DISTRICT 5010 FUNDRAISING ANALYSIS
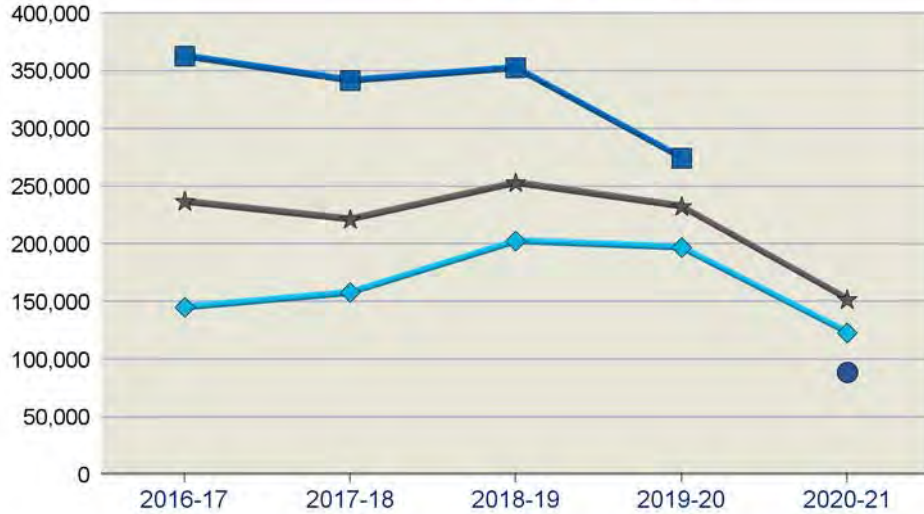
INTERIM RESULTS FOR JULY THROUGH JANUARY 2020-21

	Number of Members	Annual Fund Goal	% Goals Received	Total	Per Capita	Goal Achieved	Non-Giving Clubs	PolioPlus Fund Goal	% Goals Received	Total	Goal Achieved	Non-Giving Clubs	Other Funds** Total	Endowment Fund Total	Total Giving
2020-21	1,546	$152,100	55.3%	$123,111	$79.63	80.9%	8	$30,250	52.6%	$90,230	298.3%	10	$3,150	$704,777	$921,267
2019-20	1,653	$232,625	71.1%	$274,416	$166.01	118.0%	2	$44,128	71.1%	$160,855	364.5%	2	$8,822	$16,938	$461,031
2018-19	1,707	$253,149	75.0%	$352,723	$206.63	139.3%	6	$47,870	70.0%	$71,632	149.6%	8	$38,712	$16,895	$479,962
2017-18	1,731	$221,435	80.0%	$341,667	$197.38	154.3%	1	$49,985	72.5%	$73,188	146.4%	11	($6,900)	$32,350	$440,305
2016-17	1,720	$236,816	92.3%	$362,870	$210.97	153.2%	2	$47,175	89.7%	$71,600	151.8%	11	$2,900	$13,493	$450,863

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

Annual Fund Measures

- ■ Annual Fund Total for Previous Years - 30 June
- ◆ Annual Fund Year to Date - All Years
- ★ Annual Fund Goal Amount
- ● Goal Benchmark Year to Date

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

Recognition and Endowment Measures

	PHF	Bene-factor	Bequest Society*	Major Donor*	Major Gifts	EREY Eligible	Sustaining Member	PHS Eligible
All-time	**3,436**	**313**	**98**	**163**	--	--	--	--
2020-21	94	0	0	9	3	538	362	37
2019-20	223	1	1	10	5	904	594	83
2018-19	301	9	8	8	4	944	632	101
2017-18	237	1	1	11	4	1,024	814	102
2016-17	350	3	1	15	2	1,182	804	109

Yearly breakdowns include both new qualifiers and recognition level changes

Paul Harris Society Members:	39	**Rotary Direct Participants:**	73

* Joint Major Donor/Bequest Society counts as one.

Total Endowed Funds:	2
Market Value:	$775,778
Market Value Date:	31-Dec-2020

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

Foundation Recognition Points:	5,474.55

Recognition/Reports: Rotary Support Center   (866) 9-ROTARY or (866) 976-8279   **RotarySupportCenter@rotary.org**

Data as of 1-Feb-2021   *Anonymous Donors are not included on recognition breakdown*   DistrictFundraisingAnalysis R00090M.2007

AVAILABLE DDF BY DISTRICT

For District 5010 In Program Year 2020 - 2021

Transaction	Description	Amount	Balance
50% of Annual Fund Share contributions from 2017 - 2018		$164,654.60	$164,654.60
50% of Available Endowment Fund Share Earnings		$999.08	$165,653.68
Carry Forward from 2019 - 2020		$75,909.90	$241,563.58
District Transfer	To District 5370	($7,439.80)	
Transfer	To Polio Plus Pool	($35,000.00)	
Transfer	To Rotary Center for International Studies	($25,000.00)	
Total DDF Transferred		**($67,439.80)**	**$174,123.78**
Project Funding	DG2115303	($89,313.00)	
Project Funding	GG1986784	($3,000.00)	
Total DDF Funding		**($92,313.00)**	**$81,810.78**
Returned Funds	DG2090511	$238.00	
Total DDF Returned Funds		**$238.00**	**$82,048.78**
Actual DDF Balance			**$82,048.78**
Pending Allocations	GG2097818 Authorizations Required	($31,000.00)	
Total DDF Pending		**($31,000.00)**	**$51,048.78**
Unallocated DDF Balance (Estimated)			**$51,048.78**

6-Feb-21

District Foundation Committee Report

(New members for all commitees are welcome if you want to help out)			Entered	As of January 31, 2021		District Grants for 2023-24
Areas of the Foundation Committee			Club Goals	Year to Date Contributions	Year to Date Expenditures	1/4 of $128,111
A	Fundraising (money in -EREY, Rotary Direct)					If no more is raised
	a.	Annual fund (fundraising is very low = Low District grants in 2023-24)	$152,100	**$123,111**		**$30,778**
	b.	Polio Plus	$30,250	$90,230		
	c.	Endowment Funds		$704,444		
	d.	Planned Giving/Other		$3,150		
		Total contributions		**$920,935**		
B.	Support for Causes (expenditures)					
	a.	District Grants	(applied for and allocated to Clubs)		**$89,313**	
	b.	Global grants	(Match for Club Contributions to large Int'l projects)		$3,000	
	c.	Scholarships-Apps due now	(Allison Furniss finished June 30, 2020)		$0	
	d	Intl Peace Centers	(annual donation)		$25,000	
	e.	Polio Plus	(annual donation of $35K plus amount raised)		$125,230	
	f.	Vocational Training Teams (on hold for Covid-19)			$0	
		Total expenditures			**$242,543**	
C.	Other					
	a.	Donor Recognition				
	b.	Alumni	(tracking of past participants)			