職責方面的活動。
3. 管理地區領導人每地區每年培養與懇請至少十二位有希望成為巨額捐獻人選，並以重點強調美金 25,000 元全額捐獻或更多的捐獻(包括對年度計劃基金方面每年至少一個巨額捐獻)；
4. 親自對有希望成為巨額捐獻的人選強調美金 25,000 元全額捐獻或更多的捐獻；
5. 推廣對扶輪基金會之遺贈會及永久基金捐獻人的承諾；
6. 向扶輪基金職員與地域扶輪基金協調人提供定期進度報告；
7. 於地帶研習會、社長當選人研習會、扶輪基金研習會以及其他扶輪訓練與活動內，若需要的話要去協助地域扶輪基金協調人推廣巨額捐獻及遺贈會的承諾。

MAJOR GIFTS ADVISOR

2005-2008 Responsibilities

The Major Gift Advisor is responsible for promoting and raising major gifts to the Foundation in assigned districts.

The Major Gift Advisor provides a link between Regional Rotary Foundation Coordinators (RRFCs), Rotary Foundation staff, and district leadership (District Governors, Assistant District Governors, District Rotary Foundation Chairs, District Permanent Fund Chairs) within their designated territories for purposes of major gift fundraising. Major Gift Advisors are appointed by the Trustee Chair for a one-year term, renewable for a maximum of two years. There shall be at least one National Advisor appointed for every eight to ten districts. Under the leadership of the RRFC, the Major Gift Advisor shall:

1. Lead by personal example through a major gift and/or Bequest Society and/or Benefactor commitment to the Foundation, according to financial capacity;
2. Train and manage district leadership, including the District Permanent Fund Chair, District Governor, District Governor-elect, District Foundation Chair, and Assistant Governors in each assigned district on an ongoing basis on their major gift and Benefactor commitment efforts, including:
 - a. identification, cultivation, solicitation, and stewardship of major gift prospects;
 - b. securing at least one major gift to the Annual Programs Fund per district;
 - c. setting goals for increased Benefactor and Bequest Society participation and promotion;
 - d. planning cultivation and stewardship events.
3. Manage district leaders in the cultivation and solicitation of at least twelve major gift prospects per district per year, with an emphasis on outright gifts of US\$25,000 or greater (including at least one major gift to the Annual Programs Fund);
4. Personally cultivate and solicit major gift prospects with an emphasis on outright gifts of US\$25,000 or greater;
5. Promote Benefactor and Bequest Society commitments to the Foundation;
6. Provide regular progress reports to Foundation staff and RRFCs;
7. Assist RRFC in promoting major gifts and bequest commitments at Zone Institutes, PETS, Foundation Seminars, and other Rotary trainings and events as requested.