

COACH'S NAME

THE COACH'S PLAYBOOK



A play-by-play guide to EREY
fundraising success for your district

EVERY
ROTARIAN
EVERY
YEAR

THE COACH'S PLAYBOOK



A play-by-play guide to EREY
fundraising success for your district





Every DGE's Guide

➔ COACHING YOUR DISTRICT TEAM TO EREY FUNDRAISING SUCCESS

Every coach wants his or her team to succeed. Every team member wants to experience victory. This guide is your playbook for achieving success in **The Rotary Foundation's** (TRF's) **Every Rotarian, Every Year** (EREY) effort.

WHAT SUCCESS WILL MEAN FOR YOUR DISTRICT:

- ➔ More funds available through the District Designated Fund (DDF) — the funding mechanism available to support TRF programs such as Group Study Exchange, Matching Grants, and Ambassadorial Scholarships
- ➔ Greater involvement of Rotarians in district- and club-supported projects, and more enthusiasm for supporting TRF programs
- ➔ More opportunities to support club proposals for District Simplified Grants
- ➔ A stronger ability to attract and retain new members...
After all, success is contagious!

WHAT SUCCESS WILL MEAN TO YOU:

- ➔ The personal satisfaction of knowing you truly have made a difference
- ➔ The ability to have a lasting impact that will benefit your district and those in need

➔ **WHAT YOU'LL FIND IN *THE COACH'S PLAYBOOK*:**

- #1** Advice for helping clubs set goals ... page 4
- #2** Tips for sticking to a schedule ... page 6
- #3** Plans for building the EREY team ... page 8
- #4** Roles and responsibilities of the EREY team ... page 11
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COACH'S TIP

Customize
*The Coach's
Playbook* for
your district.

#1

Set Goals

Each year, Rotary clubs set goals to measure progress in reaching The Rotary Foundation's overall fundraising goals. Each president-elect is asked to submit the Fund Development Club Goal Report Form to his or her district governor-elect (DGE) by early May — before taking office. In turn, the DGE should forward the club goals to TRF in advance of the goal announcement at the RI Convention.



What is the goal-setting process?



How can I help clubs with goal setting?



Why is goal setting important?



COACH'S TIP

The goal-setting process can help identify future district leaders.

Goal setting is an excellent tool to identify and develop future leaders for your district. It begins a conversation you'll want to have with club presidents throughout the year on matters such as TRF education, member involvement in projects, and fundraising. It's also a great opportunity to begin grooming those strong club presidents for future district appointments.

Each president should be encouraged to meet the minimum US\$100 per capita goal for the Annual Programs Fund, *or* set an estimated 10-15 percent increase over last year's contributions, *or* gain 100 percent member participation.

In addition to setting an Annual Programs Fund goal, club presidents are being asked to set a Permanent Fund goal — increasing the number of Benefactors and Bequest Society members.

You and your EREY team can help clubs in a number of ways. Here are some tips for getting your clubs on track for success:

- ➔ Study the club's giving to determine what type of assistance is needed. If a club lacks a fundraising plan, work with its president and board to develop a fundraising strategy.
- ➔ Consider establishing a club "buddy system." Match strong fundraising clubs with struggling clubs, and encourage partnerships and idea sharing.
- ➔ Recruit speakers to help club members better understand the value of TRF's programs.
- ➔ Stay in touch with clubs regularly to provide ongoing support.



COACH'S TIP

Goals provide a unifying purpose for your team.

Notes

#2

Stick to a Schedule

As you are learning, many things must happen during the months leading up to the new Rotary year. Anticipating demands and deadlines will reduce the stress of planning big events and reaching goals. Although official terms of service begin 1 July, *now* is the time to build your team, outline job responsibilities, and start developing a strategy. Ask your club presidents-elect (PEs) to submit their Fund Development goals at PETS. Before then, EREY team leaders need to be in touch with the incoming PEs to guide them through the goal-setting process.



What should I be doing now?



What should I be asking others to do now?

➔ **HERE ARE SOME IMPORTANT DATES FOR YOU TO KEEP IN MIND:**

JANUARY: Identify candidates to fill key Rotary Foundation volunteer positions on the EREY team and schedule the first meeting.

FEBRUARY: Following the International Assembly, participate in the district team training seminar. Discuss and distribute Fund Development Club Goal Report Forms.

MARCH AND APRIL: Encourage participation in PETS and help collect the goal forms from the club presidents-elect.

MARCH–JUNE: Present a tentative club visit schedule to club presidents-elect at PETS to ensure a successful visit. Build a group e-mail distribution list with contact information for club presidents and club committee chairs.

MARCH–APRIL: Begin planning and selecting dates for Rotary Foundation seminars to be held July–November. Attend the district assembly and consider holding strategy sessions with assistant governors and EREY team.

APRIL–MAY: Submit 100 percent of club goal forms to TRF.

JUNE: Work with outgoing DG and leadership team to ensure a smooth transition: review club giving trends, Major Donor prospects, and unfinished district projects.

1 JULY: Lead by example. You and your EREY team members should make your annual contribution to the Annual Programs Fund. Remember to share the EREY message during your club visits.

JULY–NOVEMBER: Host Rotary Foundation seminars.

30 SEPTEMBER: Achieve 25 percent of your annual giving goal — have clubs send their contributions to TRF.

OCTOBER: Identify and/or secure at least one challenge major gift in the district.

NOVEMBER (FOUNDATION MONTH): Effectively promote TRF programs and importance of financial support from Every Rotarian, Every Year. Promote any available challenge gift opportunities, TRF-DIRECT, Rotary Foundation Sustaining Member program, Paul Harris Society, Benefactor program, and Bequest Society.

31 DECEMBER: Achieve 50 percent of your annual giving goal — have clubs send their contributions to TRF.

31 MARCH: Achieve 75 percent of your annual giving goal — have clubs send their contributions to TRF.

30 JUNE: Achieve 100 percent of your annual giving goal — have clubs send their contributions to TRF.

Forget where to send your contribution? It's The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL 60693, or contact the international office in your area.

The Rotary Foundation (Canada) Box B9322, PO Box 9100, Postal Station F, Toronto, ON M4Y 3A5



COACH'S TIP

Timing is everything!

#3

The EREY Team

The job of an effective EREY team is challenging, but having a strong team in place makes the work enjoyable, manageable, and, dare it be said, *fun*.



How many people should be on the EREY team?



Who should be on your team?

Successful past district governors (PDGs) and district Rotary Foundation committee chairs (DRFCCs) tell us they try to have approximately 10 people on their EREY team. DGs may ask their DRFCC to manage the district's EREY efforts, sharing leadership with the annual giving subcommittee chair and the assistant governors. Please see the organizational charts on pages 9 and 10 for a basic understanding of key players on your EREY team.



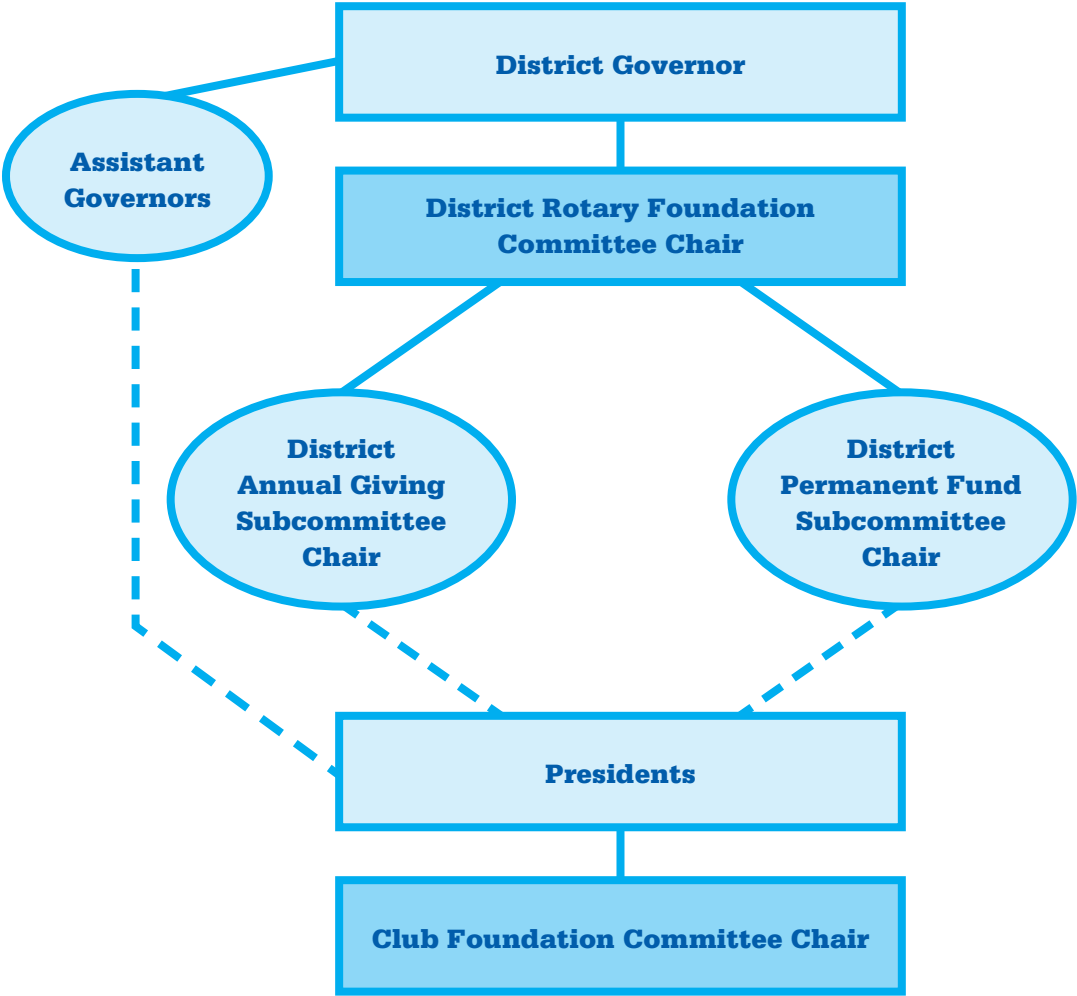
COACH'S TIP

Don't try to be a one-person team — get others involved.

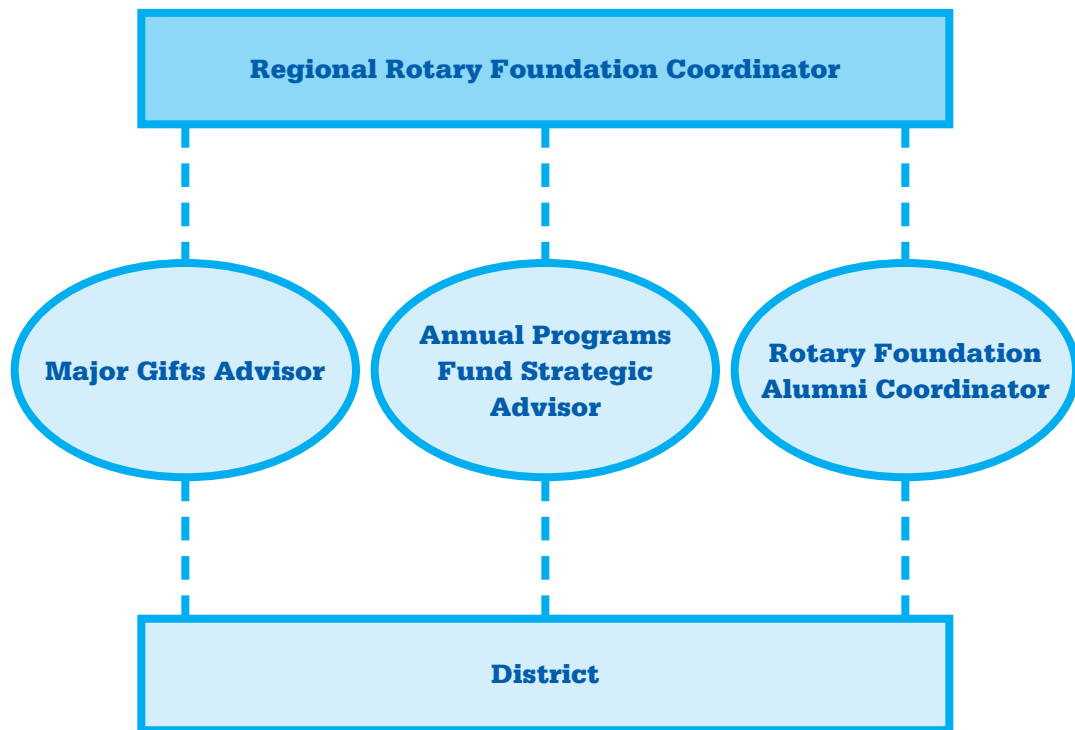
Many DGs choose to keep the number of team members fairly large so that each volunteer feels the workload is manageable. On average, each EREY team member will oversee and support the efforts of four to six clubs. Clubs should appoint their own Rotary Foundation chair/committee.

While the team's core composition should include the key volunteer positions mentioned above, some districts have chosen to use PDGs, up-and-coming district leaders, and anyone else who is passionate about TRF and willing to do the work. Geographically large districts should try to identify leaders from different areas.

Rotary Foundation Organizational Chart *(for fundraising)*



Zone Support Team



#4

Roles and Responsibilities

The job of the EREY team is critical. Several months before the year begins, the EREY team should contact the incoming club president to:

- ➔ Build a supportive relationship.
- ➔ Outline the district's key objectives for the year.
- ➔ Ensure delivery of key EREY materials including the *Club Success Kit* and goal-setting forms.
- ➔ Learn about the club's history and make-up of the members.
- ➔ Support and help plan TRF fundraising events.



Is there a job description for an EREY team?



What are the expectations?



When do they begin their assignments?



COACH'S TIP

Make sure everyone on the team understands his or her role.

The EREY team will be asked to educate, motivate, cultivate, and make the "ask" by:

- ➔ Assisting clubs with the goal-setting process
- ➔ Ensuring that each club has a Foundation chair
- ➔ Educating clubs through presentations on TRF
- ➔ Encouraging clubs to become 100% Rotary Foundation Sustaining Member Clubs and EREY Clubs
- ➔ Motivating and inspiring clubs to build upon and surpass past accomplishments

- ➔ Serving as a link between district-to-club communications on TRF
- ➔ Providing assistance to clubs facing fundraising difficulties
- ➔ Working with club leaders to identify prospects for major gifts to TRF

As a coach, you'll have certain expectations of your EREY team. Ask each team member to make a personal contribution of US\$100 or more to the EREY effort. They should ask club leaders (president, Foundation chair, treasurer, secretary, sergeant-at-arms) to do the same. Each EREY team member should track his or her clubs' successes, challenges, and progress toward goal achievement on a monthly basis. Here's one way to keep track:

Rating	Club	Goal	Gifts to Date	Notes
1	Ashland	\$6,000	\$6,000	100% TRF-DIRECT
1	Belmont	\$3,500	\$350	Big fundraiser in Jan.
4	Damen	\$3,000	\$0	Lacks plan/needs help
3	Edgeton	\$2,000	\$300	Struggling with effort
2	Frankfurt	\$18,000	\$6,000	Big club-meet w/board

➔ **SAMPLE RATINGS:**

- 1** = Leader
- 2** = Challenger (above district average)
- 3** = On the way (below district average, needs support)
- 4** = Help! (has significant challenges, needs attention)

➔ **TO ENSURE A CLUB'S SUCCESS,
USE THE FOLLOWING CHECKLIST AS A GUIDE:**

- Complete club goal form.
- Select club Foundation chair.
- Form club TRF fundraising committee.
- Train club leadership.
- Ensure club leadership has pledged/
contributed.
- Educate new and existing club members.
- Motivate club members.
- Make a personal “ask” for a gift from
every club member.
- Identify Paul Harris Society and major
gift prospects.

#5

Developing an Identity Project

Many districts that have had the most success in raising funds for the Annual Programs Fund first identify a few key projects to help “put a face” on The Rotary Foundation and inspire the members to contribute. An identity project is a project that your members (and the community-at-large) can associate easily with the club and district.



How can I develop a TRF identity project?

How do I ensure continued funding for APF-SHARE?

EXAMPLE 1

Rotarians in our district were really inspired by a story about how a clean water Matching Grant project “stopped the children from dying” in Haiti. The district leaders decided that once members’ contributions exceeded the district’s annual giving goal, any additional funds raised that year (and later redistributed through SHARE) would be earmarked to support future clean water Matching Grant projects. Now, Rotarians in our district equate giving to the Annual Programs Fund with the good accomplished through our clean water projects.

EXAMPLE 2

Our district sets program goals in order to set and achieve annual giving contribution goals. We hold a districtwide meeting each year to help determine which Foundation programs and projects we want to support in the future. We estimate how much will be available in DDF over the next three to four years, then figure out what additional funds we’ll need to raise from our members and clubs to support them. By involving members and clubs, we’ve also succeeded in expanding the number of outright major gifts to the Annual Programs Fund.

EXAMPLE 3

For our clubs that don't add a TRF gift into their dues invoicing, we like TRF-DIRECT (automated giving program currently available in the USA and Canada). However, we didn't get a lot of members to sign up until we customized the brochure to include a photo of one of our district's projects on the cover. Very quickly, people connected their gift to the Annual Programs Fund to this project, and we were able to get more people to enroll.

CONSIDER SOME OF THE FOLLOWING:

- #1** Focus on Rotary's emphases: literacy, water management, health and hunger, and the family of Rotary, to determine how to partner with TRF on projects that fall under these areas and would most appeal to your membership.
- #2** Ask your clubs involved in international TRF projects to tell their stories.
- #3** Partner with another district whose members are already inspired by their work.
- #4** Get firsthand experience.
 - Use a Volunteer Service Grant to send a team of Rotarians from your district to visit the site of a Matching Grant project or visit an area of the world in need. They will come back with very real project or area needs and a passion to help raise the money to meet those needs.
 - Enter into a GSE with a developing country — and encourage your outbound team to find a project that could grow to be a districtwide TRF identity project.
 - Select an outbound Ambassadorial Scholar interested in going to a developing country, then encourage that scholar while abroad to help the district identify a Matching Grant project.



COACH'S TIP

Encourage members to get involved in TRF projects.

➔ **MAKING THE CASE FOR SUPPORTING THE IDENTITY PROJECT THROUGH THE ANNUAL PROGRAMS FUND/*SHARE* SYSTEM (APF-*SHARE*):**

Once a passion develops for a specific project, it's tempting for Rotarians to contribute directly to the project. Rotarians want to support a variety of worthy charitable projects — just make sure their efforts **complement and don't compete** with a club's and district's overall support of TRF. The benefits of working through the Annual Programs Fund are:

- ➔ **Ensures the district continues to have funding for all its projects.** Supporting identity projects without adding funds to your “DDF bank account” will hurt future efforts to support GSEs, Ambassadorial Scholars, and Matching Grants. Rotarian interests always evolve over time, so it's important to have funds available for projects not yet determined.
- ➔ **Encourages your best volunteers and donors to invest their time, talent, and resources toward strengthening TRF.** Rotary is uniquely positioned to leverage its members and volunteers — let's ensure that our energies are used to expand Rotary's influence and our ability to do good in the world.
- ➔ **Ensures Paul Harris Fellow contributors get the recognition they deserve.** Too often, Rotarians sometimes think they are giving to TRF when they write a check for an international club project and are disappointed to learn that their gifts didn't qualify for PHF credit. By contributing to the Annual Programs Fund, Rotarians receive credit toward Rotary Foundation Sustaining Membership, Multiple Paul Harris Fellow Recognition, Paul Harris Society membership, and Major Donor Recognition.
- ➔ **Properly stewards your district funds.** APF-*SHARE* creates a strong structure and set of controls that assure proper stewardship.

- ➔ **Benefits Rotary by having a strong international presence.** Imagine our limits in battling polio — a challenge that's taken us longer than a generation — if clubs had chosen to put out small fires instead of working together. In the long term, we are far more effective when we work through the collective power of TRF.
- ➔ **Ensures an equitable distribution based upon needs and interests.** The Annual Programs Fund is the engine that provides funding through DDF and leverages contributions from your own club and clubs throughout the world. This funding is also crucial to continue providing the seeds for future ideas of service.

Although it requires a longer lead time, the three-year *SHARE* cycle also provides for the highest levels of quality control (the administering of funds) and charitable impact (the most deserving causes receiving the appropriate level of funding).

HOW TO OFFER QUICK HELP RESPONDING TO SPECIAL NEEDS:

- ➔ Each year millions of dollars in DDF go unspent. Consider using these funds to meet the interest of the district in responding to short-term disaster recovery projects, PolioPlus Partners, and Ambassadorial Scholarships for low-income countries.
- ➔ Although separate from the Annual Programs Fund, The Rotary Foundation's Donor Advised Fund provides a charitable mechanism for Rotarians to respond more quickly to certain large-scale disaster-relief projects. Please visit www.rotary.org for more details.

#6

Your Support Team

TRF has developed a volunteer structure to support you in your job. In addition, TRF staff members are devoted to serving you.



Who are the volunteers and what are their jobs?



How do I best use them?

REGIONAL ROTARY FOUNDATION COORDINATORS

Regional Rotary Foundation coordinators (RRFCs) are responsible for the overall promotion of programs and fundraising for TRF. RRFCs are expected to train zone and district leadership, and oversee the team in setting and achieving fundraising goals in their assigned districts. RRFCs can be called upon to make presentations at large functions, assist in meetings with the boards of large clubs, and meet with potential and existing Major Donors. They work directly with strategic advisors and major gifts advisors in supporting your efforts.

ANNUAL PROGRAMS FUND STRATEGIC ADVISORS

Strategic advisors (SAs) are volunteers who oversee and support EREY fundraising efforts in a cluster of districts. Most often, SAs are PDGs who are familiar with day-to-day challenges. SAs can be called upon to assist with Foundation seminars, train district leaders in annual giving, make presentations on EREY to clubs, assist clubs that need support, monitor district progress, serve as vital communications links between districts and RRFCs, and help identify and solicit Annual Programs Fund challenge gifts.

MAJOR GIFTS ADVISORS

Major gifts advisors (MGAs) are volunteers who oversee and support the overall TRF effort in raising major gifts for either

the Annual Programs Fund or the Permanent Fund. Like SAs, they are most often past district governors. Their primary focus is on identifying, cultivating, and soliciting major gifts. MGAs can be called upon to make presentations on TRF and to support district efforts aimed at increasing membership in the Bequest Society, along with making presentations to clubs and training district leaders in major gift work.

ROTARY FOUNDATION ALUMNI COORDINATORS

The goal of Rotary Foundation alumni coordinators (RFACs) is to ensure that Rotary clubs and districts make TRF alumni integral to Rotary, urge clubs to consider alumni as potential Rotary club members and potential contributors to TRF, and use alumni as effective advocates for TRF programs.

DISTRICT ROTARY FOUNDATION CHAIR

The district Rotary Foundation committee chair (DRFCC) assists the district governor and works with the district Foundation committee to coordinate district Foundation activities to promote The Rotary Foundation Sustaining Member program and ensure the district Rotary Foundation seminar is effective. The DRFCC also provides strategies to help clubs realize APF goals and helps identify, cultivate, and solicit potential Major Donors.

ANNUAL GIVING SUBCOMMITTEE CHAIR

The annual giving subcommittee chair (AGSC) assists the DG, AGs, DRFCC, and club presidents in achieving the minimum APF US\$100 per capita goal; actively promotes The Rotary Foundation Sustaining Member program at district and club functions; makes club visits and monitors noncontributing clubs and district fundraising projects; helps identify and solicit potential Major Donors for challenge gifts; and shares contribution report information with AGs.



COACH'S TIP

Call on the experts for advice.

DISTRICT PERMANENT FUND CHAIR

The district Permanent Fund subcommittee chair (DPFSC) assists the DG, AGs, DRFCC, and club presidents in achieving Permanent Fund goals; actively promotes Benefactor and Bequest Society programs; organizes major gift seminars; and helps cultivate and track current and prospective Major Donors.

CLUB FOUNDATION CHAIR

In many cases, club Foundation chairs are responsible for promoting TRF within the club and helping set up the club's program on a weekly basis. Club Foundation chairs should be considered an essential resource in each club.

In addition to the positions listed above, there are other district leaders who can help strengthen the district. Make sure to involve the scholarships subcommittee chair, GSE subcommittee chair, grants subcommittee chair, and alumni subcommittee chair. They can help promote TRF programs in the clubs, increase overall support of TRF, and play a big role in attracting new members.



TRF STAFF

ANNUAL GIVING OFFICER

Responsible for helping club and district officers achieve their annual giving goals, including:

- Cultivating gifts to the Annual Programs Fund and other major gifts
- Participating in district Rotary Foundation seminars and other Rotary meetings
- Working closely with district and zone leaders in developing clearly defined fund development strategies

MAJOR GIFTS OFFICER

Identifies, cultivates, and solicits individual major gift prospects in partnership with the volunteers. These duties include:

- ➔ Maintaining a portfolio of major gift prospects, and cultivating and soliciting major gifts of US\$50,000 or more
- ➔ Meeting with individual major gift prospects during qualifying, cultivation, and stewardship visits
- ➔ Traveling and working with volunteer committees on development matters at district, multidistrict, and other Rotary meetings

DEVELOPMENT SERVICES COORDINATOR

Serves as a liaison between TRF, clubs, and donors, with duties that include:

- ➔ Maintaining accuracy of donor records
- ➔ Assisting with Paul Harris Fellow Recognition requests
- ➔ Supporting clubs in their goal achievement efforts

BENEFACTOR/BEQUEST SOCIETY/MAJOR DONOR COORDINATOR

Responsible for administering Benefactor, Bequest Society, and Major Donor Recognition, including:

- ➔ Generating Benefactor, Bequest Society, and Major Donor reports
- ➔ Ensuring proper recognition is sent
- ➔ Maintaining accuracy of donor records

TRF CONTACT CENTER

Currently serving North America, the Contact Center is designed to promptly respond to Foundation-related questions and to resolve simple donor service needs. The phone number is 866-9Rotary (866-976-8279). The Contact Center can also be reached by e-mailing contact.center@rotary.org.

#7

Working with Challenging Clubs

Every district is faced with challenging clubs. Although these clubs vary in size from as few as 10 members to 800 or more, some of their problems are similar. In fact, both large and small clubs may have a sense of their own limited resources and difficulties with declining membership.



How do I convince a large club to support TRF when it has its own foundation?



How can I get a struggling small club to contribute to TRF?

➔ **HERE ARE SOME SUGGESTIONS FOR APPROACHING LARGE AND SMALL CLUBS:**

LARGE CLUBS

Large clubs typically have three characteristics: (1) a board of directors, (2) their own private charitable foundation, and (3) sometimes an exclusive focus on community projects.

Here are some critical first steps to take in approaching a large club for support:

- ➔ Do your homework: research as much information about the club and its history as you can.
- ➔ Identify club members who have supported TRF and are willing to serve as a liaison between the district and the clubs.
- ➔ Enlist the support of key Rotary volunteers: your RRFC, district Rotary Foundation chair, annual giving

subcommittee chair, major gifts advisor, Annual Programs Fund strategic advisor, alumni coordinator, and the club's Foundation chair.

➔ Set up a meeting with the club's board of directors and key Rotary volunteers before any formal club presentation to encourage cooperation.

#1 Acknowledge how important the club is to the district's overall success.

#2 Explain specifically what you hope to accomplish by today's meeting:

- More program time at club meetings to educate members about TRF
- Plan to have members contribute regularly to TRF
- Explore ways to work together in the future

#3 If the club has its own foundation, highlight the importance of its work locally, but focus on the benefits of supporting TRF. Explain that the relationship between the two foundations is not a competition but a partnership. Point out how through the *SHARE* system contributions are returned to the district through the District Designated Fund.

#4 Remind the board how more international involvement can lead to renewed enthusiasm among members and may help in their membership development.

SMALL CLUBS

Fundraising is probably one of several problems a small club may be facing. Members may be aging, recruitment may be difficult, and the club may lack initiative or motivation. In these cases, support is needed on several levels.



COACH'S TIP

Identify challenges and opportunities.

Here are some critical first steps to take in approaching a small club for support:

- ➔ Identify key issues/obstacles.
- ➔ Encourage contributions from the club through fundraising events.
- ➔ Consider partnering the club with a stronger nearby club. This can help with both fundraising efforts and civic projects.
- ➔ Provide the club with strong TRF speakers.
- ➔ Share ideas for good non-Rotarian guest speakers.
- ➔ Share ideas for recruiting new members.
- ➔ Stay in touch regularly to make sure the club develops strong relationships within the district — with leaders, other clubs, and individual members.
- ➔ Acknowledge the club's progress.

Small clubs are often concerned about the profiles of their members: too elderly, too young, lacking funds, or simply not interested. Usually it's just a matter of getting the club involved in a great project to counteract the resistance and obstacles. Encourage the club to undertake a small humanitarian project and watch the results: the "too young" become terrific workers, the "too elderly" become wonderful guides and mentors, and the "too disinterested" all of a sudden get passionate about Rotary!

#8

Presentations That Score

Engaging your audience and touching on issues that are important to them are the keys to a successful presentation.



What should I do to prepare the presentation?



How can I make an interesting presentation?



Are there any special tips for a district governor's speech to clubs?



USEFUL TIPS TO SHARE FOR MAKING ROTARY FOUNDATION PRESENTATIONS

PLANNING

Start early! Following these steps will put you on the right path to ensuring a spot as a keynote speaker at a club:



Communicate with the club president before 1 July to arrange a date for giving a presentation about TRF. Identify any particular messages he or she would like you to convey.



Gather information about club projects. Has the club benefited from TRF programs such as Group Study Exchange, Matching Grants, or Ambassadorial Scholarships? Make sure you acknowledge the club's work before asking for additional TRF support.



Collect any photos or slides that will help add a visual component to your presentation. The more creative the presentation, the better. Try to design an original presentation or use one of the PowerPoint presentations available from TRF to assist you.

COACH'S TIP

Practice makes perfect.

PRESENTATION ELEMENTS

Not everyone is comfortable with public speaking, but everyone is capable of delivering a good presentation. Here are some suggestions:

- ➔ Introduce yourself and thank the club president and members for giving you an opportunity to speak about TRF.
- ➔ Review the four Avenues of Service and emphasize #4 — International Service. Note that every Rotarian should assume responsibility for achieving Rotary's four objectives. Through TRF, Rotarians can make a difference in the lives of people throughout the world by improving their health, helping them learn to read, and teaching tolerance of others.
- ➔ Acknowledge the club's past accomplishments and contributions to TRF through Matching Grant projects, GSE teams, Ambassadorial Scholarships, etc. Also, identify and thank clubs that have been top supporters in the district. Remind the audience that these stories are "our stories" and that The Rotary Foundation is "our" Foundation. Incorporate personal experiences into your speech and don't hesitate to tug on people's heartstrings.
- ➔ During the presentation recognize current Rotary Foundation Sustaining Members. If they don't already have an EREY Sustaining Member sticker (956), take a moment to make sure they get one.
- ➔ Express appreciation and encourage presentations of Paul Harris Fellow, Major Donor, and Bequest Society recognitions.
- ➔ Recognize Major Donors and Paul Harris Society and Bequest Society members at every event.
- ➔ Show a 10-minute video or PowerPoint presentation. The *Every Rotarian, Every Year* DVD (978-MU) is a great tool to use.

- ➔ Don't forget to "close the deal"; make sure you ask for contributions during the presentation. Promote TRF-DIRECT (automatic contributions to TRF) where available.

PRESENTATION KEYS

- ➔ Put yourself at ease by practicing your speech.
- ➔ Be passionate! Don't just read notes; bring the presentation to life!
- ➔ Be motivational! Inspire club members to become enthusiastic about supporting TRF. They should feel more connected when you're finished.

➔ PRESENTATION TIPS FOR THE DISTRICT GOVERNOR'S SPEECH:

"My first official speech was a train wreck in slow motion. I set a new record for length, nearly 40 minutes. But, in all fairness, it generated some positive comments. Only five people appeared to be sound asleep. Others were visibly dozing — or shaken. Why did two clubs have to show up? Oh well, slashing and rewriting as we speak. Nine more clubs in the next two weeks. YIKES!"

— A rookie district governor

The official visit is often the district governor's most daunting task. Here are some tips to make it effective, productive, and well-received:

- ➔ **In late June, personally call the club president-elect (PE) to confirm your visit date. Use the opportunity to:**
 - **Congratulate the PE on his or her new role.** Share with him or her some of your fondest memories when you served as club president.
 - **Share your vision for the district this year.** Mention things like greater participation in programs, increased fellowship between clubs, and unified effort to increase members. Be specific on how the PE could be part of this vision.

- **Plant the seed for TRF support.** Mention that you'd like to recognize the PE during your speech and highlight his or her leadership qualities. Would he or she be willing to make the first US\$100 minimum gift to TRF to get the momentum going?

➔ **During your presentation:**

- **Narrow your focus.** Too often we try to say too much. Even though you have 20 goals for your year, just highlight a few during your talk. More important, make Rotarians feel good about being in Rotary. Start by introducing the four points, then give details on each point during the body of the speech. Conclude by (guess what!) summarizing the four points.
- **Add humor and heart.** Irony is good, and self deprecating humor works because it is safe and makes you appear humble. Be careful with jokes, because they can either offend or sound old and worn out. Pulling at the heart is easy with the great TRF stories. Keep them short — they'll carry more impact.
- **Make it personal.** Telling one insight about yourself is always good. A few examples might be how you got your nickname; your most embarrassing moment in Rotary; the first day you really became a Rotarian; or how you used to skip out on the governor's visit each year. Try to weave the insight into a heartwarming story, but don't use the insight to highlight yourself. Instead, tell how the heartwarming story truly impacted your life.

Generally we try to be too polished, rather than too real.
Remember we are just Rotarians taking our turn in service!

#9

Setting the Stage for Major Gifts

The Paul Harris Society (PHS) is a special district program that recognizes Rotarians and friends of The Rotary Foundation who annually contribute US\$1,000 or more to the Annual Programs Fund, PolioPlus, PolioPlus Partners, or the Humanitarian Grants Program.

This wonderful program can be easily adopted by your district at the local level. We suggest appointing a district PHS coordinator or chair to work in partnership with the district's Foundation chair and annual giving subcommittee chair. For more information on the society, please refer to the *Paul Harris Society Brochure* (099) or contact TRF staff (erey@rotary.org).



How does a district benefit by having the Paul Harris Society?



How is recognition handled?

Joining the Paul Harris Society is often the first step in becoming a Major Donor. Rotarians with the capacity and desire to support the Annual Programs Fund can become key district supporters in the future. The society

- Allows Rotarians to achieve Major Donor status quickly
- Increases overall district support for the Annual Programs Fund and increases available funds for club and district projects
- Builds an ongoing relationship between the Rotarian and TRF
- Helps districts begin building a list of prospective Major Donors

Paul Harris Society members are eligible for Paul Harris Fellow and Major Donor recognition. Please be aware that the district, not TRF, provides the society recognition. Many districts encourage the use of TRF-DIRECT to help Rotarians contribute through smaller, regular gifts and to track Paul Harris Society members more efficiently.

Notes

#10

The Permanent Fund

While contributions to the Annual Programs Fund provide the necessary funding to operate TRF's current programs, gifts to the Permanent Fund ensure TRF's ability to address the world's greatest needs for generations to come. Gifts to the Permanent Fund are held in perpetuity as part of an endowment. These gifts are professionally invested, and only a portion of the Permanent Fund earnings are used each year.



What are ways to give to the Permanent Fund?



Is there a Permanent Fund goal?

SUPPORTING THE PERMANENT FUND

Testamentary gifts through a will or other estate plan; life income gifts (e.g., charitable remainder trusts, charitable gift annuities, pooled income fund); or outright gifts of property, cash, or other assets are all ways to support the Permanent Fund. Please visit the TRF pages on the RI Web site at www.rotary.org for detailed information about the various giving vehicles available. You may also contact the major gifts officer or annual giving officer assigned to your geographical region.

PERMANENT FUND GOAL

In September 2006, TRF achieved the initial milestone of reaching US\$500 million in contributions and commitments to the Permanent Fund. The Rotary Foundation Trustees have established a goal of \$1 billion by 2025 to help ensure future funding of TRF's programs. This goal encompasses both current assets and future commitments through the Bequest Society and Benefactor programs.

#11

Online Services

Technology has made communicating with 1.2 million Rotarians much easier! Every Rotary leader is now expected to have a computer with access to e-mail and the Web. If you have not already registered for access to Rotary Business Online, do so now by logging on to the Member Access section of the RI Web site (www.rotary.org).



How do I keep track of the district's progress?



How do I track a club's performance?



Where do I get forms, brochures, and other materials?

➔ **HERE'S A QUICK SUMMARY OF WHAT YOU CAN FIND ONLINE:**

- ➔ Access to personal contribution history and club and district reports through Member Access (Due to limited access of some members, be sure to share these reports with your EREY team. Please see the Online Member Access Grid on page 33.)
- ➔ The RI Online Catalog (<http://shop.rotary.org/catalog>) for all brochures, audiovisuals, and other materials, including the EREY DVD
- ➔ A Web page exclusively devoted to EREY with everything from PowerPoint presentations to useful tips on successful EREY strategies (<http://erey.rotary.org>)
- ➔ TRF forms relating to contributions, goal setting, etc. (www.rotary.org)

Online Member Access Grid

	District Governor	District Governor-elect	District Foundation Chair & Annual Giving Subcommittee Chair	Club President and Club Secretary	All Rotarians
Update Membership Data				•	
Update Club Data				•	
Contribute to TRF	•	•	•	•	•
View Personal Contribution History	•	•	•	•	•
Pay Semiannual Dues				•	
Search <i>Official Directory</i>	•	•		•	
Manage E-mail Subscriptions	•	•	•	•	•
View Club Recognition Summary	•	•	•	•	
View Monthly Contribution Report	•	•	•	•	

MONTHLY CONTRIBUTION REPORT

Typically updated around the 15th of every month and available via Member Access on the RI Web site, www.rotary.org. (See grid on previous page for access rights.)

Any Rotarian can view total monthly district contributions via the RI Web site at www.rotary.org/foundation/development/contribution.html.

Rotary Foundation Monthly Contribution Report 1-Jul-2005 to 30-Jun-2006													(In US Dollars)
Club No.	Name	No. of Members	APF Goal Amount	APF Goal % Achieved	APF Per Cap	—Annual Giving—		—Restricted Giving—		—Permanent Fund—		—Total—	
						Month	Period	Month	Period	Month	Period		
1234	District 1234	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	

➔ TIPS FOR USING THE MONTHLY CONTRIBUTION REPORT

- A.** The APF Per Capita column identifies the average contribution by club members to the Annual Programs Fund. This average per capita amount only includes unrestricted annual gifts.
- B.** Total Restricted Giving reflects the club's commitment to specific projects, which may include PolioPlus, Matching Grants, and more.
- C.** The Permanent Fund total reflects outright contributions to the Permanent Fund, including realized estate gifts.
- D.** The Total reflects the combined amount of annual unrestricted gifts, restricted gifts, and Permanent Fund gifts for the year.

CLUB RECOGNITION SUMMARY

Updated daily and available via Member Access on the RI Web site, www.rotary.org. (See grid on page 33 for access rights.)

The Rotary Foundation — Club Recognition Summary as of Date, Month Year Rotary Club, USA								
District:	1234	Paul Harris Fellows:	102	Benefactors:	1	All Time Giving:	\$138,680.50	
Club:	1234							
Account No.	N A M E	Club Member	Recognition Amount	Sustaining Member Date Achieved — Current Year	Sustaining Member Date Achieved — Previous Year	Current PHF Level	PHF Date	Foundation Recognition Pts.
1234	R/C of Rotary Club							19,425.50
*5089984	America, Jose	N	\$1,000.00	08-Jul-06	13-Jul-05	PHF	Jun-1988	
5516652	Cameron, Casey C.	Y	\$200.00					
*666933	Castillo, Aja	N	\$2,000.00			PHF+3	Jun-1986	
662048	Gallas, Edward	Y	\$1,000.00	15-Jul-06	15-Jul-05	PHF	Oct-1987	100
*666977	Gordon, Andréa	N	\$1,600.00			PHF	Jun-1991	
666963	King, Brian	Y	\$2,000.00 +		01-Apr-06	PHF+8	Jun-2002	14,000.00

TIPS FOR USING THE CLUB RECOGNITION SUMMARY REPORT

- A.** The Recognition Amount column reflects a combination of both funds contributed as well as Foundation Recognition Points received. Recognition points only count toward Paul Harris Fellow (PHF) Recognition, but do not count toward Paul Harris Society membership or Major Donor Recognition.
- B.** The Sustaining Member Date Achieved — Current Year column shows the date when contributions recorded for the year have reached US\$100 or more for that particular Rotarian. It is a great tool for tracking EREY participation within your club.
- C.** The Current PHF Level column indicates the level of Paul Harris Fellow Recognition achieved.
- D.** Individual Rotarians and the club itself can have Foundation Recognition Points available to award to other Rotarians and non-Rotarians. These extra points can be a great tool for gift challenges and gift matches to increase EREY participation and achieve 100% PHF club status.

OTHER USEFUL TRF REPORTS

The following reports are available to provide you with detailed information about your district:

Major Donor, Benefactor, and Bequest Society Reports

Available upon request from your TRF Development Services coordinator.

District Profile

Shows a district's TRF contributions and program activity over the past five years, and gives the total numbers of Paul Harris Fellows, Major Donors, Benefactors, and Bequest Society members for that year and all years. Also available upon request.

TIPS FOR USING THE REPORTS EFFECTIVELY

- ➡ Before each club visit, review the Club Recognition Summary and Monthly Contribution Report to gauge EREY activity. Determine if the club needs an extra hand with its fundraising efforts.
- ➡ Acknowledge Major Donors and Bequest Society members in the club. Recognize their impact on TRF programs and cultivate their relationship with TRF.
- ➡ Cultivate relationships with Multiple Paul Harris Fellows and Paul Harris Society members.
- ➡ Explain how club members' available Foundation Recognition Points can help increase annual giving through matches.
- ➡ Congratulate the club on past accomplishments and inspire members to even greater work!

TRF-DIRECT (currently available in the USA and Canada)

TRF-DIRECT is guaranteed to make your life and each club treasurer's life easier.

TRF-DIRECT allows donors to automatically transfer funds from their checking account (cheque account in Canada), savings account, or credit card (miles, miles, miles!) to TRF via electronic fund transfers. Aimed at making the contribution process convenient and cost-effective, the program allows donors to direct predetermined amounts to the Annual Programs Fund on a regular (monthly, quarterly, or annual) basis. (Remember to read the fine print for minimums: US\$10 monthly or \$25 quarterly for checking/savings; \$25 per recurring transaction for credit cards.)

➔ **HERE'S WHAT WE SUGGEST:**

- Enroll in TRF-DIRECT so you see how easy it is.
- Encourage club presidents and the district EREY team to do the same.
- Encourage integrating TRF-DIRECT with your district's Paul Harris Society program.
- Promote TRF-DIRECT at TRF seminars with firsthand testimonials of folks who are using the automatic deduction.
- Spread the word: TRF-DIRECT is the easiest way for clubs to become a 100% Rotary Foundation Sustaining Member Club, reach EREY club status, and achieve the club's annual giving goals.
- See district giving get off to a fast start!

#12

Resources

Many resources are available to assist you, your districts, and your clubs in achieving full participation in Every Rotarian, Every Year, including:

EREY Club Success Kit (958) — available in 9 languages

EREY Brochure (957) — available in 9 languages

Paul Harris Society Brochure (099) — available in 9 languages

**EREY Rotary Foundation Sustaining Member
Badge Stickers (956)**

**TRF-DIRECT Donation Brochures (998-EN-CND, for Canada;
998-EN-US, for USA)**

EREY Posters (959) — available in 9 languages

EREY DVD (978) — available in 9 languages

EREY quarterly e-newsletter — available in 9 languages

Contact the Rotary Distribution Center directly for publication orders. To order from the RI Web site, click on “Shop” to view publications and audiovisual materials available through RI’s Publications Order Services. You may also contact Publications Order Services by phone: 847-866-4600; fax: 847-866-3276; or e-mail: pbos@rotary.org.

Additional resources on the RI Web site include:

EREY PowerPoint presentations

Fundraising Success Strategies

Weekly Foundation Thoughts

- ✓ **To find nearly all of these materials and much more, go to www.rotary.org or directly to the EREY Web page: <http://erey.rotary.org>.**
- ✓ **Be sure to use these resources in your TRF presentations and contact TRF staff for additional assistance.**

One final note before we officially sound the buzzer and your year begins — your leadership is going to be crucial. We have confidence you can do it! Although, we can't fully prepare you for the year ahead, we hope you feel far more knowledgeable and excited about your role in the EREY effort — now that you've read *The Coach's Playbook*.

Notes



GOOD LUCK!

Notes

A FUND DEVELOPMENT PUBLICATION

QUESTIONS? CALL THE EREY HOTLINE: 847-866-3352

E-MAIL: EREY@ROTARY.ORG

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