

## The Rotary Foundation – Annual Fund Goals

### Getting Ready to go online to enter your goals

The chart below has the blanks you will be filling in when you log in to rotary.org to fill in your Foundation Giving Goals. **The form doesn't look like the screen you will face, but it is designed to show you all the blanks you will face, give you some insight into how to fill them out, and give you time to go back to your club (before PETS) and seek help from your Past Presidents, your Treasurer, your Secretary, and your most knowledgeable members.**

The Foundation Goals website is much simpler than recent years.

**Annual Fund: (Note: One-half of all donations to the Annual Fund return to District 6510 in three years, to be used for District Grants and Global Grants.)**

The **'Gold Standard'** for giving to the Annual Fund is an **average of \$100 per person** in your club. Has your club been able to reach that level in the past?

Good News: you can look at a graph of recent history for your club. That, plus a visit with your club leadership, should help you decide what your Goal will be.

The only question: What will be your club's total giving to the Annual Fund?

Click the 'Pencil Edit' button to fill in your Goal in the blank. Then click the Save button.

**Polio Plus: (These donations are used specifically to Eradicate Polio completely. Currently, donations we make are matched '2 for 1' by the Gates Foundation.)**

The only question: What will be your club's total giving to Polio Plus?

**Click the 'Pencil Edit' button to fill in your Goal in the blank. The click the Save Button.**

### Major Gifts and Endowment Fund

Do you expect any of your members to make a Major Gift? Or a donation to the Endowment Fund?

**Click the 'Pencil Edit' button, and fill in the blanks, even if they are 0.**

**Go to the next page to help you get online and start entering your Club Goals.**

Go to [rotary.org](http://rotary.org) and **log in**.

On the main screen (**after you are logged in**), glide down the left side of the screen, below My Club Goals, to the button that says View Goals:

17-May-1926  
**CLUB PRESIDENT**  
Mrs. Jane G. Bonaldi  
**CLUB GOALS SET: 8%**  
**CLUB GOALS ACHIEVED: 50%**  
**SERVICE GOALS SET: 50%**  
**SERVICE GOALS ACHIEVED: 33%**  
**FOUNDATION GIVING GOALS SET: 100%**  
**FOUNDATION GIVING GOALS ACHIEVED: 38%**  
**ROTARY CLUB CENTRAL**  
**VIEW GOALS**

International Assembly.  
The 2015 Rotary Convention in São Paulo runs **Saturday, 6 June, through Tuesday, 9 June**. Remember to update your websites, newsletters, and calendars with these new dates.  
[Find the latest website updates](#), including improvements and issues we're working to resolve.

Click the View Goals button. You will see 3 TABS:

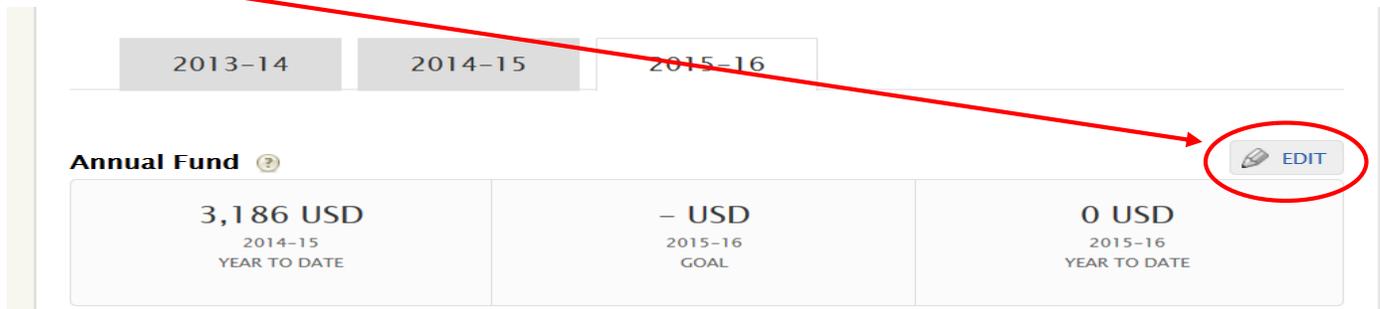
Rotary Club Central  
Welcome Lanis Lenker  
Club View  
District 6510 | Club Lebanon  
Your Club | Service | **Foundation Giving**

Click the **Foundation Giving** TAB.

Scroll down past the history to this section and click the TAB for **next year**:

**Goals and Progress**  
Current, incoming, and immediate past club leaders can click "Edit" to set goals and achievements. All club members can click "View" to see goal details.  
Select the year you want to edit or view.  
2013-14 | 2014-15 | **2015-16**

This is where you will find the Giving blanks. You have one more click to get into the system. You must tell it that you want to **Edit** the system for next year.



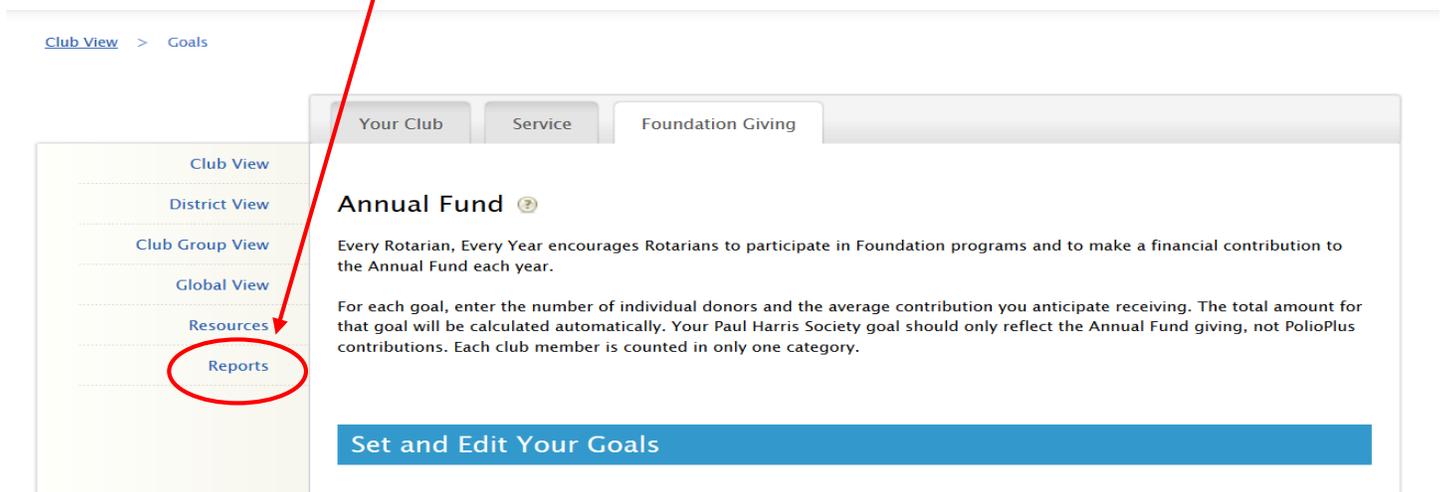
The screenshot shows a navigation bar with three year tabs: 2013-14, 2014-15, and 2015-16. Below the tabs, the text "Annual Fund" is followed by a help icon. Underneath, there are three summary boxes: "3,186 USD 2014-15 YEAR TO DATE", "- USD 2015-16 GOAL", and "0 USD 2015-16 YEAR TO DATE". A red circle highlights an "EDIT" button with a pencil icon in the top right corner. A red arrow points from the word "Edit" in the first paragraph to this button.

You are now ready to click into each blank and fill in your estimates.

At the bottom of the screen, be sure to click the **SAVE** button.

## Reports? What Reports??

You can find some helpful information in a couple of the reports on the system. While you are in this section of the website, take a look at the **Reports** button:



The screenshot shows a navigation menu with "Club View" and "Goals". Below "Goals", there are tabs for "Your Club", "Service", and "Foundation Giving". A sidebar menu on the left lists "Club View", "District View", "Club Group View", "Global View", "Resources", and "Reports". The "Reports" item is circled in red. A red arrow points from the word "Reports" in the second paragraph to this circled item. The main content area shows the "Annual Fund" section with a help icon, a description, and a blue button labeled "Set and Edit Your Goals".

You should see the following screen (next page):

The most useful reports are (in order of significance):

**Paul Harris Society Report:** Shows you any/all of your members that are signed up for Paul Harris Society.

**EREY Eligibility:** Shows you how many potential **Sustaining** members and how many **EREY** members you have.

**Club Recognition Summary:** Shows you information about each of your Club members.

**Did you know that your own, personal donor history is available to you here?**

**Donor History Report:** is only about you (or specifically the person how logged in to the system). The main page is like a summary of your giving record. There is a **Details TAB** along the **bottom** of the screen; it gives a chronological rundown of your giving history.

Feel free to explore any of the other reports.