

**THE ROTARY FOUNDATION**  
**2009-10 FUND DEVELOPMENT**  
**CLUB GOAL REPORT FORM**

EN—(908)



(Please return completed form to your **district governor-elect** by **1 May 2009**)

Club Name (please print) \_\_\_\_\_ Club Number \_\_\_\_\_

Country \_\_\_\_\_ District \_\_\_\_\_

2009-10 Club President's Name (please print) \_\_\_\_\_

2009-10 Club President's Signature \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

**ANNUAL PROGRAMS FUND GOAL**

Your Annual Programs Fund contributions support humanitarian and educational 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 (APF) goal by multiplying the number of members in your club by a per capita figure appropriate to your club.

NUMBER OF 2009-10 CLUB MEMBERS: \_\_\_\_\_

AVERAGE AMOUNT PER MEMBER: \_\_\_\_\_ US\$ \_\_\_\_\_

**2009-10 APF-SHARE GOAL:** \_\_\_\_\_ US\$ \_\_\_\_\_  
 (Club members x per capita goal)



**ROTARY'S US\$200 MILLION CHALLENGE GOAL FOR POLIO ERADICATION**

Rotary has been challenged to raise US\$200 million by 30 June 2012 to meet a Challenge grant from the Bill & Melinda Gates Foundation. To meet this Challenge, every Rotary club is encouraged to set a minimum goal of US\$2,000 per year (2009-10, 2010-11, 2011-12), using personal outright contributions, community fundraisers, and other funding sources.

**2009-10 ROTARY'S US\$200 MILLION CHALLENGE GOAL:** \_\_\_\_\_ US\$ \_\_\_\_\_  
 (One collective goal for the entire club)



**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:** \_\_\_\_\_  
 (US\$10,000 or more outright)

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

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



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# EVERY ROTARIAN, EVERY YEAR

## 2009-10 FUND DEVELOPMENT CLUB GOAL-SETTING INSTRUCTIONS

Club presidents-elect are asked to set goals for the Annual Programs Fund (APF), Permanent Fund, and Rotary's US\$200 Million Challenge for polio eradication.

### Setting your 2009-10 Annual Programs Fund goal

The Annual Programs Fund is the source of unrestricted giving and funds many of The Rotary Foundation's humanitarian and educational programs. Rotary clubs are encouraged to either set a minimum APF-*SHARE* goal of US\$100 per member or an enhanced goal. Clubs that have surpassed \$100 per capita may set an enhanced goal of 10 percent higher than the club's highest per capita achievement. In addition to personal outright contributions, club fundraisers and other sources may be pursued to achieve club per capita goals.

- Consult with your district governor-elect and training team to assess your club's fundraising potential.
- Review your district's Monthly Contribution Report with your club leadership to set your 2009-10 APF goal.\*
- Evaluate the financial capacity of your club membership to identify potential Major Donors and challenge gifts.

\* *Contributions to Matching Grants and the Permanent Fund do not count toward your Annual Programs Fund goal. Contributions to Annual Programs Fund are eligible toward Paul Harris Fellow, Major Donor, and club banner recognitions.*

### Setting your 2009-10 goal for Rotary's US\$200 Million Challenge for polio eradication

Contributions to Rotary's US\$200 Million Challenge\* support the PolioPlus program and count toward meeting the Challenge grant awarded by the Bill & Melinda Gates Foundation. In figuring your club's Challenge goal, your club should consider the following sources of financial support:

- Community fundraising events, Interact club fundraisers, Rotaract club fundraisers
- Family of Rotary (Foundation alumni, Rotary Fellowships, new club members since 2005)
- Business/corporate donations
- Major Donors (US\$10,000 or more)
- Other (club and district foundations, etc.)

\* *Contributions to Rotary's US\$200 Million Challenge do not count toward your Annual Programs Fund goal. Contributions to Rotary's US\$200 Million Challenge do qualify for Paul Harris Fellow and Major Donor Recognition.*

### Setting your 2009-10 Permanent Fund goals

In addition to outright contributions to the Annual Programs Fund, all Rotarians are encouraged to invest in tomorrow by designating an outright contribution or a portion of their estate to the Permanent Fund, the Foundation's endowment. Individuals can become a Benefactor or Bequest Society Member by including the Permanent Fund in his or her estate plan. Permanent Fund goals include both Benefactors and Bequest Society Members.

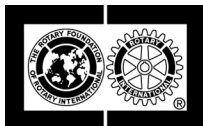
- Consult with your district governor-elect and training team to assess your club's potential for supporting the Permanent Fund.
- Review your club's Benefactor and Bequest Society lists with your club leadership to set your 2009-10 Permanent Fund goals.\*
- Evaluate the financial capacity of your club membership to identify potential major gifts to the Permanent Fund.

\* *Contributions and commitments to the Permanent Fund do not count toward your Annual Programs Fund goal, Paul Harris Fellow Recognition, or club banner recognition.*

### Submitting your 2009-10 Club Goal Report Form – Due 1 May 2009

- Print clearly and complete the 2009-10 Club Goal Report Form.
- Turn in the white **and** pink copies of the completed Club Goal Report Form to your **district governor-elect**; keep the yellow copy for your records.
- **Be sure to turn in your goal form by 1 May 2009.**

The Trustees will use your Club Goal Report Form to calculate the worldwide 2009-10 Annual Programs Fund Goal.



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