

COACH'S NAME

THE COACH'S PLAYBOOK



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

教練手冊

為貴地區 EREY 募款成功
實況報導指南

國際扶輪第 4B 地帶 地域扶輪基金協調人 邵偉靈前總監 RRFC Dens (2005~08) 主編
國際扶輪第 4B 地帶 年度計劃基金策略顧問 許勝傑前總監 PDG Archi (2005~08) 翻譯

EVERY
ROTARIAN
EVERY
YEAR

教練手冊

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EVERY
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每位總監當選人的指南

Every DGE's Guide

■ 輔導貴地區團隊為「每位扶輪社員，每年」計畫募款成功

每位教練都希望他或她的團隊成功。團隊的組員希望得到勝利經驗。這本指南是你對於扶輪基金會的「每位扶輪社員，每年」計畫(EREY)工作獲得成功的手冊。

成功對於你的地區有什麼樣的意義：

- 有更多的地區指定基金(DDF) — 這募款機制提供支持扶輪基金會的計畫，如團體研究交換、配合獎助金、以及大使的獎學金。
- 扶輪社員更熱衷於介入地區和扶輪社所支持的計畫，以及更多支持扶輪基金會的計畫的熱情
- 更多的機會支持扶輪社所提議的地區簡易獎助金
- 更有能力吸收及保留新社員...總之，成功是會傳染的!

成功對於你有什麼樣的意義：

- 個人感到滿足，知道你是個有影響力的人
- 持久的影響能力，有益於貴地區與那些需要幫助的人

■ 您在教練手冊裡可以找到的：

- #1 幫助扶輪社設定目標的建議... 第 4 頁
- #2 依照進度表做的秘訣... 第 6 頁
- #3 建立 EREY 團隊的計畫... 第 8 頁
- #4 EREY 團隊的角色與責任... 第 11 頁
- #5 有特色的計畫... 第 14 頁
- #6 支持您團隊的扶輪義工及扶輪基金會職員... 第 18 頁
- #7 與有挑戰性扶輪社工作 — 大型扶輪社及小型扶輪社... 第 22 頁
- #8 於扶輪社發表演說的秘訣... 第 25 頁
- #9 為鉅額捐獻，保羅·哈理斯之友協會... 設定步驟的想法... 第 29 頁
- #10 了解永久基金的基本辭彙... 第 31 頁
- #11 線上服務，報告和扶輪基金會--直接的捐獻(適用於那裡)... 第 32 頁
- #12 資源--- EREY 出版品，PowerPoint 介紹，成功的募款策略和每週扶輪思索... 第 38 頁

■ 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
- #5 Identity projects ... page 14
- #6 Information about your support team of volunteers and TRF staff ... page 18
- #7 Strategies for working with challenging clubs — large and small... page 22
- #8 Useful tips for making a club presentation ... page 25
- #9 Ideas for setting the stage for major gifts —the Paul Harris Society ...page 29
- #10 Basic vocabulary for understanding the Permanent Fund ... page 31
- #11 Online services, reports, and TRF-DIRECT contributions (where applicable) ... page 32
- #12 Resources — EREY publications, PowerPoint presentations, Fundraising Success Strategies, and Weekly Foundation Thoughts ... page 38



教練秘訣 Coach's Tip

為你的地區訂製教練手冊 Customize The Coach's Playbook for your district.

1 目標設定

Set Goals

每年，各扶輪社設定目標來衡量達成國際扶輪基金會總募款目標的進度。每位扶輪社的社長當選人被要求再五月初以前提交扶輪社目標報告書給他或她的地區，即將任職的地區總監當選人(DGE)。然後，地區總監當選人(DGE)應將扶輪社目標報告書在國際扶輪世界年會宣佈目標之前寄交國際扶輪基金會。

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.



目標設定的步驟是什麼？



What is the goal-setting process?



我怎樣幫助扶輪社設定目標？



How can I help clubs with goal setting?



為什麼目標設定是很重要的？



Why is goal setting important?

目標設定是為你的地區辨認及發展未來的領導人的一件極好的工具。這是需要由您與扶輪社的社長關於整年的扶輪基金教育，社友參加計劃，及募款等事情做一次溝通對話開始。這也是開始培訓能力強的扶輪社社長將來被地區指派的機會。

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.

每位社長應該鼓勵達成每人平均最少 100 美元的年度計畫基金捐款目標，或者估計與去年捐獻相比增加百分之 10-15 的捐獻，或者達成百分之百的社員參與。

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.

除了設定一個年度計畫基金捐款目標之外，扶輪社的社長也被要求設定一個永久基金的捐款目標 — 增加捐助者和遺贈協會會員的人數。

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.

你和你的「每位扶輪社員，每年」的 EREY 團隊幫助扶輪社友許多方式。

You and your EREY team can help clubs in a number of ways.

這裡有一些訊息適合你的扶輪社獲得成功之路

Here are some tips for getting your clubs on track for success:

- 研究該扶輪社的捐獻以決定哪種方式的幫助。如果一個扶輪社缺乏一個募款計畫，與它的社長或理事會合作發展出一個募款的策略。
- 考慮建立一個「夥伴體系」使擅長募款的扶輪社與困難的扶輪社搭配，並且鼓勵合作與意見分享。
- 徵求演講者以幫助扶輪社的社員更能了解扶輪基金會計畫的價值。
- 定期與扶輪社保聯繫以提供行動的支持。

- 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.



教練秘訣 Coach's Tip

目標為你的團隊提供一致的目的。Goals provide a unifying purpose for your team. 目標設定的過程能幫助辨認未來的領導人。The goal-setting process can help identify future district leaders.

#2 按照時間表

Stick to a Schedule

正如你學習的，在新的扶輪年度之前的那些月份數有很多事情要產生。預先討論需求和期限，將降會降低規劃大型活動與達到目標的壓力。雖然正式的服務是從7月1日才開始，但現在是成立你團隊的時候，說明責任的概要，並開始發展一個策略。請你的社長當選人在社長當選人研習會 PETS 時提交他們的基金發展目標。在那之前，EREY 團隊的領導人需要與社長當選人聯繫指導他們整個目標設定的步驟。

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.



現在我該做什麼？



What should I be doing now?



現在我該要求他人做什麼？



What should I be asking others to do now?

■ 一些重要的日期你要記住：

1月： 確認人選填補 EREY 團隊的重要扶輪基金義工的職務，及第一次會議的時間表。

2月： 國際講習會之後，參加地區團隊訓練會。討論並且分發基金發展扶輪社目標報告書。

3月和4月： 鼓勵參加社長當選人研習會 PETS 並幫助收集整理社長當選人的目標報告書。

3月-6月： 提出一份暫定的扶輪社公式訪問時間表給社長當選人以保有一次成功的訪問。建立一組與扶輪社社長及委員會主委聯繫訊息分發電子郵件的目錄。

3月-4月： 開始計畫和挑選在7月到11月之間舉行的扶輪基金研習會日期。參加地區講習會議且考慮與助理總監和 EREY 團隊舉行策略會議。

4月-5月： 百分之百的把扶輪社目標報告書提交到扶輪基金會 TRF。

6月： 與前任的總監和領導團隊合作保證平穩的轉移：檢核扶輪社的捐獻趨勢，可能成為巨額捐贈的人，和未完成的地區計畫案。

7月1日： 帶頭示範。你和你的 EREY 團隊組員應該將你的每年捐款，捐給年度計畫基金。記得在你的扶輪社公式訪問時分享 EREY 訊息。

7月-11月： 舉辦扶輪基金研習會。

9月30日： 達成你的年度計畫基金捐獻目標的百分之25 — 扶輪社已寄送他們對於扶輪基金會的捐獻。

■ 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.

10月：在地區確認和把握至少一位巨額捐贈的人的艱巨任務。

11月(扶輪基金月)：有效推動扶輪基金會的計畫和財務支持「每位扶輪社員，每年」的 EREY 的重要，推廣一切可得到禮物捐獻的挑戰機會，扶輪基金會--直接 TRF-DIRECT，扶輪基金會的贊助會員計畫，保羅·哈里斯協會，捐助者計畫和遺贈會。

12月31日：達成你的年度計畫基金捐獻目標的百分之50—扶輪社已寄送他們對於扶輪基金會的捐獻。

3月31日：達成你的年度計畫基金捐獻目標的百分之75—扶輪社已寄送他們對於扶輪基金會的捐獻。

6月30日：達成你的年度計畫基金捐獻目標的百分之100—扶輪社已寄送他們對於扶輪基金會的捐獻。

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.

忘記了您的捐獻將寄交何處？

地址是：The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL 60693, 或聯絡您地區的國際扶輪辦公室。

加拿大扶輪基金會是：The Rotary Foundation (Canada) Box B9322, PO Box 9100, Postal Station F, Toronto, ON M4Y 3A5

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



教練秘訣 Coach's Tip

時間就是一切！

Timing is everything!

#3 「每位扶輪社員，每年」團隊 The EREY Team

一個有效的「每位扶輪社員，每年」的 EREY 團隊的工作是具有挑戰性的，但是擁有堅強的團隊，可享受工作之樂，管理容易，敢說那些工作是，有趣的。

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.

✓ EREY 團隊應該有多少人？

✓ How many people should be on the EREY team?

✓ 誰應該在你的團隊？

✓ Who should be on your team?

成功的前地區總監 (PDGs) 和地區扶輪基金委員會主委 (DRFCCs) 告訴我們，他們嘗試大約有 10 人在他們的 EREY 團隊。地區總監可以告訴他們的地區扶輪基金委員會主委 (DRFCCs) 管理地區 EREY 的工作，與年度計畫基金捐獻小組委員會主委一起分擔領導。請看第 5 頁的組織表，可基本的理解你的 EREY 團隊的主要成員。

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 5 for a basic understanding of key players on your EREY team.

很多地區總監選擇保持相當大的團員數量，因此讓每位義工可感受到其工作量是容易管理的。平均，每位 EREY 團員將監督並且支持 4 到 6 個扶輪社的工作。扶輪社應該任命他們自己的扶輪基金主委/委員會。

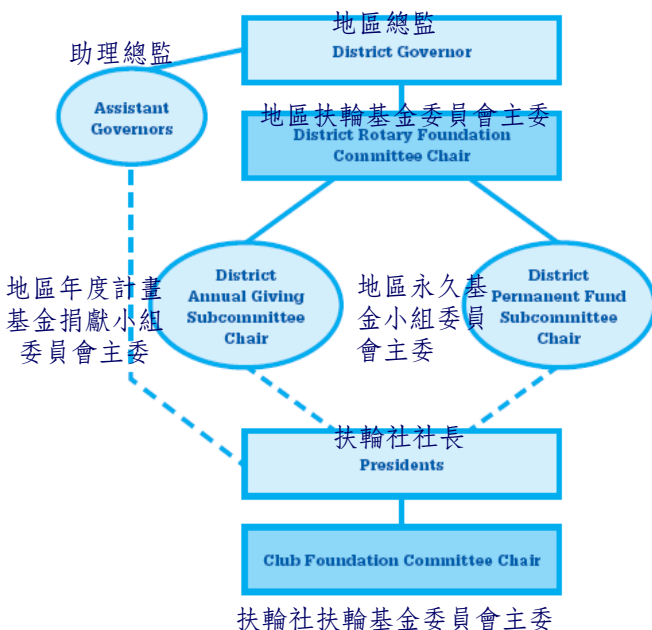
Many DGs choose to keep the number of team members fairly large so that each volunteer feels the workload is manageable. On average, each EREY team member will oversee and support the efforts of four to six clubs. Clubs should appoint their own Rotary Foundation chair/committee.

團隊的核心組成應該包括上述重要義工的職位，有一些地區已經選擇運用前地區總監，積極進取的地區領導人，和對於扶輪基金會有熱忱且願意擔任工作的其他任何人。地理區位較大的地區應該嘗試運用來自不同的區域的領導人。

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.

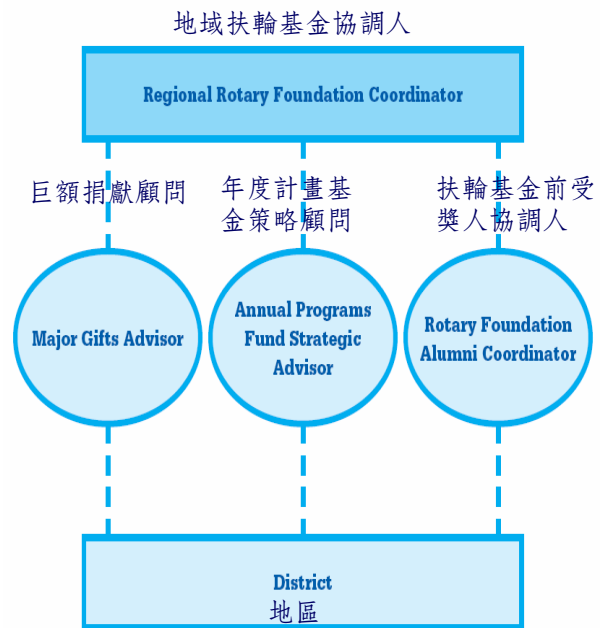
扶輪基金組織表(為募款)

Rotary Foundation Organizational Chart (for fundraising)



地帶支持團隊

Zone Support Team



教練秘訣 Coach's Tip

別嘗試做獨夫—要讓別人參與。Don't try to be a one-person team — get others involved.

#4 角色和責任

Roles and Responsibilities

EREY 團隊的工作是重大的。在這一年度開始之前幾個月，EREY 團隊應該與繼任的扶輪社社長聯繫：

- 建立一種支持的關係。
- 概述這一年地區的重要任務。
- 確保交付主要的 EREY 教材包括扶輪社成功要訣工具袋和目標設定報告書。
- 了解那些扶輪社的歷史和社員的組成結構。
- 支持和幫助規劃扶輪基金的募款活動。

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.

✓ 有一個 EREY 團隊的職務說明嗎？

✓ Is there a job description for an EREY team?

✓ 有什麼樣的期望？

✓ What are the expectations?

✓ 什麼時候開始他們的任務？

✓ When do they begin their assignments?

EREY 團隊將被要求去教育、激勵、培養，並且“告知”：

- 幫助扶輪社進行目標設定
- 確保每一社有一位扶輪基金主委
- 透過扶輪基金會的發表，教育扶輪社
- 鼓勵扶輪社成為 100% 的扶輪基金會贊助會員社和 EREY 扶輪社
- 激勵並激發扶輪社超越過去的成就
- 作為地區與扶輪社之間的聯繫，對於扶輪基金會的溝通
- 提供幫助募款困難的扶輪社
- 與扶輪社領導人合作確定扶輪基金會巨額捐獻的期望

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

作為一名教練，對於你的 EREY 團隊你有一定程度的期待。要求每位組員個人捐贈美金 100 元或更多到 EREY 努力的成果。他們應該要求扶輪社領導人(社長、扶輪基金委主委、財務、秘書、糾察)做相同的事。每位 EREY 團員應該每個月針對目標追蹤他或她的扶輪社的成就，挑戰和發展。這裡有一種方法可追蹤：

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

等級 Rating	扶輪社 Club	目標 Goal	捐款日期 Gift to Date	備註 Notes
1	Ashland	\$6,000	\$6,000	100%直接網路捐款 100%TRF-DIRECT
1	Belmont	\$3,500	\$350	一月舉行大型募款活動 Big fundraiser in Jan
4	Damen	\$3,000	\$0	缺少計畫/需要協助 Lacks plan/needs help
3	Edgeton	\$2,000	\$300	募款困難 Struggling with effort
2	Frankfurt	\$18,000	\$6,000	大型扶輪社與理事會 Big club-meet w/board

■ 等級範本：Sample ratings:

1 = 領導者 Leader

2 = 挑戰者(高於地區平均) Challenger (above district average)

3 = 在半途(在地區平均之下，需要支持) On the way (below district average, needs support)

4 = 需幫忙！(有極大的挑戰，需要注意) Help! (has significant challenges, needs attention)

■ 確保扶輪社的成功使用下列檢核表當指南：

- 完成社的目標報告
- 挑選扶輪社基金主委
- 組織社的募款委員會
- 訓練社的領導人
- 保證社的領導人已發誓/捐獻
- 教育新的以及現有的社員
- 激勵社員
- 向每位社員個別“要求”捐獻
- 找出有希望成為保羅·哈理斯協會及巨額捐獻的人士

■ 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.



教練秘訣 Coach's Tip

要確實讓團隊每一份子了解他或她的角色。

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

#5 發展一項特定的計畫

Developing an Identity Project

很多地區已經有最成功的年度計畫基金捐獻的募款，首先參加一些好的計畫以幫助“面對”認識扶輪基金會並鼓勵社員捐獻。一項特定的計畫是指你的社員(以及大多數的社區)都能容易的與扶輪社和地區聯繫的一項計畫。

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.



我怎樣能發展一項特定的扶輪基金會計畫？



How can I develop a TRF identity project?



我怎樣確保繼續為年度計畫基金捐獻的分享制度提供捐獻？



How do I ensure continued funding for APF-SHARE ?

範例 1

我們地區的扶輪社員真的被一項關於乾淨水的配合獎助金計畫，如何在海地“停止孩子死亡”的故事所鼓舞，地區領導人決定當社員捐獻給年度計畫基金的錢超過地區的目標時，那年任何所增加的基金捐獻(日後透過分享制度重新分發)將被指定於支持未來乾淨水的配合獎助金計畫。現在我們的地區的扶輪社員對於年度計畫基金的看待等於完成我們好的乾淨的水計畫。

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.

範例 2

為了設定並達成年度計畫基金捐獻目標，我們的地區設定計畫方案目標。我們每年召開全地區會議，幫助確定哪個扶輪基金計畫是我們未來想要支持的。我們評估在未來3到4年裡，有多少的DDF可使用，然後提出我們需要從社員和扶輪社那裡增加多少基金，來支持計畫。包括社員和扶輪社的參與，我們也成功的擴展很多的巨額捐獻至年度計畫基金。

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.

範例 3

對我們的扶輪社來說不需要增加一項扶輪基金會捐獻到他們應付款發票內，我們喜歡扶輪基金會一直接捐贈TRF-DIRECT (目前美國和加拿大可使用此項自動捐款計畫)。不管怎樣，過去我們並沒有太多的社員註冊登記，直到我們製作的小冊子將我們一項地區計畫的照片刊登在封面上。非常快速的，人們為了這項計畫把他們的款項捐給年度計畫基金，並且我們能讓更多的人註冊登記。

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.

考慮以下的一些內容：

- #1 集中於扶輪的工作重點：識字教育、水資源管理、健康和飢餓、以及扶輪家庭，確定怎樣將這些領域的計畫案與扶輪基金會搭配，對你的會員有最好的吸引力。
- #2 告訴你的會員參加國際的扶輪基金會計畫案，並說他們的故事。
- #3 與另一個他們的社員已受到工作鼓舞的地區合作。
- #4 得到第一手的經驗。
 - 採用志願者服務，從你的地區派出一組由扶輪社友組成的團隊訪問配合獎助金計畫的地點，或拜訪一些世界上需要協助的地方。他們將帶回非常真實的計劃或當地的需要，和協助募款的熱情來滿足那些需求。
 - 加入一個到開發中國家的團體研究交換團 — 並鼓勵你前往外國的團隊，去發現一項能發展成為地區特色的扶輪基金會計畫案。
 - 選擇一個對前往開發中國家感興趣的大使獎學金學生，然後鼓勵那位學生在國外時，幫助地區確定一件配合獎助金計畫案。

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.

舉例透過年度計畫基金/分享制度(APF-SHARE)來支持所找出的計畫：

一旦對一項特定的計畫產生一種情感，它會引起扶輪社員直接貢獻該計畫。扶輪社員希望支持各種值得贊助的慈善計畫 — 但只要能確認補足了他們的工作就好，而不與扶輪社或地區所支持的扶輪基金會計畫競爭。透過年度計畫基金工作的好處是：

- 確保地區對於所有的計劃繼續募款。支持找出來的計畫而沒有增加基金到您的“DDF 銀行帳號”而傷害到未來所支持的團體研究交換、大使獎學金、配合獎助金計劃等的工作。扶輪社友的興趣總是隨著時間改變，因此很重要是須要有可用的資金，供尚未決定的計劃使用。
- 鼓勵你的最好的扶輪義工和捐獻人，為強化扶輪基金會請投入他們的時間、才能和資源。扶輪有獨特的見解影響他的扶輪社員與義工，讓我們確保我們的活力是用來擴張扶輪的影響力，以及在全世界行善的能力。
- 確保保羅·哈里斯之友的捐獻人取得他們應有的表彰。經常，扶輪社員有時想他們為了一項國際扶輪社的計畫案，寫了一張支票給扶輪基金會，但獲悉他們的捐獻並

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

不適用保羅·哈里斯之友的表彰時感到失望。扶輪社員可藉由捐獻給年度計畫基金的捐款，可獲得表彰點數，而達到扶輪基金會贊助會員、多次捐獻保羅·哈里斯之友、保羅·哈里斯協會會員，和鉅額捐獻的表彰。

- 正確的管理你的地區資金。年度計畫基金一分享制度建立一個堅強的架構，且設立正確的管理與控制。
- 有強大的國際形象對扶輪有好處。想像我們與小兒麻痺奮鬥的限制——花費我們很長的時間超過一代的一項挑戰——假如扶輪社選擇撲滅小的火災而不是一起工作。從長遠來看，當我們透過扶輪基金會共同的力量時，我們會更有效能。
- 在需要和興趣為基礎之上，確保一種公平的分配。年度計畫基金是透過 DDF 提供資金，從您自己的扶輪社到全世界的各扶輪社的槓桿捐助，這筆資金是極緊要的，它是繼續提供未來的服務構想的根源。

雖然它需要等待一段長的時間，這 3 年的分享循環制度也提供了高水準的品質管理(基金的管理) 和慈善捐助的影響(最值得注意的事件是得到適度的資金)。

對於特別的需求，怎樣幫助作出快速的回應：

- 每年有數百萬美元的 DDF 沒有用完。考慮使用這些資金用於地區感興趣的，如短期的災難恢復計劃、根除小兒麻痺等的夥伴計畫，和提供低收入國家的國家的大使獎學金學生等作出回應。
- 雖然是從年度計畫基金分出來，扶輪基金會的捐贈人基金建議，提供了一種慈善機能，給扶輪社友能更迅速的對於大規模的災難的救護方案。若需更多的細節，請上 www.rotary.org 網站。

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.



教練秘訣 Coach's Tip

鼓勵社員參與扶輪基金會計畫案。

Encourage members to get involved in TRF projects.

6 你的支持團隊

Your Support Team

扶輪基金會已經發展出一套義工架構來支持你的工作。另外，扶輪基金會的職員是獻身為你效勞的。

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

✓ 那些義工是誰？他們的工作是什麼？

✓ Who are the volunteers and what are their jobs?

✓ 我如何能好好運用他們？

✓ How do I best use them?

地域扶輪基金協調人

地域扶輪基金協調人是負責推展該地區所有的計畫和為扶輪基金會募款。地域扶輪基金協調人被期望去訓練地帶和地區領導人，並且監督他們被指派地區的地區團隊設定與達成募款目標。地域扶輪基金協調人可被邀請在盛大的集會上演講，協助大型扶輪社的理事會，並且與潛在的或現有的巨額捐獻人會面。他們直接與年度計畫基金策略顧問、巨額捐獻顧問合作支持你的工作。

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.

年度計畫基金策略顧問

年度計畫基金策略顧問(SAs)是監督與支持一組地區推展「每位扶輪社員，每年」募款的義工。通常，年度計畫基金策略顧問是由熟悉日常挑戰的前總監擔任。年度計畫基金策略顧問可以被邀請協助地區的扶輪基金研習會，訓練地區領導人有關於年度計畫基金捐獻，並在各社介紹「每位扶輪社員，每年」計畫，幫助需要支持的扶輪社，追蹤地區的進度，作為地區與地域扶輪基金協調人之間重要的聯繫，和協助設立與達成年度計畫基金捐獻的挑戰。

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.

巨額捐獻顧問

巨額捐獻顧問是監督與支持籌募巨額捐獻至扶輪基金會的義工，這些捐款或是捐給年度計畫基金或是捐給永久基金，與年度計畫基金策略顧問一樣，他們通常是地區前總監。他們的主要重點是在**找尋、培養、並懇請**巨額捐獻。巨額捐獻顧問可以被邀請至地區扶輪基金研習會演講，和支持地區增加遺贈會會員的目標努力，並在各社介紹及訓練地區領導人關於巨額捐獻的工作。

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.

基金會前受獎人協調人

基金會前受獎人協調人(RFACs)的角色在於確保扶輪社與

Rotary Foundation Alumni Coordinators

The goal of Rotary Foundation alumni coordinators (RFACs) is

地區認識基金會前受獎人與扶輪是一體的，並推展扶輪社考慮將基金會前受獎人當作扶輪社的潛在社友且有可能捐款給扶輪基金會，並將前受獎人當成有效提倡基金會各項計畫的人。

地區扶輪基金主委

地區扶輪基金主委(DRFCC)是幫助地區總監並與地區扶輪基金委員會合作協調地區的基金活動，促進與支持扶輪基金會贊助會員計畫，確保有效的地區扶輪基金研習會。地區扶輪基金主委也提供策略幫助扶輪社實現年度計畫基金捐獻的目標和**找尋、培養、並懇請**有能力的巨額捐獻人。

年度計畫基金捐獻小組委員會主委

年度計畫基金捐獻小組委員會主委(AGSC)協助地區總監、助理總監、地區扶輪基金主委、和扶輪社社長達成平均每人最少捐獻美金 100 元的目標；積極在地區和扶輪社推展扶輪基金會贊助會員計畫；訪問與監督未捐獻至扶輪基金會的社和地區的募款計畫；協助尋找並懇請有能力的巨額捐獻人的捐獻挑戰；並與助理總監分享捐款報告訊息。

地區永久基金主委

地區永久基金主委(DPFSC)協助地區總監、助理總監、地區扶輪基金主委、和扶輪社社長達成永久基金捐獻目標；積極提升捐助者和遺贈會計畫；籌組巨額捐獻討論會；並且幫助培養並追蹤當今和未來的可能巨額捐獻人。

扶輪社扶輪基金主委

在許多場合，扶輪社扶輪基金主委負責推展社內的扶輪基金，並幫助建立社的每周計畫。扶輪社扶輪基金主委應該被認為是扶輪社的一種主要資源。

除了上面列舉的職位外，其他的地區領導人也能幫助強化地區。請確認包括獎學金小組委員會、團體研究交換(GSE)小組委員會、獎助金小組委員會、前受獎人小組委員會。他們能幫助扶輪社推展扶輪基金會計畫，增加對扶輪基金會的全面支持，並且在吸引新社員上起重要的作用。

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, DRRFC, 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.

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.

扶輪基金會職員

年度計畫捐獻職員

負責幫助扶輪社和地區的職員達成他們的年度計畫捐獻目標，包括：

TRF Staff

Annual Giving Officer

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

- 謀求捐獻至年度計畫基金和巨額捐獻
- 參加地區的扶輪基金研習會和其他的扶輪會議
- 與地區和地帶的領導人密切合作，發展已清楚定義的基金發展策略

巨額捐獻職員

與扶輪義工合作找尋，培養，並懇請有希望的個人巨額捐獻，這些職責包括：

- 保有一份可能成為巨額捐獻人的文件，以及培養和徵求捐贈 50,000 美元或更多的捐獻
- 當進行審核資格條件、培養的和管理工作訪問時，要與可能的巨額捐獻的候選人見面
- 旅行參加地區、多地區和其他的扶輪會議並與義工的委員會一起合作來發展事務

發展服務協調人

擔任作為扶輪基金會與扶輪社，以及捐獻人之間的聯絡，包括的職責有：

- 保持捐贈人的準確記錄
- 幫助保羅·哈理斯之友的表彰的索取
- 支持扶輪社達成他們的工作目標

永久基金捐獻人/遺贈協會/巨額捐贈人協調人

負責管理永久基金捐獻人、遺贈協會、巨額捐贈人表彰，包括：

- 製作永久基金捐獻人、遺贈協會、巨額捐贈人的報告
- 確認已送出正確的表彰
- 保持捐獻人的準確記錄

扶輪基金會聯繫中心

目前正服務北美洲，聯繫中心的設計，是對有關扶輪基金會的問題作出迅速回應，並且處理捐贈人簡單的服務需要。電話號碼是 866-9Rotary (866-976-8279)。聯繫中心也能透過以電子郵件送達 contact.center@rotary.org。

- 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.



教練秘訣 Coach's Tip

請教專家提供建議。

Call on the experts for advice.

#7 與有挑戰性的扶輪社合作 Working with Challenging Clubs

每一個地區都會面臨具有挑戰的扶輪社。雖然這些扶輪社從少於 10 位的社友到有 800 位社友或更多的社友，但是他們的一些問題頗為相似。實際上，大型的或小型的扶輪社都可能會有他們自己感覺到的，有限的資源和社員下降等困難的感覺。

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.

✓ 我如何說服一個大型的扶輪社支持扶輪基金會，當他們有自己的基金時？

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

✓ 我怎樣能讓一個掙扎中的小型的扶輪社捐款給扶輪基金會？

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

這是探討大型的和小型的扶輪社的一些建議：

Here are some suggestions for approaching large and small clubs:

大型的扶輪社

Large clubs

大型的扶輪社通常有三種特性：(1)理事會 (2)他們自己的私人慈善基金和 (3)有時集中注意力於特定的社區計畫。這是向大型的扶輪社接洽，尋求支持的一些決定性的步驟

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:

- 做好你的事先工作：盡你所能研究越多關於該扶輪社歷史的訊息。
- 確認已經支持扶輪基金會且願意擔任地區與扶輪社之間聯絡的扶輪社社友。
- 爭取重要扶輪義工的支持：你的地域扶輪基金協調人、地區扶輪基金主委、年度計畫基金捐獻小組委員會主委、巨額捐獻顧問、年度計畫基金策略顧問、扶輪基金會前受獎人協調人、各社的扶輪基金主委。
- 在任何正式的扶輪社發表演說鼓勵配合之前，安排一次與扶輪社的理事或主要的扶輪義工見面。

- 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.

#1 告知扶輪社對於地區總的成功是多麼重要

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

#2 明確地解釋你希望在今天會議達成什麼目的：

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

— 在扶輪社例會時有更多的節目時間來教育社友關於扶輪基金會

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

— 規畫一些社友能定期贊助扶輪基金會

— More program time at club meetings to educate members about TRF

— 研究將來一起工作的模式

— Plan to have members contribute regularly to TRF

— Explore ways to work together in the future

#3 如果扶輪社已有它自己的基金，強調它對當地工作的

#3 If the club has its own foundation, highlight the importance of its work locally, but focus on the benefits of

重要性，但也請注意支持扶輪基金會的好處。解釋這兩個基金之間的關係並不是一種競爭而是一種合作的關係。指出捐獻的款項如何透過分享制度經由地區指定用途基金回到地區。

#4 提醒理事會越多的國際參與，會引導社員有更熱情的，並且可以促進他們社員的發展。

小型的扶輪社

募款或許是一個小型的扶輪社可能面對的幾個問題之一。該社可能正面臨社員老化，吸收新社員可能很難，並且該扶輪社缺乏主動性或動能。這樣的情形，是需要各種層級的支持。

這是向小型的扶輪社接洽，尋求支持的一些決定性的步驟：

- 找出關鍵的問題與障礙。
- 鼓勵扶輪社透過募款活動從事捐獻。
- 考慮與附近一個更健全的扶輪社合作，這能幫助彼此的募款工作和城市的計畫案。
- 為該扶輪社提供好的扶輪基金會的演講者。
- 與好的但非扶輪社友的演講來賓，分享想法。
- 為招募新社員分享想法。
- 定期保持聯繫以確保扶輪社與地區的領導人，其他的扶輪社，以及個別的社員等發展堅強的關係
- 注意該扶輪社的進展

小型的扶輪社經常擔心他們社員的狀況：太老、太年輕、缺乏資金、或完全不感興趣。通常這僅是因為扶輪社參與大的計畫而造成的抗拒和阻礙。鼓勵扶輪社承擔一些小的人道主義計畫並且注意結果：“太年輕的”成為好的工作者，“太老的”成為好的指導者和良師益友，“太無趣的”突然之間對扶輪變得熱情！

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.

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!



教練秘訣 Coach's Tip

找出挑戰與機會。

Identify challenges and opportunities.

#8 成功的發表演說

Presentations That Score

吸引你的聽眾並論及他們重要的問題，是成功發表的關鍵。

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

- ✓ 我該為發表演說做什麼樣的準備？
- ✓ 我怎樣能做一場引起興趣的發表演說？
- ✓ 地區總監對扶輪社的演講有什麼特別的秘訣嗎？

- ✓ 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?

■ 分享發表扶輪基金會的有用的秘訣

■ Useful tips to share for making Rotary Foundation Presentations Planning

計畫

提早開始！以下這些步驟將把你放在正確的途徑上，以確保您作為一位扶輪社的主講者：

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

- 在 7 月 1 日之前與扶輪社社長聯繫安排一天做有關於扶輪基金會的發表。並確定他們或者她們想要你傳遞的任何特別消息。
- 收集該扶輪社各項計畫的訊息。該扶輪社是否曾經受益於扶輪基金會的計畫，例如團體研究交換，配合獎助金，大使獎學金等？在要求他們增加對於扶輪基金會的支持之前，請確認你已經知道到該扶輪社的工作。
- 收集任何照片或幻燈片來添加一些視覺內容，將有助於你的演出。越有創造性越好。嘗試設計有創見的演出或使用扶輪基金會的 PowerPoint 的陳述來幫助你。

- 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.

發表演說的綱要

Presentation Elements

並非每個人對於公開演說都感到欣慰，但是每個人都有能力做好發表演說。這是一些建議：

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

介紹自己並感謝扶輪社社長及社友給你這一次機會談論有關扶輪金會的事。

Introduce yourself and thank the club president and members for giving you an opportunity to speak about TRF.

回顧四大服務並且強調第四項的國際服務。提示每位扶輪社友都應該對達成這四項服務目標負責。透過扶輪基金會，扶輪社社友能改變全世界人們的生活，增進他們的健康，幫助他們學習閱讀，並教導他們對於他人的容忍。

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.

感謝扶輪社過去的成就和透過配合獎助金計畫，團體研究交換，大使獎學金等計畫對於扶輪基金會的貢獻，此外更

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.

感謝該社是地區內最支持的扶輪社。提醒觀眾這些故事是我們的故事，扶輪基金會是我們的基金會。把個人經驗納入你的演說，對打動他人心弦不要猶豫不決。

在演說時請表揚現今的扶輪基金會贊助會員，如果當時他們沒有 EREY 贊助會員的表彰標籤(956)，請花費片刻以確保保證他們能得到一個表彰。

表示感激並授予保羅·哈理斯之友，巨金捐獻人和遺贈會的表彰。

在每次活動皆要表揚巨金捐獻人和保羅·哈理斯之友協會和遺贈協會的成員。

展示 10 分鐘的錄影或者以簡報來陳述。**每位扶輪社員，每年 DVD(978-MU)** 是一個很好使用的工具。

別忘記須“**完成交易**”，在演說時請確認你已要求他們捐獻，若當地能提供服務的話，請推展 TRF-DIRECT (自動直接捐款給扶輪基金會)。

發表演說的關鍵

- 演練你的講稿可使你更自在。
- 要有熱情！請不要只念筆記；將演講帶來活力！
- 要能激發！鼓舞扶輪社的社員成為熱中於支持扶輪基金會。當您完成演講時，他們應該感到更接近扶輪基金會。

地區總監發表演說的秘訣：

“我的第一次正式演講就像一台火車在慢動作下失事，我創立了一個最長時間，約 40 分鐘的記錄。但是，公平的說，它也產生出一些正面的回應。只有五位聽眾看起來像在熟睡，其他明顯的在打瞌睡——或點頭。為什麼要出席兩個扶輪社呢？還好，在我們說話時已進行刪除和重寫。下兩個禮拜還有九個扶輪社，阿耶！”

— 一位新手的地區總監

扶輪社的公式訪問經常是讓地區總監感到膽怯的任務。這裡有一些秘訣可以使公式訪問有效地，並產生好評的：

- 在 6 月下旬，個人親自打電話給扶輪社的社長當選人確認你的公式訪問日期。並利用這個機會：
 - 恭喜社長當選人即將擔任他或她的新任務。與他或她分享您擔任扶輪社社長時最美好的回憶。
 - 分享你今年對於地區的願景。提及一些事情譬如參與更多的計畫，增加扶輪社之間的聯誼，和共同一致為增加社員努力。特別是社長當選人如何能成為這樣願

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.

景的一部分。

- 為支持扶輪基金會埋下種子。提及你將在你的致詞中表揚社長當選人並強調他或她的領導能力。他或她是否願意捐贈第一筆小額捐款美金 100 元給扶輪基金會，讓此動能持續前進？
- 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?

在你發表演說時：

- 縮小你的焦點。通常我們嘗試要講得太多。即使你今年有 20 個目標，在你的演說時也只需強調一些。更重要的是，要使扶輪社的社員對於扶輪有好感。開始時介紹四個重點，然後在講話的主體中詳述每個問題的細節。(請猜測以什麼做總結)是以四點的摘要做總結。
- 增加幽默和熱情。反諷是好的，並且自我的陶侃是安全的並使你看來謙卑。小心使用笑話，因為他們可能會冒犯錯誤或者太陳舊了。用偉大的扶輪基金會的故事來表達熱情是容易的。記住短的故事會帶來更多的回響。
- 親身經歷。告訴他們關於你自己的見解總是好的。一些例子可能如你是怎樣得到你的綽號；你在扶輪社裡的最令人困窘的時刻；你真正成為扶輪社社友的第一天；或者你過去經常在每年的總監公式訪問時開溜。嘗試編造一些溫暖人心的故事，但並不是用你自己的見解來彰顯自己。相反地，告訴鼓舞人心的故事是怎樣真實的影響你的生命。

通常，我們與其太光鮮，不如真實的好。

記得我們僅僅是扶輪社社員，讓我們面對服務！

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!



教練秘訣 Coach's Tip

熟能生巧。

Practice makes perfect.

#9 為巨額捐獻設定步驟

Setting the Stage for Major Gifts

保羅·哈理斯協會(PHS)是一項特別的地區計畫，表彰每年捐獻 1,000 美元或更多金額給扶輪基金會年度計畫基金、根除小兒麻痺等疾病計畫、根除小兒麻痺等疾病夥伴計畫及人道獎助金計畫的扶輪社友和朋友們。

這項極好的計畫可以很容易被你的地區採用，我們建議你指定一個地區保羅·哈理斯協會(PHS)的協調人或主席，他和地區基金主委和年度計畫基金小組委員會主委合作。關於更多協會的訊息，請參考保羅·哈理斯協會小冊子(099)或與扶輪基金會人員聯繫 (erey@rotary.org)。

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).



有保羅·哈理斯協會對一個地區有怎樣的好處？



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



怎樣處理表彰？



How is recognition handled?

參加保羅·哈理斯協會經常是成為一位巨金捐獻人過程中的第一步。有能力的扶輪社友他希望支持年度計畫基金，成為地區未來的主要支持者。這協會

- 讓扶輪社友迅速取得巨金捐獻人的身份。
- 增加全地區對年度計畫基金的支持並為扶輪社和地區的計畫增加可使用的資金
- 建立扶輪社友和扶輪基金會 TRF 之間的一種發展關係
- 幫助地區開始建立一個預期的巨金捐獻人的目錄

保羅·哈理斯協會的成員可以作為保羅·哈理斯之友和巨金捐獻人表彰。請注意到這是地區所提供的協會表彰而非扶輪基金會 TRF，很多地區鼓勵使用 TRF - DIRECT 捐款，協助扶輪社友經由小額，定期的禮物並且更能有效地追蹤保羅·哈理斯協會成員。

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.

#10 永久基金

The Permanent Fund

對年度計畫基金捐獻提供了執行扶輪基金會 TRF 現行各項計畫的主要來源，捐給永久基金的捐款可確保扶輪基金會 TRF 有能力處理下一代世界的眾多需求。捐給永久基金的捐款是基金永久捐贈的一部分。這些捐款將由專業投資，並且每年只使用永久基金收益的一部分。

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.



捐到永久基金有那些方法？



What are ways to give to the Permanent Fund?



是否有一項永久基金的捐款目標嗎？



Is there a Permanent Fund goal?

支持永久基金

在遺囑或其他不動產計畫的捐贈；生活收入的捐贈(例如，剩餘的慈善信託、慈善年金、合夥收益等)；或者以不動產捐贈，現金，或其他資產等捐贈，都是支持永久基金的方法。有關於各種捐款工具的詳細資料請查看國際扶輪網站 www.rotary.org 的扶輪基金會 TRF 網頁。你也可和依照地理地域所指派的巨額捐獻與年度計畫基金捐獻職員聯繫。

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.

永久基金捐獻目標

在 2006 年 9 月，對於永久基金捐贈及承諾，扶輪基金會 (TRF) 已達成 億美元的初期里程碑。扶輪基金會的保管委員會已設立一個到 2025 年達成 10 億美元的目標，以協助確保將來扶輪基金會計畫的資金。這項目標是包含當今的資產與未來的承諾，且經由遺贈會與捐助者的表彰計劃。

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 線上服務

Online Services

科技已經使與 120 萬位扶輪社友的聯繫變得容易得多！現在希望每一位扶輪領導人都有一部電腦來接收電子郵件和上網。如果你還沒註冊上網使用扶輪事務的，現在就請透過國際扶輪網站 www.rotary.org 的 **社員入口** (Member Access) 進入。

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).



我怎樣追蹤地區的進度？



我怎樣追蹤扶輪社的成績？



從那裡我可以得到表格，小冊子和其他資料？



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?

■ 這是你上線能找到的一些迅速摘要：

可經由社員入口進入個人捐獻記錄和扶輪社與地區報告 (由於只限制一些會員可使用，請一定與你的 EREY 團隊分享這些報告。請看本頁上線的社員入口表格。)

在國際扶輪線上的目錄 (<http://shop.rotary.org/catalog>) 可購買全部出版品、錄影帶和其他資料，包括 EREY DVD 網站 (<http://erey.rotary.org>) 上有專門的一頁 EREY，從演講用的簡報到有關成功的 EREY 策略等都有這些有用的訊息 (www.rotary.org) 網站有關於扶輪基金會的捐獻表格、目標設定等

■ 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 this page.)

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
上線的社員入口表格

Online Member Access Grid

Update Membership Data
最新扶輪社社員資料
Update Club Data
最新扶輪社的扶輪基金會捐款資料
View Personal Contribution History
查看個人捐獻記錄
Pay Semiannual Dues
支付扶輪社半年的應付費用
Search Official Directory
尋找公式名錄
Manage E-mail Subscriptions
管理預定的 E-mail 網址
View Club Recognition Summary
查看扶輪社的表彰摘要
View Monthly Contribution Report
查看每月捐獻報告

	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 Official Directory	•	•		•	
Manage E-mail Subscriptions	•	•	•	•	•
View Club Recognition Summary	•	•	•	•	
View Monthly Contribution Report	•	•	•	•	

每月捐獻報告

每月捐獻報告通常在每月十五號左右可透過網站 www.rotary.org 的社員入口可以取得，(請看上一頁的社員入口權限。)

任何社員可以從國際扶輪網站查看地區每月的總捐獻報告 www.rotary.org/foundation/development/contribution.html。

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

■ 使用每月捐獻報告的訊息

- A** 年度計劃基金(APF)平均每人捐獻金額欄顯示該扶輪社社員捐款至年度計劃基金的平均每人捐獻，平均每人捐獻總計只包括非指定的年度捐款。
- B** 指定捐款是扶輪社捐承諾獻給特定的計畫，它包括根除小兒麻痺等疾病，配合獎助金及其他捐款。
- C** 永久基金捐獻是捐獻到永久基金的捐款，包括已實現的財產捐贈。
- D** 捐獻總數是指這一年的非指定年度捐款，指定捐款，和永久基金捐款的總和。

■ 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.

扶輪社表彰摘要

最新的詳細資料從國際扶輪網站 www.rotary.org 的社員入口可以取得(社員入口權限請看第 33 頁的表格)

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.	NAME	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				Jun-1986		
662048	Gallas, Edward	Y	\$7,600.00	15-Jul-06	15-Jul-05	PHF+3	Oct-1987	100	
*666977	Gordon, Andrea	N	\$1,600.00			PHF	Jun-1991		
666963	King, Brian	Y	\$7,000.00 +		01-Apr-06	PHF+8	Jun-2002	14,000.00	

使用扶輪社表彰摘要報告的訣竅

- A 表彰總點數的欄目是指結合現金捐款或接受到的扶輪基金會表彰的點數，表彰點數只可計入保羅·哈理斯之友的表彰，不能計入保羅·哈理斯協會會員和巨額捐獻的表彰
- B 取得贊助會員的日期——在今年的扶輪年度欄裡，顯示該扶輪社員累積捐獻紀錄金額達到或超過 100 美元時的日期，這是追蹤你扶輪社參與 EREY 的一項重要的工具。
- C 現在保羅·哈理斯之友等級的欄目顯示保羅·哈理斯之友表彰獲獎的情形。
- D 扶輪社友或扶輪社可以將他的扶輪基金會表彰點數移轉給其他扶輪社友或個人，這些額外的點數可以增加捐獻的挑戰及增加參與 EREY 計畫並取得百分之百保羅·哈理斯之友社的身份。

其他有用的扶輪基金會報告

下列報告可為你的地區提供詳細的訊息：

巨金捐獻人，永久基金捐獻人和遺贈協會報告

從你的扶輪基金會發展服務協調人函索即寄。

地區簡況

展示過去 5 年地區的扶輪基金捐獻及計畫活動的紀錄，並且有那一年度及全部的保羅·哈理斯之友、巨金捐獻人及遺贈協會會員的總數。此項資料函索即寄。

有效地使用報告的秘訣

- 在訪問每個扶輪社之前，檢查扶輪社的表彰摘要及每月捐獻報告以估計 EREY 活動計劃。並確定是否需要鼎力協助該扶輪社的募款工作。
- 感謝扶輪社的巨金捐獻人和遺贈協會會員。表彰他們對扶輪基金會計畫的影響並且發展他們與扶輪基金會的關係。
- 發展他們與與多次捐獻保羅·哈理斯之友和保羅·哈理斯協會成員的關係。
- 解釋扶輪社員的有效扶輪基金會表彰點數，如何搭配表彰點數增加年度捐獻。
- 恭喜該扶輪社過去的成就，並且鼓舞社員邁向更高的成就！

TRF 直接 (目前可供美國和加拿大利用)

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)

直接-扶輪基金會(TRF-DIRECT) 保證使你和扶輪社的財務主管更容易過日子。

扶輪基金會—直接捐款計劃(TRF-DIRECT)，允許捐贈人自動從他們支票帳戶(加拿大的支票帳戶)，儲蓄帳戶或信用卡(里程數，里程數，里程數!) 劃撥現款經由電子轉帳到扶輪基金會。針對要便利捐獻過程和節省成本，這些計畫允許捐贈人預先指定捐贈給年度計劃基金的總計並以(每月一次、每季、或每年) 等規則為基礎。

(記得要閱讀細部條款：每月的 10 美元或每季 25 美元從支票帳戶/儲蓄帳戶；每筆 25 美元的信用卡交易.)

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.)

這裡是我們的建議：

- 登記加入扶輪基金會—直接捐款計劃(TRF-DIRECT)，因此你便能看出它多麼容易。
- 鼓勵扶輪社社長和地區 EREY 團隊做相同的事。
- 鼓勵將扶輪基金會—直接捐款計劃(TRF-DIRECT)與你地區的保羅·哈里斯協會計畫結合。
- 在扶輪基金研討會時推動扶輪基金會—直接捐款計劃(TRF-DIRECT) 並使用自動扣帳的人們的第一手證明書。
- 宣導這個字：扶輪基金會直接捐款計劃(TRF-DIRECT)是扶輪社最容易達成 100%扶輪基金會贊助會員社的方法，取得 EREY 扶輪社的身分，並且達成扶輪社年度計劃基金捐獻的目標。
- 務必使地區立即開始捐獻！

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 資源

Resources

在有很多資源可幫助你，你的地區和你的扶輪社，達到充分參與每位扶輪社員，每年的計劃，這包括：

每位扶輪社員，每年(EREY)成功工具袋 (958) — 9 種語言發行

每位扶輪社員，每年(EREY)小冊子(957) — 9 種語言發行

保羅·哈理斯協會小冊子(099) — 9 種語言發行

EREY 扶輪基金會贊助會員徽章貼紙(956)

扶輪基金會—直接捐款計劃小冊子(998-EN-CND, 供加拿大使用; 998-EN-US, 供美國使用)

每位扶輪社員，每年(EREY) 海報— 9 種語言發行

每位扶輪社員，每年(EREY) DVD (978) —9 種語言發行

每位扶輪社員，每年(EREY)電子季刊—9 種語言發行

訂閱出版品請與扶輪分配中心聯繫。從國際扶輪網站預訂，請按“Shop”查看出版品和視聽資料，國際扶輪出版品服務中心可提供預訂服務。你也能與出版品服務中心電話聯繫：847-866-4600；傳真：847-866-3276；或電子郵件：pbos@rotary.org。

在國際扶輪網站上的附加資源包括：

每位扶輪社員，每年(EREY) 演講簡報

募款的成功策略

每週扶輪基金思索

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

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Additional resources on the RI Web site include:

EREY PowerPoint presentations

Fundraising Success Strategies

Weekly Foundation Thoughts

✓ 請去 www.rotary.org 網站或直接到 EREY 網頁：
<http://erey.rotary.org>。幾乎可找到所有的資料。

✓ 在你介紹扶輪基金會時請一定採用這些資源，需額外的協助請與扶輪基金會人員聯繫。

✓ 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.

在前我們正式鳴笛出發開始你的年度時有一項提示 — 您的領導將是最主要的關鍵。我們有信心你能做到！雖然，我們不能完全準備好讓你面對未來的這一年，但我們希望你感受到更多的知識並且對於你在每位扶輪社員，每年(EREY)任務的成就感到激動 — 現在您已讀完教練手冊。

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.

基金發展出版品

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