



為扶輪基金會籌募巨額捐獻 工作責任和日期

Raising Major Gifts for The Rotary Foundation Job Responsibilities and Calendar

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地區永久基金主委 – 任期參考

地區總監在任職的年份內會指派扶輪基金地區永久基金委員會主委。該委任是為期三年，但每年度終了時都要對該委任來加以檢討。

主委會與地區總監討論再指派最少三位扶輪社員擔任該永久基金地區委員會主委的委員。地區委員會其他的委員指派的為三年任期。他們的委任應每年來加以檢討。

主委的責任如下列：

1. 領導達成地區巨額捐獻的目標
2. 每兩年最少一次參加位於地理置適中扶輪基金所主辦的訓練。
3. 訓練及教育委員會其他的委員和支援地區和扶輪社的義工們。
4. 與地區總監合作，確保每年由地區委員會其中委員之一來執行在地區內的每個扶輪社都有關於扶輪基金的演講，其演講的重點在於永久基金的捐獻的方面。
5. 確保地區總監與地域扶輪基金協調人得知所有訊息，協調永久基金地區委員會與地區之間的活動，還有其他國際扶輪計畫、活動以及大事件來達到最有效率的基金募款目標。
6. 確保在每個社演說之後，地區委員會中的一位委員要與社長聯絡並商量有關與地區委員會合作的三位社員人選來尋找有潛力的巨額捐獻人。
7. 運用基金會所提供的捐獻人追蹤與資料管理系統，來維護地區層級一份有潛力的巨額捐獻人名單，並為每一位有潛力的巨額捐獻人建立檔案。
8. 每年最少兩次籌組和主持(如果需要時)巨額捐獻研習會和附加專為接受邀請的社員以及其他的有潛力的捐獻人的培養活動。
9. 確實追蹤特定有意願的捐獻人並提供有關計劃和基金會捐贈政策完整與適當的訊息給所有捐獻人與未來捐獻人。
10. 告知巨額捐獻顧問(如需要時，扶輪基金辦事員)所要進行的活動並在需要時提出可要求適當的協助，包含供應或是安排專業技術專家。
11. 在需要時提供一種標準和正規基礎的資訊和進度報告給巨額捐獻顧問和基金會。
12. 要由適當的扶輪社員與巨額捐獻職員來管理和撥打巨額捐獻電話。

District Permanent Fund Chairs – Terms of Reference

The Rotary Foundation District Permanent Fund Committee Chair will be appointed by the District Governor for their service years. The appointment shall be for three years, but reviewed at the end of each year.

The Chair will request that their District Governor, in consultation with them, appoint at least three additional Rotarians to serve as members with the Chair of the Permanent Fund District Committee. The other members of the district committee shall be appointed to three-year terms. Their appointments shall be subject to review annually.

The duties of the Chair shall be the following:

1. To provide personal leadership toward achievement of district major gift goals.
2. To attend the Foundation-sponsored training at a centralized location, at least once every two years.
3. To train the other members of the committee and supporting district and club volunteers.
4. To work with the District Governor to ensure that, annually, each Rotary club in the district receives a presentation on The Rotary Foundation, with a special emphasis on giving to the Permanent Fund, conducted by one of the members of the district committee.
5. To keep the District Governor and the Regional Rotary Foundation Coordinator informed and to coordinate activities of the Permanent Fund District Committee with district and other RI programs, activities, and events in order to take maximum advantage thereof for fund raising purposes.
6. To ensure that, following each club presentation, a member of the district committee contacts and consults with the club president with regard to the selection of three club members to work with the district committee to identify potential major donors.
7. Utilizing such donor tracking and information management systems as the Foundation may provide, to maintain a potential major donors list at the district level, and to establish a profile for each potential major donor identified.
8. To organize and chair (when appropriate) at least two major gift seminars and additional cultivation events for invited Rotarians and other potential donors each year.
9. To ensure follow-up with specific donor prospects who indicate interest and to fully and appropriately provide to all donors and prospective donors information about the programs and donation-related policies of the Foundation.
10. To inform the Major Gifts Advisor (and Rotary Foundation staff when appropriate) of their activities and to request appropriate assistance when necessary, including the provision or arrangement of professional technical expertise.
11. To provide on a standard and regular basis such information and progress reports to the Major Gifts Advisors and to the Foundation as needed.
12. To manage and make major gift calls with appropriate Rotarians and Major Gift Officers.

地區永久基金主要的目標：

- 自己領先示範捐贈一份現款給扶輪基金會；
- 與主要的地區領導人(總監、總監當選人、地區其他在有影響力的扶輪社員) 建立巨額捐獻程序的重要性；
- 作一個個人的遺贈承諾給永久基金；
- 建立與運用一個訓練良好、運作的委員會；
- 每一季要有三次捐獻的邀請；
- 持續培養未來的巨額捐獻；
- 在扶輪社層級推廣永久基金捐獻人計劃和“兩種需求，兩種捐獻的方法”的訊息；
- 每個月最少一次要與巨額捐獻顧問保持聯繫

地區永久基金主要行事歷

七月之前

與最近一任的地區永久基金主委聯繫並聽取報告和分享有關正在規畫、進行中的捐獻的邀請和預期捐助人的資訊。

參加地區巨額捐獻顧問所主持的訓練會議。

與地區總監、總監當選人、地區扶輪基金會主委和其他地區重要領導人溝通巨額捐獻的優先順序。

建立你的委員會。可能的話增加地區內的前總監、前地區永久基金主委、地區助理總監或前地區助理總監、巨額捐獻人、稅務專家、募款專家、律師、地產規劃專家。並且所有計畫與聯繫都要包括你的地區總監、地區總監當選人。

七月

安排貴委員會的工作：

召集貴委員會來審查貴地區內預期捐助人的狀態。

邀請地區總監、地區總監當選人、巨額捐獻顧問、地區扶輪基金會主委、年度捐獻小組委員會主委和其他地區重要人員一同開會。

在這個會議：

檢討上一個年度地區的巨額捐獻捐贈的成果。

排列與依優先順序處理貴地區的未來捐贈人。

選出在第一季三位預期捐助人來進行邀請捐獻。對每一位預期捐助人繳交一份“預期初次捐獻人表格”給你的巨額捐獻顧問

對每一位預期捐助人發展出邀請捐獻的策略。指派一個委員會委員的團隊來安排初次的會議及邀請捐獻的會議。尋找一位最適當的個人來對預期捐助人進行邀請捐款。

在會議上要向你的巨額捐獻顧問報告，包含你所進行的邀請捐獻計畫。

一季安排一次與你的委員會和地區領導人開會。

指派一位委員會委員在地區年會中或是其他地區適當的時間去籌備和計畫一個巨額捐獻人表彰/培養活動。(請參閱活動規劃章節)

檢視地區活動行事曆，是否可包括表彰活動或培養活動(會議、基金會晚餐會...等)。指派一位委員會委員來籌備每一項活動。

聯絡你的巨額捐獻職員辦事員來介紹你自己或是保持

DISTRICT PERMANENT FUND CHAIR GOALS:

- To lead by example by making a gift to The Rotary Foundation;
- To establish the importance of the major gifts process with the key district leaders (DG, DGE, other prominent Rotarians in the district);
- To make a personal bequest commitment to the Permanent Fund;
- To establish and utilize a well trained, working committee;
- To make three solicitations per quarter;
- Ongoing cultivation of major gift prospects;
- To promote the Benefactor program and the “Two Needs Two Ways” message at the club level;
- To communicate with the Major Gifts Advisor at least once monthly.

District Permanent Fund Chair Calendar

Before July

Contact the last District Permanent Fund Chair to debrief and share information regarding planning, ongoing solicitations and prospects.

Attend training led by Major Gifts Advisor.

Meet to communicate the priority of major giving with your District Governor, District Governor-elect, District Rotary Foundation Chair and other key district leaders.

Establish your committee. Possible additional committee members are past District Governors, past District Permanent Fund Chairs, Assistant District Governors or past Assistant District Governors, major donors, tax professionals, fund-raising professionals, lawyers, estate planning professionals in the district. Include your District Governor and District Governor-elect in all plans and correspondence.

July

Organize the work of your committee:

Assemble your committee to review the status of prospects in your district.

Invite the District Governor, District Governor-nominee, Major Gifts Advisor, District Rotary Foundation Chair, Annual Giving Subcommittee Chair and any other key players in the district to this meeting.

At this meeting:

Review the success of the district's major gift giving in the last year.

Rank and prioritize your district's prospects.

Choose three prospects for solicitation in the first quarter. Submit an “Initial Donor Prospect Form” to your Major Gifts Advisor for each prospect.

Develop solicitation strategies for each prospect. Assign a team of committee members to organize the initial meetings as well as the solicitation meeting. Identify the most appropriate individual to solicit each prospect.

Report on your meeting to your Major Gifts Advisor, including the solicitation plans you have made.

Schedule quarterly meetings with your committee and your district leadership.

Assign a committee member to schedule and organize a major donor recognition/cultivation event at the district conference or at another appropriate time for the district. (See chapter on Event Planning.)

Review the district calendar for district activities that could include recognition events or cultivation events (meetings, Foundation dinners, etc.). Assign a committee member to organize each event.

Contact your staff Major Gifts Officer to introduce yourself or to maintain your open line of communication.

你對外的聯繫。

參加你的巨額捐獻顧問的每季會議或是電話會議。

進行三位名單上預期捐助人作本季第一次邀請捐獻。

八月

繼續致力於地區永久基金委員會議規劃培養及邀請捐獻的活動。

與你的地區總監、地區扶輪基金會主委及每位扶輪社長討論並安排演講日程，該演講將強調於永久基金計劃與“兩種需求，兩種捐獻的方法”。

聯絡你的地區年會的節目主委節目議程上安排介紹永久基金的訊息及更新資料。

進行三位名單上預期捐助人作本季第二次邀請捐獻活動。

聯絡你的巨額捐獻顧問並呈交培養及邀請捐獻活動的最新狀況。

九月

進行三位名單上預期捐助人作本季第三次活動。

追蹤第一季三位邀請捐獻的結果。

於扶輪社做簡報。

聯絡你的地區總監提名人並協助其設定下個扶輪年度的永久基金捐獻人目標。

聯絡你的巨額捐獻顧問並呈交培養及邀請捐獻活動的最新狀況。

利用永久基金捐獻人報告來協助預測。

十月

於扶輪社做簡報。

召開地區永久基金委員會審核貴地區預期的狀況。(使用上述第一季會議相同的邀請名單。)

在這個會議中：

評估並排列出地區預測的優先順序。

選擇出三位預期捐助人的邀請列入第二季活動。

針對每位預期捐助人發展出邀請捐獻的策略。指派一個由委員們組成的小組去籌備初次的會議及邀請捐獻會議。找出最適合的人員去邀請每位預期捐助人。

與你的委員和地區領導人確定一月及四月的季會議。

要求每位委員列出於 11 月份的扶輪基金月，至少於三個扶輪社做簡報的行程。

審核一次表彰/培養活動的規劃 (如果尚未審核)。

分享永久基金捐獻人報告並將那些要求過郵寄“憧憬”資料者的名單當作新的預期捐助人的資料來源。

在你的會議上向你的巨額捐獻顧問報告。最重要的是要包括你所製作的邀請捐獻計劃。同時讓巨額捐獻顧問瞭解培養及邀請捐獻的最新資料。

進行三位名單上預期捐助人作本季第一次邀請捐獻。

會同你的夥伴地區永久基金主委員們一起參加巨額捐獻顧問的季會議或視訊會議。

十一月

與你的地區總監籌設製作節日感謝函並寄給地區巨額捐獻人及遺贈協會會員們。

於扶輪社做簡報。

Attend your Major Gifts Advisor's quarterly meeting or conference call.

Make the first solicitation of the three scheduled this quarter.

August

Work on cultivation and solicitation activities as planned at district Permanent Fund committee meeting.

In consultation with your District Governor, District Rotary Foundation Chair and each club president, schedule club presentations highlighting the Benefactor program and "Two Needs, Two Ways of Giving."

Contact the program chairman of your district conference to schedule time on the agenda to present information and updates regarding the Permanent Fund.

Make the second solicitation of the three scheduled this quarter.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations.

September

Make the third of the three scheduled this quarter.

Follow-up on the first quarter's three solicitations.

Make club presentations.

Contact your District Governor-nominee to assist him or her in setting a Benefactor goal for the next Rotary year.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations.

Use Benefactor report as prospecting tool.

October

Make club presentations.

Assemble the District Permanent Fund committee to review the status of prospects in your district. (Use same invitation list as for first quarterly meeting above.)

At this meeting:

Rank and prioritize your district's prospects.

Choose three prospects for solicitation in the second quarter.

Develop solicitation strategies for each prospect. Assign a team of committee members to organize the initial meetings as well as the solicitation meeting. Identify the most appropriate individual to solicit each prospect.

Confirm the quarterly meetings for January and April with your Committee and your district leadership.

Have each member of the committee schedule a minimum of three club presentations during November, Foundation month.

Review plans for a recognition/cultivation event (if not already held).

Share the Benefactor report and the names of those who requested information from the "Visions" mailing as sources for new prospects.

Report on your meeting to your Major Gifts Advisor. Most importantly include the solicitation plans you have made. Update your Major Gifts Advisor on ongoing cultivation and solicitations.

Make the first solicitation of the three scheduled this quarter.

Attend your Major Gifts Advisor's quarterly meeting or conference call with your fellow District Permanent Fund Chairs.

November

Organize a holiday thank-you mailing to your district's major donors and Bequest Society members with your District Governor.

Make club presentations.

進行三位名單上預期捐助人作本季第二次邀請捐獻。
完成在12月31日前因報稅需要而捐贈的任何預期捐助人的邀請捐獻活動。
聯絡你的巨額捐獻顧問並呈交更新的培養及邀請捐獻表格並討論個別預期捐助人的興趣。

十二月

親自處理完成第二季的三位邀請捐獻。

進行三位名單上預期捐助人作本季第三次邀請捐獻。
於扶輪社做簡報。
完成在12月31日前因報稅需要而捐贈的任何捐贈。

向分發中心訂購扶輪年度的第二個六個月所需的出版物。中心電話：(847) 866-4600，傳真：(847) 866-3276。
聯絡你的巨額捐獻顧問並呈交更新的培養及邀請捐獻表格和討論每位預期捐助人的興趣。
舉行節日培養活動。

一月

於扶輪社做簡報。

召開地區永久基金委員會審核貴地區預期的狀況。(使用上述每季會議相同的邀請名單。)

在這個會議中：

評估並排列出地區預測的優先順序。
選擇出三位預期捐助人的邀請列入第三季活動。
針對每位預期捐助人發展出邀請捐獻的策略。指派一個由委員們組成的小組去籌備初次的會議及邀請捐獻會議。找出最適合的人員去邀請每位預期捐助人。
完成表彰/培養活動的規劃(如果尚未舉辦)。

與你的委員和地區領導人確定四月的季會議。。

分享那些要求過郵寄“憧憬”資料者的名單當作新的預期捐助人的資料來源。

在你的會議上向你的巨額捐獻顧問報告。要包括你所製作的邀請捐獻計劃。同時讓巨額捐獻顧問瞭解培養及邀請捐獻的最新資料。

會同你的夥伴地區永久基金主委員們一起參加巨額捐獻顧問的季會議或視訊會議。

追蹤第二季的三位邀請捐獻事宜。

進行三位名單上預期捐助人作本季第一次邀請捐獻。

與您的巨額捐獻顧問聯絡以維持您們彼此間的溝通暢通。

二月

於扶輪社做簡報。

聯絡在您區域當中的每個社團，要求社團中各近期的贊助者以及要求你的社團聯絡人(club contact)在主要贊助預期計劃中給予您協助。

進行三位名單上預期捐助人作本季第二次邀請捐獻。

聯絡你的巨額捐獻顧問並呈交更新的培養及邀請捐獻的資訊。

三月

於扶輪社做簡報。

進行三位名單上預期捐助人作本季第三次邀請捐獻。

親自處理完成第三季的三位邀請捐獻。

Make the second solicitation of the three scheduled this quarter.

Complete any solicitations of prospects that may want to make their gift by 31 December for tax reasons.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations form and discuss individual prospect's interests.

December

Personally manage to completion your second quarter's three solicitations.

Make the third solicitation of the three scheduled this quarter.

Make club presentations.

Complete any gifts that must be made by 31 December for tax reasons.

Order publications necessary for the second six months of the Rotary year by contacting the Distribution Center at (847) 866-4600 or by fax at (847) 866-3276.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations form and discuss individual prospect's interests.

Hold a holiday cultivation event.

January

Make club presentations.

Assemble the District Permanent Fund committee to review the status of prospects in your district. (Invite the same attendees as listed above for quarterly meetings.)

At this meeting:

Rank and prioritize your district's prospects.

Choose three prospects for solicitation in the third quarter.

Develop solicitation strategies for each prospect. Assign a team of committee members to organize the initial meetings as well as the solicitation meeting. Identify the most appropriate individual to solicit each prospect.

Finalize plans for the recognition/cultivation event (if not already held).

Confirm the quarterly meeting for April with your Committee and your district leadership.

Share the names of those who requested further information from the "Visions" mailing as a good source for new prospects.

Report on your meeting to your Major Gifts Advisor, including the solicitation plans you have made. Update your Major Gifts Advisor on the status of ongoing cultivation and solicitations.

Attend your Major Gifts Advisor's quarterly meeting or conference call with your fellow District Permanent Fund Chairs.

Follow-up with the second quarter's three solicitations.

Make the first solicitation of the three scheduled this quarter.

Contact your staff Major Gift Officer to maintain your open line of communication.

February

Make club presentations.

Contact each club in your district. Inquire as to any recent donor activity within the club and ask the club contact to assist you in identifying major gift prospects.

Make the second solicitation of the three scheduled this quarter.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations.

March

Make club presentations.

Make the third solicitation of the three scheduled this quarter.

Personally manage to completion your third quarter's three solicitations.

聯絡你的巨額捐獻顧問並呈交更新的培養及邀請捐獻表格和討論每位預期捐助人的興趣。

利用永久基金捐獻人報告(來自巨額捐獻顧問 MGA)作為預期的工具。

四月

於扶輪社做簡報。

召開地區永久基金委員會審核貴地區預期的狀況。(邀請上述每季會議所建議邀請的其他地區領導人。)

針對每位預期捐助人發展出邀請捐獻的策略。指派一個由委員們組成的小組去籌備初次的會議及邀請捐獻會議。找出最適合的人員去邀請每位預期捐助人。

與你的委員和地區領導人確定七月的季會議。

檢討任何舉辦過成功的表彰/培養活動。

提醒於下年度的活動去作調整改進。

檢討你成功的扶輪社簡報。

分享那些要求過郵寄“憧憬”資料者的名單當作新的預期捐助人的資料來源。

分享三月所收到的永久基金捐獻人報告當作新的預期捐助人的資料來源。

在你的會議上向你的巨額捐獻顧問報告。要包括你所製作的邀請捐獻計劃。同時讓巨額捐獻顧問瞭解培養及邀請捐獻的最新資料。

進行三位名單上預期捐助人作本季第一次邀請捐獻。

五月

扶輪社做簡報。

追蹤以確認個人已聯絡第四季三位邀請捐獻事宜。

進行三位名單上預期捐助人作本季第二次邀請捐獻。

完成任何在扶輪年度結束前要提供他們的捐贈的邀請捐獻活動。

聯絡你的巨額捐獻顧問並呈交更新的培養及邀請捐獻表格和討論每位預期捐助人的興趣。

與你的地區總監以及地區總監提名人，檢查你的委員會的效率並於下一扶輪年度來做任何人事上的調整改變。

會同你的夥伴地區永久基金主委員們一起參加巨額捐獻顧問的季會議或視訊會議。

六月

扶輪社做簡報。

進行三位名單上預期捐助人作本季第三次邀請捐獻。

為下個月的委員會會議回顧來檢視一下這一年度。

追蹤並協助任何希望在扶輪年度終了前完成捐贈的捐獻人。

向分發中心訂購扶輪年度的第一個六個月所需的出版物。中心電話：(847) 866-4600，傳真：(847) 866-3276。

聯絡你的巨額捐獻顧問並呈交更新的培養及邀請捐獻表格和討論每位預期捐助人的興趣。

Contact your Major Gifts Advisor to submit update on cultivations and solicitations form and discuss individual prospect's interests.

Use Benefactor report (from MGA) as prospecting tool.

April

Make club presentations.

Assemble the District Permanent committee to review the status of prospects in your district. (Invite other district leaders as suggested above for quarterly meetings.)

Develop solicitation strategies for each prospect. Assign a team of committee members to organize the initial meetings as well as the solicitation meeting. Identify the most appropriate individual to solicit each prospect.

Schedule a quarterly meeting for July with your Committee and your district leadership.

Review the success of any recognition/cultivation events held. Note changes for next year's event.

Review the success of your club presentations.

Share the names of those who requested further information from the "Visions" mailing as a good source for new prospects.

Share the Benefactor report you received in March as a good source for new prospects.

Report on your meeting to your Major Gifts Advisor, including the new solicitation plans you have made. Update your Major Gifts Advisor on the status of your other cultivations/ solicitations.

Make the first solicitation of the three scheduled this quarter.

May

Make club presentations.

Follow-up to ensure that personal contact is made with the fourth quarter's three solicitations.

Make the second solicitation of the three scheduled this quarter.

Complete any solicitations of prospects that might want to make their gift by Rotary year-end.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations form and discuss individual prospect's interests.

In consultation with your District Governor and District Governor-nominee, examine the effectiveness of your committee and make any changes of personnel necessary for the next Rotary year.

Attend your Major Gifts Advisor's quarterly meeting or conference call with your fellow District Permanent Fund Chairs.

June

Make club presentations.

Make the third solicitation of the three scheduled this quarter.

Review the year for next month's committee meeting.

Follow up with and assist any donors that might want to complete a gift by Rotary year-end.

Order publications necessary for the first six months of the Rotary year by contacting the Distribution Center at (847) 866-4600 or by fax at (847) 866-3276.

Contact your Major Gifts Advisor to submit update on cultivations and solicitations form and discuss individual prospect's interests.

