



FOUNDATION REPORTS

ACCESS TO REPORTS

The screenshot shows the Rotary.org website interface. At the top, there is a dark blue header with the Rotary logo, "My Rotary", and navigation links for "Rotary.org", "Club Finder", "JOIN", and "DONATE". Below the header is a secondary navigation bar with categories: "Exchange Ideas", "Take Action", "Learning & Reference", "Manage", "The Rotary Foundation", "News & Media", and "Member Center". The main content area is divided into several columns. The left column is titled "Club & District Administration" and includes links for "Club Administration", "District Administration", "Contributions", "Reports", and "Rotary Club Central". A blue arrow points from the "Reports" link to a blue callout box. The callout box contains the text: "Sign in to My Rotary. Go to **Manage**, then **Reports**." Other columns include "Community Marketplace" and "Products & Services".

The screenshot shows the "Reports" page on the Rotary.org website. A large blue arrow on the left points downwards. A blue callout box points to the "Reports" heading and contains the text: "Scroll to the bottom of the **Reports** page." The page content includes sections for "Individual Reports" and "Contributions & Recognition". Under "Contributions & Recognition", there is a "Donor History Report" with a description: "View your contributions to The Rotary Foundation and track your progress toward achieving recognition." Below this report are links for "View report", "Give online", and "Mail your contribution". On the right side of the page, there is a "What do you want to do?" section with a dropdown menu and social media icons for Facebook, Twitter, LinkedIn, Email, and Print. Below that is a "My Quick Links" section with the text: "You have no Quick Links. To add links, click on the ☆ icon and choose 'Add to My Quick Links.' To remove links, click on the ☆ icon."

LOCATING FOUNDATION REPORTS

Contributions & Recognition

☆ **Club Giving**
Paul Harris Fellowship and Benefactor Report, Club Recognition Summary, Club Foundation Banner Report, Major Donor, Arch Klumph Society and Bequest Society Report, Club Fundraising Analysis, Paul Harris Society Report, Current Club Officer Giving Report, Incoming Officer Giving Report
[View reports](#)

☆ **District Giving**
Monthly Contribution Report, Available DDF by District, SHARE Contribution Detail, Term/Endowed, Availability Report, PolioPlus Report, Endowed Fund Update, Foundation Banner Report, District Fundraising Analysis
[Add to My Quick Links](#)
[View reports](#)

☆ **Donor Summary**
Donor Summary Report (DRFC only)
[View report](#)

Awards

☆ **Rotary Citation**
Check the progress for the clubs in your district toward earning a Rotary Citation.
[Rotary Citation recipients report](#) | [Nominate Interact clubs](#) | [About the program](#)

Alumni

☆ **Program Participants & Alumni**
View current and past program participants by district.
[View report](#)

EXPORTING REPORTS

The screenshot shows a web application interface for 'Rotary PROD ENV.' with several open tabs: 'Home', 'Documents', 'Grant Detail', 'TRF Annual Giving and R...', 'Annual Fund Report - Dis...', 'District Fundraising Anal...', and 'Club Fundraising Anal...'. The 'Web Intelligence' toolbar includes icons for file operations, a red circle highlights the 'Export' icon, and a dropdown menu is set to 'Club Name (All values)'. An 'Export' dialog box is open, showing options to 'Select' 'Reports' (selected) or 'Data'. Under 'Select', 'Select All' and 'All Clubs' are checked. The 'File Type' dropdown is open, showing options: 'PDF', 'PDF', 'Excel (.xlsx)' (highlighted), 'Excel (.xls)', 'CSV Archive', and 'Text'. A red circle highlights the 'Excel (.xlsx)' option. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

CLUB FOUNDATION BANNER REPORT

Rotary 

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Contribution & Recognition Reports

Click on the report name that you want to view. You will see a report opening in a new window or tab.

Club Reports

- Paul Harris Fellow and Benefactor Report
- Club Recognition Summary
- **Club Foundation Banner Report**
- Major Donor, Arch C. Klumpp Society and Bequest Society Report
- Club Fundraising Analysis
- Paul Harris Society Report

District Reports

- Monthly Contribution Report
- Available DDF by District
- SHARE Contribution Detail
- Term/Endowed, Global Grant, Gift Availability Report
- PolioPlus Report
- Endowed Fund Update
- Foundation Banner Recognition Status Report
- District Fundraising Analysis

Club Officer Giving Report

- Current Club Officer Giving Report
- Incoming Club Officer Giving Report

Please note: Contribution data updates may take up to 4-6 days to be reflected on the reports upon receipt by RI. During peak periods, it may take 8-11 days to be reflected.

CLUB FOUNDATION BANNER REPORT



CLUB FOUNDATION BANNER REPORT

FOR ROTARY YEAR: 2016-17

Rotary Club of Narnia, IN (1234), District 4321								1 July Members	27		
All Active Rotarians	25	TRF Giving Rotarians:	14	EREY Rotarians:	14	Sustaining Member Rotarians:	4	PHS Eligible Rotarians:	0	Annual Fund Per Capita:	\$39.83
Existing Active Rotarians	25	Percent TRF Giving:	56.0%	Percent EREY:	56.0%	Percent Sustaining Members:	16.0%	Percent PHS Eligible:	0.0%	Average TRF Giving:	\$39.83

Existing Active Rotarians are those who have an admission date prior to 1 July. Beginning in 2015-16, only existing members are counted for EREY, TRF Giving, RFSM or PHS participati

Not all recognition types included may be eligible for a banner for the selected year. Please see definitions tab.

Rotary ID	Rotarian Name	Club Member on 27-Feb-17	TRF Giving Achieved	EREY Achieved	Sustaining Member Achieved	PHS Eligible Achieved	Paul Harris Society Member	Rotary Direct
1554108	Allday, Robert L	Y	31-Dec-2016 C	31-Dec-2016	31-Dec-2016			
5872546	Badger, Stacey	Y						
992698	Benihana, George	Y	09-Oct-2016 C	09-Oct-2016	09-Oct-2016	31-Dec-2016	Y	Y

CLUB RECOGNITION SUMMARY


CLUB RECOGNITION SUMMARY
 AS OF 10 SEPTEMBER 2021

Rotary Club of Rotarv. United States
 100% Paul Harris Fellow Club 2006 - 2007

District: 7780	Paul Harris Fellows: 29	Bequest Society: 1	Rotarian Donors: 51	Rotary Direct Donors: 1	All-Time Giving: \$###,###
Club: ####	Benefactors: 3	Major Donors: 0	Rotarian Non-Donors: 1	Non-Rotarian Donors: 0	

Rotary ID	Name	Club Member	Recognition Amount	Current PHF Level	PHF Date	Foundation Recognition Pts Available	-- Last Contribution --	Benefactor	Rotary Direct
####	R/C of ####					6,738.59	Aug-2021 POLIO PLUS		
#####	Abhekakng, Rha,ldng	Y	8,220.00	PHF+7	Apr-2005	1,270.00	Sep-2020 AF-SHARE	Y	
#####	Beudhakjikh, Jlkjough	Y	3,050.00	PHF+2	Oct-2018	2,050.00	Aug-2021 AF-SHARE	N	Y
#####	Cyutywbn, Stqusathkak	Y	75.00			75.00	May-2021 AF-SHARE	N	
#####	Dhkajlkjalkghaagk, Rhkhaieha	Y	75.00			75.00	May-2021 AF-SHARE	N	
#####	Eakdfa,he, Naiihgiaeih	Y	3,620.00	PHF+2	Jan-2010	420.00	Nov-2020 AF-SHARE	N	
#####	Fqeiiahvcxi, Dawraibnkae	Y	450.00			450.00	May-2021 AF-SHARE	N	
#####	Gqwresvx, Fdeargsfkjes	Y	100.00			100.00	May-2021 AF-SHARE	N	
#####	Hawrewxb, Daerbaert	Y	1,460.00	PHF	Aug-2020	460.00	Mar-2021 AF-SHARE	N	
#####	Iawreearb, Waeresrayvc	Y	100.00			100.00	May-2021 AF-SHARE	N	
#####	Jwrewabc, Kaewrvcxn	Y	1,350.00	PHF	Apr-2014	350.00	May-2021 AF-SHARE	Y	
#####	Kaeraewrb, Mkjawert	Y	130.00			130.00	May-2021 AF-SHARE	N	
#####	Laewrewrsb, Tvxcdtyah	Y	2,150.00	PHF+1	May-2007	150.00	May-2021 AF-SHARE	N	
#####	Mawrawrabvc, Pjbaerwwa	Y	1,175.00	PHF	Mar-2015	175.00	May-2021 AF-SHARE	N	
#####	Nvzsersr, Ekabvcxset	Y	6,220.00	PHF+5	Mar-2002	1,020.00	Sep-2020 AF-SHARE	N	
#####	Ovzaesrb, Awerpoug	Y	65.00			65.00	May-2019 AF-SHARE	N	
#####	Pbxvsret, Jmbauywrq	Y	1,170.00	PHF	Jun-2008	120.00	May-2021 AF-SHARE	N	
#####	Qvcsetsh, Idrtrbnrt	Y	1,230.00	PHF	Mar-2020	430.00	Dec-2020 AF-SHARE	N	
#####	Roiuiyugx, Rsetdnrst	Y	1,965.00	PHF	Jul-2003	465.00	Mar-2021 AF-SHARE	N	
#####	Sqwegfeyt, Wxtdrytr	Y	9,000.00	PHF+8	Sep-1983	1,380.00	Sep-2020 AF-SHARE	Y	
#####	Tosetysyew, Yawrxsetw	Y	1,295.00	PHF	Mar-2020	295.00	May-2021 AF-SHARE	N	
#####	Uweradswte, Twaresset	Y	250.00			250.00	Mar-2021 AF-SHARE	N	
#####	Voiuwaerb, Bwrdfarwer	Y	100.00			100.00	May-2021 AF-SHARE	N	
#####	Wosertm, Atnertsert	Y	110.00			110.00	May-2021 AF-SHARE	N	
#####	Xqwrstfyrser, Erabretwqrw	Y	4,620.00	PHF+3	Feb-1990	620.00	Sep-2020 AF-SHARE	N	
#####	Yawweaw, Svdwaekjwer	Y	1,150.00	PHF	Mar-2017	150.00	May-2021 AF-SHARE	N	

Personal data on this report should be used for authorized Rotary purposes only. By accessing this data, you agree to abide by [Rotary's Data Use Policy](#).

CLUB RECOGNITION SUMMARY

 **CLUB RECOGNITION SUMMARY**
AS OF 10 SEPTEMBER 2021

Below is an explanation of Club Recognition Summary columns:

* + *: Indicates individual is deceased.

** *: Indicates constituents with recognition amounts over 9,000.

Rotary ID: A Constituent's Rotary International identification number. If the constituent is a non-Rotarian or a non-Rotary organization, this is his/her/their donor account number. An individual should have only one identification number. That number will always contain a Rotarian's membership and contribution history. Duplicate accounts should be reported to The Rotary Foundation as outlined above.

Name: Listed are all constituents associated with a Rotary club. Please note that name prefixes and titles do not appear on the report, eg.: Mr./Mrs./Ms.

Club Member: This column states whether the person is a Rotarian in the Rotary club under which his/her name appears. Y = Active Member, H= Honorary Member, N = Non-Rotarian.

Recognition Amount: The total Paul Harris Fellow recognition credited to an individual's account. Recognition may be achieved with one's personal contributions to the Foundation, a contribution made on behalf of the account holder, or a transfer of Foundation Recognition Points from a Rotary club, district, or another individual. (Note: gifts to the Endowment Fund are not eligible for Paul Harris Fellow recognition and are not included in this column). For confidentiality reasons, this report will not display recognition amounts greater than 9,000.

Current PHF Level: Recognition levels are determined based on the following guidelines:

Recognition Amount	PHF Levels	Pin donor or recipient is eligible to wear
1,000 to 1,999.99	PHF	original PHF pin
2,000 to 2,999.99	PHF+1	one sapphire
3,000 to 3,999.99	PHF+2	two sapphires
4,000 to 4,999.99	PHF+3	three sapphires
5,000 to 5,999.99	PHF+4	four sapphires
6,000 to 6,999.99	PHF+5	five sapphires
7,000 to 7,999.99	PHF+6	one ruby
8,000 to 8,999.99	PHF+7	two rubies
9,000 to 9,999.99	PHF+8	three rubies

Paul Harris Fellow recognition is applicable only to individuals. An organization can be recognized upon request with a Certificate of Appreciation when its Recognition Amount reaches \$1,000.

PHF Date: Indicates when the account holder became a Paul Harris Fellow.

Foundation Recognition Points: Awarded in appreciation for personal contributions from an individual or organization. Foundation Recognition Points may be transferred to other individuals to help them achieve their first or multiple PHF recognition. Starting in October 2011, points accumulate 1:1 for every dollar contributed (Note: gifts to the Endowment Fund are not eligible for Paul Harris Fellow recognition and are not included in this column).

Last Contribution Date and Designation: Displays month and year of most recent contribution and indicates the designation (Program Fund). Anonymous contributions are excluded.

Benefactor: Indicates that the individual is a Benefactor.

Rotary Direct: Indicates individuals who are enrolled in Rotary's recurring giving program (Rotary Direct) on a monthly, quarterly or annual basis.

CLUB FUNDRAISING ANALYSIS REPORT



Rotary

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Contribution & Recognition Reports

Click on the report name that you want to view. You will see a report opening in a new window or tab.

Club Reports

- Paul Harris Fellow and Benefactor Report
- Club Recognition Summary
- Club Foundation Banner Report
- Major Donor, Arch, G. Humphrey Society and Bequest Society Report
- **Club Fundraising Analysis**
- Fair Hams Society Report

District Reports

- Monthly Contribution Report
- Available DDF by District
- SHARE Contribution Detail
- Term/Endowed, Global Grant, Gift Availability Report
- PolioPlus Report
- Endowed Fund Update
- Foundation Banner Recognition Status Report
- District Fundraising Analysis

Club Officer Giving Report

- Current Club Officer Giving Report
- Incoming Club Officer Giving Report

Please note: Contribution data updates may take up to 4-6 days to be reflected on the reports upon receipt by RI. During peak periods, it may take 8-11 days to be reflected.

CLUB FUNDRAISING ANALYSIS REPORT


CLUB FUNDRAISING ANALYSIS
 INTERIM RESULTS FOR JULY THROUGH JANUARY (2021-22)

District 6440

Annual Fund Goal

2021-22	\$14,000
2020-21	\$14,000
2019-20	\$14,000
2018-19	\$12,500
2017-18	\$7,700

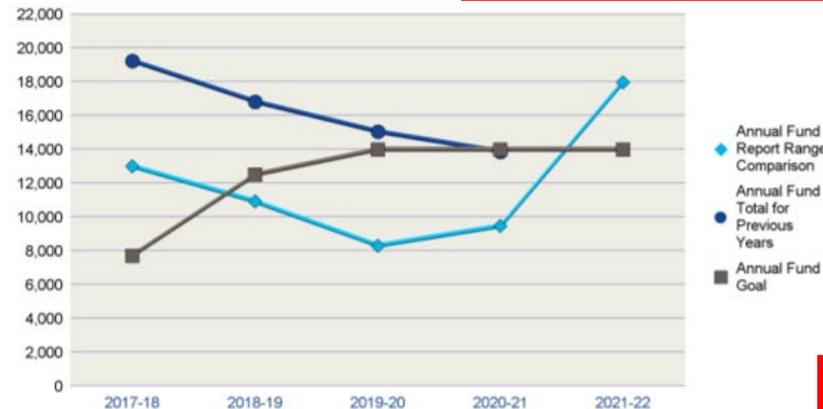
Annual Fund Contributions

2021-22	\$17,953
2020-21	\$13,869
2019-20	\$15,047
2018-19	\$16,821
2017-18	\$19,239

ABC Club, IL (1234)

Total Contributions

2021-22	\$24,539
2020-21	\$18,160
2019-20	\$22,609
2018-19	\$22,367
2017-18	\$23,120



AF Per Capita	Club	District
2021-22	\$272	\$94
2020-21	\$195	\$165
2019-20	\$181	\$172
2018-19	\$210	\$175
2017-18	\$247	\$185

Membership

2021-22	66
2020-21	71
2019-20	83
2018-19	80
2017-18	78

	EREY Members	Sustaining Members	PHS Eligible
2021-22	52	36	6
2020-21	37	22	5
2019-20	51	24	5
2018-19	55	33	4
2017-18	68	43	5

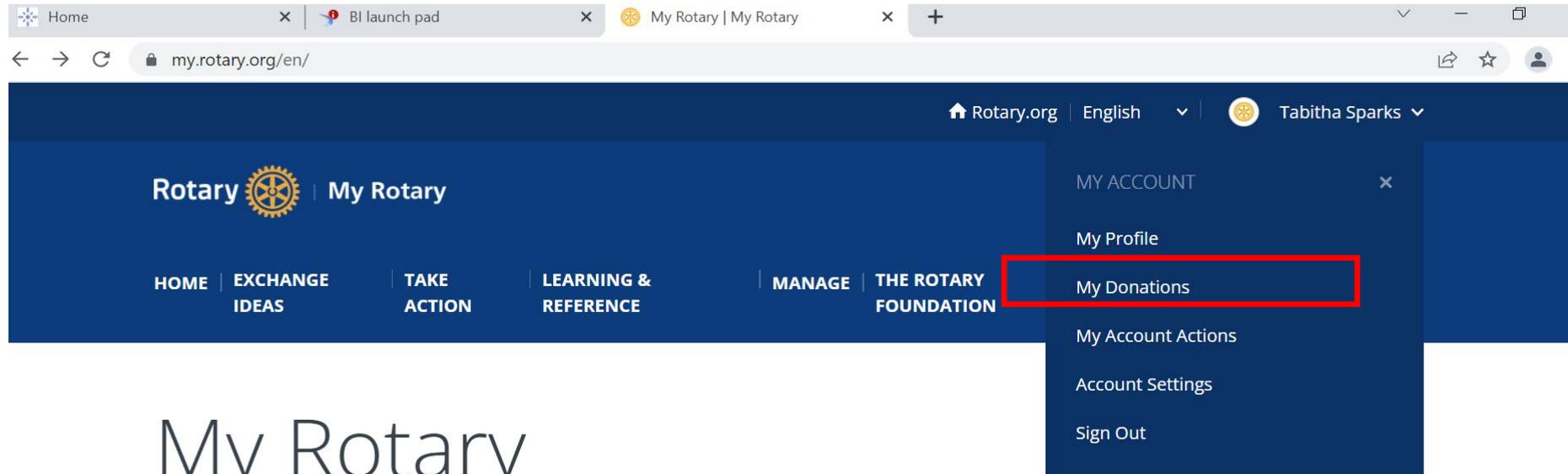
Annual Fund Report Range Comparison is the Annual Fund giving from 1 July to 31 January for current and previous years

The prior four-year average in Annual Fund giving from July through 31 January is \$10,422. This figure can be used to compare Annual Fund giving for the current Rotary year.

Total Contributions include Annual Fund, PolioPlus, approved Foundation Grants, Other Giving, and Endowment Fund (Permanent Fund) contributions for the reporting period.

Note: 'EREY Members' reflect the number of donors who contributed some amount to the Annual Fund during the Rotary Year. 'Sustaining Members'

YOUR PERSONAL GIVING



The screenshot shows a web browser window with three tabs: 'Home', 'BI launch pad', and 'My Rotary | My Rotary'. The address bar displays 'my.rotary.org/en/'. The website header is dark blue and contains the Rotary logo and 'My Rotary' text. Below the logo is a navigation menu with items: HOME, EXCHANGE IDEAS, TAKE ACTION, LEARNING & REFERENCE, MANAGE, and THE ROTARY FOUNDATION. On the right side of the header, there is a user profile section for 'Tabitha Sparks' with a dropdown menu. The dropdown menu is open, showing options: MY ACCOUNT (with a close icon), My Profile, My Donations (highlighted with a red box), My Account Actions, Account Settings, and Sign Out.

My Rotary



YOUR PERSONAL GIVING

HOME

EXCHANGE
IDEAS

TAKE
ACTION

LEARNING &
REFERENCE

MANAGE

THE ROTARY
FOUNDATION

NEWS &
MEDIA

MEMBER
CENTER

Donor Self-Service

[Profile](#) [Account Settings](#) [Donor Self-Service](#)

Donor Self-Service

Update your credit card information or other details of your recurring gift arrangement, make up a missed payment, or cancel your recurring donation.

Donor History Report

View all of your contributions, commitments, recognition, and Foundation recognition point transfers. Use this report to reconcile your contributions or review your recognition level.

Individual Contribution Form

Print and use this form if you or someone you know wishes to send a contribution to The Rotary Foundation or to use Foundation



YOUR PERSONAL GIVING



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[Have a question?
Visit our FAQ.](#)

View Your Contribution History

Click on the report name that you want to view. You will see a report opening in a new window or tab.

Individual Reports

- Donor History Report

Please note: Contribution data updates may take up to 4-6 days to be reflected on the reports upon receipt by RI. During peak periods, it may take 8-11 days to be reflected.

YOUR PERSONAL GIVING

Rotary  PROD ENV. Welcome: **Tabitha Sparks** | Applications ▾ Preferences Help menu ▾ | Log off

Home Documents **Donor History Report**

Web Intelligence ▾            Reading ▾

Navigation Map ▾

- Donor History Report
 - Overview
 - Transaction Detail

Display Gifts and Commitments From (All values) ▾

Rotary DONOR HISTORY REPORT

Date: 2 March 2022

[Redacted] (Rotary ID: [Redacted]); Rotary Club of [Redacted]

Further information on Rotary's privacy policy can be found at rotary.org/privacy.

Recognition - [Redacted]

Type

Major Donor or AKS:	-		
Bequest or Legacy Society:	-		
Benefactor:	-		

	Current Year	Last Year	
Paul Harris Society Eligible	-	-	
Sustaining Member	Nov-2021	Dec-2020	
Every Rotarian Every Year (US\$25)	Nov-2021	Dec-2020	

Paul Harris Fellow:	PHF
PHF Recognition Amount:	1,250.00
Foundation Recognition Points:	735.00
<i>(Available for transfer)</i>	
Paul Harris Society Member:	-

Gifts*

Type	Total	Annual Fund
Annual Fund		Annual Fund (100%)

YOUR PERSONAL GIVING

The screenshot displays the Rotary DONOR HISTORY REPORT interface. The page title is "Rotary DONOR HISTORY REPORT" with a "Rotary ID" field. The "Transaction Detail" section contains a table with the following data:

Date	Type	Donor Name	Designation	Notes	Contribution	Transfer	Credit Organization
12-Jan-2022	Transfer In			Brazosport -->		250	
28-Dec-2021	Recognition			PHF			
28-Dec-2021	Transfer In			Director -->		265	
19-Nov-2021	Contribution		Annual Fund - SHARE		\$100.00		Space Center (Houston) (2010)
24-Oct-2021	Contribution		PolioPlus Fund - PolioPlus		\$20.00		Space Center (Houston) (2010)
09-Oct-2021	Contribution		PolioPlus Fund - PolioPlus		\$250.00		Space Center (Houston) (2010)
28-Apr-2021	Contribution		PolioPlus Fund - PolioPlus		\$20.00		Space Center (Houston) (2010)
27-Dec-2020	Contribution		Annual Fund - SHARE		\$100.00		Space Center

The "Transaction Detail" tab is highlighted in the bottom navigation bar.



QUESTIONS

Questions?

INCREASE ENGAGEMENT IN TRF



CLUB FOUNDATION BANNER REPORT FOR ROTARY YEAR: 2016-17

Rotary Club of Narnia, IN (1234), District 4321

All Active Rotarians	25	TRF Giving Rotarians:	14	EREY Rotarians:	14	Sustaining Member Rotarians:	4	PHS Eligible Rotarians:	0	1 July Members	27
Existing Active Rotarians	25	Percent TRF Giving:	56.0%	Percent EREY:	56.0%	Percent Sustaining Members:	16.0%	Percent PHS Eligible:	0.0%	Annual Fund Per Capita:	\$39.83
										Average TRF Giving:	\$39.83

Existing Active Rotarians are those who have an admission date prior to 1 July. Beginning in 2015-16, only existing members are counted for EREY, TRF Giving, RFSM or PHS participati

Not all recognition types included may be eligible for a banner for the selected year. Please see definitions tab.

Rotary ID	Rotarian Name	Club Member on 27-Feb-17	TRF Giving Achieved	EREY Achieved	Sustaining Member Achieved	PHS Eligible Achieved	Paul Harris Society Member	Rotary Direct
1554108	Allday, Robert L	Y	31-Dec-2016 C	31-Dec-2016	31-Dec-2016			
5872546	Badger, Stacey	Y						
992698	Benihana, George	Y	09-Oct-2016 C	09-Oct-2016	09-Oct-2016	31-Dec-2016	Y	Y



Increase TRF Engagement





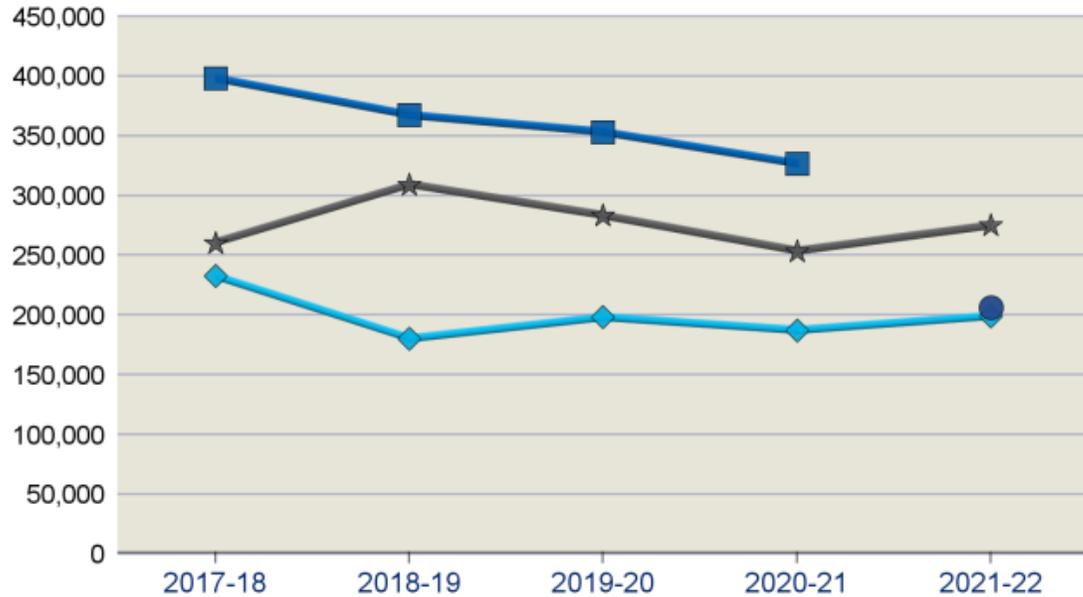
DISTRICT 6440 FUNDRAISING ANALYSIS

INTERIM RESULTS FOR JULY THROUGH MARCH 2021-22

	Number of Members	Annual Fund						PolioPlus Fund					Other Funds**	Endowment Fund	Total Giving
		Goal	% Goals Received	Total	Per Capita	Goal Achieved	Non-Giving Clubs	Goal	% Goals Received	Total	Goal Achieved	Non-Giving Clubs	Total	Total	
2021-22	1,946	\$275,075	97.0%	\$199,127	\$102.33	72.4%	17	\$100,350	95.5%	\$173,469	172.9%	17	\$31,890	\$37,329	\$441,816
2020-21	1,983	\$253,600	81.5%	\$326,664	\$164.73	128.8%	5	\$83,125	81.5%	\$219,499	264.1%	8	\$56,652	\$105,956	\$708,771
2019-20	2,053	\$283,365	86.2%	\$353,131	\$172.01	124.6%	5	\$98,825	84.6%	\$208,143	210.6%	14	\$23,841	\$532,862	\$1,117,977
2018-19	2,097	\$309,475	89.6%	\$367,312	\$175.16	118.7%	3	\$102,080	86.6%	\$116,460	114.1%	12	\$28,480	\$97,630	\$609,882
2017-18	2,155	\$260,628	68.7%	\$398,211	\$184.78	152.8%	6	\$70,918	65.7%	\$106,384	150.0%	14	\$28,238	\$102,721	\$635,552

**Other Funds include term/directed gifts and funds for approved grants.

Annual Fund Measures



Year to Date (YTD) covers the period from July through March.

Recognition and Endowment Measures

	PHF	Bene-factor	Bequest Society*	Major Donor*	Major Gifts	EREY Eligible	Sustaining Member	PHS Eligible
All-time	8,133	198	79	199	--	--	--	--
2021-22	136	2	2	14	7	602	454	79
2020-21	239	2	1	16	7	937	782	128
2019-20	232	3	2	11	8	1,131	882	121
2018-19	269	8	4	13	6	1,307	1,145	118
2017-18	269	2	1	10	6	1,261	1,016	117

Yearly breakdowns include both new qualifiers and recognition level changes

Paul Harris Society Members: 102 **Rotary Direct Participants: 74**

Total Endowed Funds: 13 * Joint Major Donor/Bequest Society counts as one.

Market Value: \$3,890,150

Market Value Date: 31-Dec-2021

Foundation Recognition Points: 86,031.97

EREY (USD 25 starting in 2016-17), Sustaining Member, and PHS Eligible includes all individuals, not just active club members.



Engaging Rotary Members in The Foundation



FOUNDATION RESOURCES

- Rotary Club Central
 - Club and District fundraising reports
- Rotary Support Center
 - RotarySupportCenter@rotary.org
 - +1 (866)-9ROTARY
- District Leaders
- Rotary.org
- My.Rotary.org

