

**Club Spring Training Experience (CSTE-2021)**

**"Talking Points & Results"**

*Modified 2021-05-05*

***NOTE TO USERS:*** The notes contained in this document are for both years that we have run this format for our spring training session with multiple breakouts. The **Table of Contents** below is **ACTIVE**, which means you should be able to click on any entry and go directly to that page.

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# Agenda:

* There were 3 CSTE breakout sessions with 11 topics on Saturday 1 May. Each was at a separate Zoom link and hosted by 2 district facilitators and found at the CSTE pages under “Training” on the district website (rotary5060.org).
* The program was...
  + 9:00-9:55: Breakout Session (1)
  + 9:55-10:00: Log out & go to second breakout
  + 10:00-10:55: Breakout Session (2)
  + 10:55-11:00: Log out & go to third breakout
  + 11:00-11:55: Breakout Session (3)
  + 11:55-1:00: Break
  + 1:00-2:00: Club Planning Session: Plans for 2021-2022!

# Breakout Topics:

1. **Club Leadership** - PE's, VP's & others who want to lead your club.
2. **Club Secretary** - Come prepared to discuss "best practices" for keeping your club organized.
3. **Club Treasurer** - What are the essential tasks.
4. **Membership** - As membership declines in North America, this is more important than ever.
5. **Public Image & Marketing** - Not just telling our story, but *inspiring* non-Rotarians to take an interest!
6. **The Rotary Foundation & International Service** - Part of the heart of who we are and what we do.
7. **Community Service** - The other half of our Core Value of Service!
8. **Fundraising** - After a year of pandemic shutdown, we definitely think about this differently!
9. **Youth Services** - We've been missing Youth Exchange & RYLA.  How best to get this going again.
10. **Adapting to Grow Rotary** - Innovation is the key.  It's a different time, and people have different needs.  For Rotary to grow we need to adapt.
11. **Rotary 101** - A general discussion of the basics of Rotary.  What we focus on depends on who comes to the table, bring your questions!

# Participation & Results:

* In 2020 there were 342 registered attendees
  + 48 of the 58 clubs in District 5060
* In 2021 ONLY attendees that participated in breakout sessions were measured:
  + 225 participants, 164 of which attended 2 or more breakouts
  + 36 of 58 clubs participated
  + 5 clubs had 10+, 4 more had 9 participants
* Talking points, best practices & suggested action items all summarized and available for download from [rotary5060.org](http://rotary5060.org/)

# Morning Breakouts:

* Each ~55 minute breakout session is intended to achieve the following goals:
  + Discuss key issues important for the session topic as related to running more effective Rotary clubs, often starting with “talking points” provided by the facilitators.
  + Develop "classmate" relations with others with similar interests or responsibilities from other clubs in the District.
  + Develop a list of "best practices" for the session topic.
  + Refine and grow the key "talking point" list for future discussions.
* There is a Zoom-Meeting Host (Facilitator) assigned to be the "Table Leader". The table leader role will be to:
  + Make sure the conversation stays reasonably on topic.
  + Make sure that all opinions are respected.
  + Make sure that all at the table participate as appropriate.
* Keep a record of the breakout meeting primarily of two things:
  + (a) "Best Practices" and actionable recommendations that can be shared with all clubs. These are short, simple, good ideas!
  + (b) Any changes (additions or deletions) to the "Table Talk" points for future meetings.
  + All of the above will be shared on the district website.

# Club Planning Session (suggested 13:00-14:00):

**Background:**

* The afternoon breakout session objective is to have CSTE participants gather by club and to begin addressing key priorities for the start of RY 2021-2022.
* The exercise needs to promote team building and transition of the incoming club leadership teams into a dynamic new Rotary Year.

# Facilitator Contact Information

|  |  |  |  |
| --- | --- | --- | --- |
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|  |  |  |  |

# (1) Leadership

2020 Facilitator: Susan McIntyre

2021 Facilitators: (1) Susan McIntyre & Maria Hudolin,

(2) Cindy Piva & Jim Chamberlain,

(3) Anna Harrison & Rob Tidd

## Talking Points:

1. How do you stay organized with people coming to ask for time on the agenda, special requests, getting their connections on the agenda, remembering when there is something special to acknowledge, etc.?
2. How do you make meetings engaging?
3. Every year the new Board needs to prepare for their new roles and understand where the existing Board is coming from. How have you helped this process?
4. What are the challenges with using ClubRunner, My Rotary, file sharing (i.e., Dropbox, Google Drive)?
5. How to engage people now and reduce attrition (Zoom meetings), new ways of engagement – what ideas have worked – agile ideas.
6. How would you like to change Rotary?

## Notes from 2021:

### Session (1): Susan & Maria

**Learn.rotary.org -** [**https://learn.rotary.org/members/learn/catalog/view/67**](https://learn.rotary.org/members/learn/catalog/view/67)

* On-line learning courses

**Newsletters –** [**https://my.rotary.org/en/news-media/newsletters**](https://my.rotary.org/en/news-media/newsletters)

* Many types, including Rotary Leader

#### Communication tips:

* Phoning is very effective for reaching members (better than text or email)
* One club calling people who have not been attending – bring them up to date. Has resulted in bringing back two people and two new members. Grateful for information.
* Meeting is recorded and recording sent out to membership to view later
* Membership phone out system – call and tell them what is happening
* President sends reminder – recap after meeting – Whatsapp – talking between meetings
* Weekly newsletter details all of the meeting and attachments
* Recap speaker – FB page and Clubrunner

Zoom:

* Amazing job with Zoom meetings – attendance higher with Zoom and also because strong executive team
* Core of members resisting zoom
* Walking club – walking around the world – extra things to connect with people
* Comraderie -competition little ways engaging people
* Zoom socials – Christmas, St. Patricks
* More attendance by zoom – flexible – continue hybrid format

#### What leadership styles – what qualities would you use?

**Would you change leadership style?**

Incoming into Leadership – change or not

* Keeping programs as engaging and interesting as possible
* Engaging members during zoom – have them take part in the meeting
* Group – not participating communicate with them – notes helpful
* Being organized and communicating in advance – what to expect
* Additional social components

Plan on doing a survey 2018 – club satisfaction survey

* Look at this again
* One year covid what club needs now – update
* Vision workshop – what their vision is – where club wants to go
* Exec will do SWOT
* Help with my goals and strategies and action plan

Survey about returning Yakima – go back to meeting in person

* Convention center – big space and spread out
* Large club 300 members 80% wanted to come back as long as vaccinated
* Start hybrid May 20th – testing equipment
* Lot of ongoing activities
* Pivoted to Zoom or smaller groups – distance groups
* pretty amazing speakers would not have had otherwise – foreign exchange students, leaders in Rotary in Toronto or wherever
* Programs set for next year 1/2 people speaking from somewhere else – some engaged

#### Communication

* Surveys by core – 25% participation
* Back to hybrid model – people appreciated getting a phone call
* Moving ahead as membership committee gets reinvigorated, old technology – something return to – gives you a pulse you would

#### How would you encourage leaders in Rotary?

* Newer members give some kind of small task or big task asap
* First joined going to meetings fine, but did not get to do much until voluntold and then you get a chance
* Committee chairs coming year – people who had not been chairs before – get a chance to do some things
* Vice chair – have 32 committees – some could not do much
* Social – do number events in year – traditional and others

**Mentor – find out what their passion is – we look at that**

* Current president Chris Davis – mentor gets asks Chairs to invite new member to sit in on committee – possibly they might choose one
* One member walked in and game for anything – put hand up for everything – others don’t want to do

Breakouts during regular meeting – committees in breakout rooms

One club told us: Rotary is shared leadership not just President – all members have a leadership role – all members part of the leadership – more proactive – new members have taken on leadership capacity

* Recast that vision – new member coming in – old guard time to step up and try new things

#### How are you re-engaging old guard?

* President’s council – giving some thought – not regular separate meetings – engaging that group of people all the good ideas
* Way to keep them involved w/o assigning specific positions
* approach people who have been there a long time -go to them ask them for their experiences? How did you do it? Help me answer these questions – what works, what does not

**Start the meeting well in advance of the meeting time – want to talk -could we**

* Rotary NOW many professionals in club – 1 hour meeting – some members stay on and keep chatting – glass of wine or beer – social interaction
* Virtual zoom socials as well – Christmas, St. Paddy’s – re-engage Fellowship very important
* Fellowship/chat time before meeting – zoom
* Some of members coming earlier – have bit of time
* Newer members doing anything different to engage and get to know some older members
  + Important get some older members as part of committees
  + Pull out information
  + 4 members have long history for Rotary – ask them their experience and worked well for us
* Eric – older member – when want to join – goes to breakfast goes through
* Try to get on – will go to 2 members
* Happy sads – sheriff program –
* Rotary jar – put their fines and other loose change to collect $ for mason jar with Rotary Stickers

### Session (3): Anna & Rob

**Contacts/Resources:**

**Learn.rotary.org -** [**https://learn.rotary.org/members/learn/catalog/view/67**](https://learn.rotary.org/members/learn/catalog/view/67)

* **On-line learning courses**

**Newsletters –** [**https://my.rotary.org/en/news-media/newsletters**](https://my.rotary.org/en/news-media/newsletters)

* Many types, including Rotary Leader

**Leadership**

* Requires strong and engaged board members
* Struggle to motivate members to be involved
* Inspiring
* members
* Planning
* How to keep members engaged in these times
* Need to encourage members to speak up so we know what they are thinking
* Delegate and stay out of the way, the leader can’t do everything
* Personal approach call people by name
* Give up control
* President should steer the ship and let everyone else do their jobs
* Leadership does not need a title
* Be the visioning champion
* Encourage participation

**Long term challenges:**

* Engagement in meetings
* Engagement in events and projects
* Email responses are low
* To many emails and some are not getting read
* Getting involvement via Zoom is not the same as in person, in person people signed up together to do a project.
* How to encourage members to get involved

**Suggestions:**

* To help with Zoom fatigue hold the committee meeting during a regular meeting, use breakout rooms
* Small group discussions are missing, come up with a way to encourage this
* Use breakout rooms more often in meetings it encourages fellowship, have activities in the breakouts example as a question Like what could possibly go wrong if……………………… or What is the craziest story you have or Trivia questions Then each break out would come up with the best answer to the question and share this with the entire group
* Use Zoom effectively to do happy/sad bucks, this gets everyone involved (use a Venmo site to collect donations)
* Figure out ways to come along members
* Have a greeter/Zoom champion
* Have a fellowship chair

**Emerging Leaders**

* Have a mentorship program
* Vocational mentorship
* Shadow a board position for a year

## Notes from 2020:

### Key Concepts:

* My business has been affected by COVID and our club’s ability to fundraise has been challenged. We are going to focus on service and use our time, expertise, connections, and knowledge to improve our community. People of Action – through service. May not be able to work side by side, but can support local businesses
* Contact past sponsors and ask what can we do to help? How can we support them? Rather than supporting the homeless
* Reinvigorate the image of Rotary – ask what is important, what do you need?
* Provide service – Women’s shelter – work parties, hands on – landscaping, fence painting
* Send letter of support to past sponsor – ask what can Rotary do for you?
* One club believes in adding value to their clientele (our membership). They are putting hands on people by having board members contact each member and asking a. how are you doing? and b. what can we help you with (financial, health?). Some need help and we are doing what we can – connecting people to local resources.
* Older members who may not have the technology and may need help with zoom. One club had a member with an extra camera. He dropped if off on the porch and then guided the other member through the installation process. Creating a Tech Team to visit members.
* New members plan and run a meeting (Acting President) as part of their duties to complete their passport. They have to plan the whole meeting, speaker, agenda and then physically run the meeting.
* Membership Monday on Facebook page: created an image, post new person every week. The person provides the standard information and a photo of themselves (with their kids, their dog). They talk about what they love about Rotary, why they are in Rotary and invite people to come to Rotary with them

**How to engage people now and reduce attrition (Zoom meetings), new ways of engagement – what ideas have worked – agile ideas**

* Must continue every aspect and every way possible to continue meetings (humour, respect, achievement)
* Hybrid meetings
* Engage members to donate money they would have spent on other things such as a charity that you have supported that you bring to speak at your meeting
* Zoom meetings enable working people to attend and still do work at their desks
* Zoom meetings: seeing people be Zoomed out. Daytime meetings seem harder to get attendance – better with morning or evening sessions
* Every Friday have a social distancing social on some driveway or by a pool with 6 people – emphasis on the fellowship
* Zoom has been great tool to bring people together to brainstorm
* Starting meeting early and letting people socialize for ½ hour before meeting and then ½ hour after meeting
* Keeping to traditional meeting format with guest speakers
* On-line trivia night as fundraiser and social event
* Bring on past exchange students
* Bring on partners for Global Grants – they can talk about the project and how things are going
* You can hear from more people through Zoom
* Some members have a much bigger job as a result of COVID-19 in running their businesses and cannot attend meetings. Keep in touch and make sure they know you are there to help them
* Holding regular socials via zoom. Should do with all clubs so everyone can interact
* Feel like on Zoom we sit at the same table – more equal
* Zoom make meetings more productive
* Can invite speakers from anywhere in the world – don’t be afraid to ask people
* Zoom has increased attendance. Provides access to snowbirds and people out of town for work – plan to have one Zoom meeting per month when face-to-face meetings return
* Had a reverse parade for local charity, showing the community our support for them
* We may switch to a virtual club as we are having a hard time finding a venue we can meet at. Have already been to 3 different places. But we have a social bond and like to meet at the pub and do things together
* Use Zoom Agenda to get decisions made – less chit chat
* Concern that Zoom does not retain Rotary Fellowship and friendship – which is why people join Rotary – scared all Zoom would lose more members
* Getting social contact by delivering Save-on Cards to members (fundraiser)
* The whole program (music, invocation, sergeant at arms, etc. The tech people record and put on YouTube. Normally 180-200 people attend. On Zoom, less than 100 coming.
* One club starts with dialogue or chit chat for the first ½ hour. 25-30 out of 55 show up for the meeting and a dozen show up early to talk to one another.
* Some members are sending dollars not spent on meals at meetings to Treasurer via e-transfer
* WhatsApp being used by virtual club to stay connected between meetings – chat with each other and no one is left out
* Some members are resistant to Zoom – have offered to go in (sanitizing) and help set them up – personal touch
* Held Birthday party in a local park – capped at 50 people and did not allow spouses. Kept people 6’ apart and everyone brought own food and beverages. Thinking of doing same for installation event. Negative no partners.
* Positive for some, negative for the senior crowd. Hold committee meetings via Zoom. Membership concern will lose members. Have to encourage them to stay and hang on.
* One member is looking after his wife so cannot attend meetings. We visit him
* Invite other clubs to hear speaker
* Shorten meeting to 45 minutes to 1 hour to reduce Zoom fatigue
* Held live cooking class with professional cook (wife of a member) and cooked with her
* Change up the program (ideas: tacky tourist, bad hair day, crazy shirt day, bring a pet to Rotary …)
* End on time – respect people who have to be at work
* Malcolm (Mac) Paterson – Penticton Sunrise has done presentations via Zoom to 6 nations – Also recommended by Salmon Arm who held joint meeting of all Salmon Arm, Revelstoke, and Chase clubs when Mac spoke
* Look at District Website for videos that can be used as programs
* Other new and exciting things: inductions via Zoom, joint club meetings with other clubs in your community – once a quarter get multiple clubs together to do initiatives, coordinate timing of fundraisers (so not asking the same businesses to donate to Rotary)
* Invite a member of another club to attend your meeting. At the end get them to say a few words. Get closer through Zoom
* “Never miss out on a good crisis – Winston Churchill”
* Some regulars never show up – intimidated by the technology. Take time to help them. Some do not have computer. We gave them a phone number and they can call – we cannot see them, but they can hear and speak.
* Holding Friday afternoon social. Everyone has a drink.
* TGIF Social held via Zoom
* Social fellowship via Zoom
* Should develop work parties to keep in contact with members
* Working parties via Zoom – i.e. man phones for a telethon
* Get new members to give you ideas on membership
* Need to engage members to keep them – support local businesses – joining local clubs
* Look within your club for local businesses to support – do our best to reach out and support them
* personally, call people for engagement. Emphasis on the areas of focus, and bring smaller groups of people such as 20 or less to meet at a café, do some community service, or plan an International project
* Penticton are using social distancing and delivering lunch to members
* We expect to lose 30-35 members and then need 40 new ones a year. How can they engage them early?
* Orientation used to set expectations and get feedback. The sponsor takes the person by the hand and invites them to socials, lunches and makes sure they get incorporated into the club
* Another club uses the red badge system to engage new members: they act as greeter, visit a Board meeting, have coffee with a Board member (etc.) before they get a new badge
* Another club has new members assigned to an older member as more than a buddy system. They have 8 things they must do together. The process is connecting and task oriented.
* One club is sending birthday cards in the mail to their members
* Using “You Rock” cards to send to members to appreciate them
* Inviting engaging speakers to the meetings
* Some record Zoom meetings and share with those that were not present
* One club has shifted the time of their regular meeting to an evening time period. They have covered different topics from pets, how to give haircut. They are seeing members who have not been coming to in-person meetings
* One person suggested using the TED talk format to cover Rotary material at a meeting
* Look for ways to engage – hands on project may be hard to do but schedule something to keep people connected
* One club invited past students to attend the meeting and that increased overall attendance as members wanted to reconnect
* One club uses Spotlight, a weekly publication to highlight their meetings
* One club has a work trailer full of tools and plans to get a hands-on project going ASAP. Work projects are a big draw and they want to set a goal
* One club has new members plan and run a meeting (Acting President) as part of their duties to complete their passport. They have to plan the whole meeting, speaker, agenda and then physically run the meeting.
* When asked, how do I quit Rotary, one member realized they needed to get this person involved before she decided to go. She took the person to a Scholarship dinner at a Rotarian’s home. This was what bonded the member and she has stayed and is a very active member

**What are the challenges with using ClubRunner, My Rotary, file sharing (i.e., Dropbox, Google Drive)?**

* Use Clubrunner email to create messages and time delay them to be sent out automatically
* Set up Committees and can email them
* Google Drive for Non-Profits: In Canada apply through TechSoup Canada to obtain proof/qualification for non-profit status. Then apply to Google for Non-Profits for account. 1 MB free storage and email addresses. They also provide free AdWords – this is another application process.

**Every year the new Board needs to prepare for their new roles and understand where the existing Board is coming from. How have you helped this process?**

* We often ask people to do jobs but do not tell them what is entailed. Had Interact student write job descriptions for all positions
* Use MyRotary to give direction and help to understand the role of the Board of Directors. Want those guidelines in advance to run meetings more efficiently
* Looking forward to doing strategic planning, addressing Mission, Vision and making a plan for the club
* Would like to have JD and roles as part of plan
* RI training on website or MyRotary
* One club has co-treasurers and co-secretary positions so there is backup
* The agenda is sent out to every person who will participate in the time period. President is the timekeeper. Sent out in advance with time allocated so everyone knows.
* Send an email to the speaker in advance so they know the format
* Board retreat on Zoom (agenda, budget, what are you responsible for, what do you need from me?)
* Reaching out is a team effort. People need to participate in spots (multiple times in roles on Board and/or President)
* Mentoring handbook available on District 5060 website: under download files (left side)

**How would you like to change Rotary?**

* Let more people know what we do – we do not brag enough
* In some communities, you cannot go a mile without a sign or some recognition
* Tell our stories
* New Aquatic center has huge Rotary wheel

### Resources:

Mentoring Manual: <https://portal.clubrunner.ca/50005> scroll down left to Download Files

Role of President: <https://my.rotary.org/en/learning-reference/learn-role/president>

TechSoup Canada: <https://www.techsoupcanada.ca/en>

# (2) Club Secretary

2020 Facilitator: Joyce Ericson

2021 Facilitators: (1) Kathryn Battrum & Joyce Ericson,

(2) Julie McCoy& Joyce Ericson,

(3) Cindy Piva & Maria Hudolin

## Minimum suggested by RI

**(in the "Club Secretary's Manual" 229-en-512 and** **RI website:**  https://my.rotary.org/en/learning-reference/learn-role/secretary

*"As club secretary you help your club run smoothly and eﬀectively. You also monitor club trends to help identify strengths and areas for improvement, and share this*

*information with club and district leaders.*

***What you do***

*Maintain membership records: Update your club membership data. Your club invoice is*

*based on the number of members in Rotary's database for your club as of 1 July and 1*

*January. Rotary International sends the club invoice by email and mail. Save paper by opting*

*out of the paper (mailed) version.*

*Maintain minutes of club, board, and committee meetings*

*Work with incoming secretary to ensure smooth transition*

***How to prepare***

*Take online courses for club secretary in the Learning Center*

*Attend district training assembly*

*Work with outgoing secretary"*

*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\**

## Additional functions

* Assist and be a resource to the club president as needed
* Awareness of club bylaws and Rotary principles and guidelines
* Assist with end-of-year transition planning and details
* Assist with new-member orientation and welcoming
* Coordinate member transfers with other clubs
* Assist with annual meeting preparations, elections
* Provide agenda for meetings
* Assist with visual media for meetings
* Manage & prepare or ensure preparation of club newsletter
* Maintain club website (if not done by others)
* Purchase supplies as needed, such as new-member orientation items, pins and awards
* Maintain contact with district leadership and other local clubs
* Provide delegate credentials for conferences
* Attend district events

## Notes from 2021:

### Session (1): Kathryn & Joyce

**Comments/Questions:**

* Continuity in the Club Secretary position is important to the Club and the Board.
* One President takes notes at weekly meetings and distributes them to all members. Often becomes the foundation for the Club newsletter.
* R.I. rules have changed so that attendance is no longer mandatory therefore is there any need to note attendance on ClubRunner?
* Some clubs use the free version of ClubRunner versus the paid one. Some clubs are not using Club Runner at all. The free version limits what you can do. Cost for the paid version is based on membership numbers.
* How to keep up member information when not all members are computer literate?
* Who is responsible for sending out meeting agendas, President or Secretary?
* How to avoid the “ground hog day” experience when assessing what needs to go on an agenda?
* Is there standardization of folders and storing documents? Guidance from District would be beneficial.
* How will your Club transition from Zoom to face-to-face or hybrid meetings?

**Best Practices:**

* Consistent site such as ClubRunner or Google Docs to store all Club documents (electronic file cabinet). This would include all correspondence.
* Use ClubRunner to its fullest.
* For those using ClubRunner send out yearly emails from the membership profile menu which sends it directly to members asking them to verify their information. Changes can be completed by the Secretary.
* Secretary should provide a tentative agenda to the President at least a week before scheduled Board meeting and then President is responsible to send out the agenda to all members involved.
* Board meeting documents should be available to all Club members either by storing in the Cloud or on ClubRunner (member only access).
* There should be agenda and meeting templates available on the Cloud or ClubRunner.
* Preloading the next meeting’s agenda while taking minutes of the current meeting may avoid the ground hog day experience.
* Have District Training sessions or follow tutorials on ClubRunner in order to gain more confidence in the use of ClubRunner.

### Session (2): Julie & Joyce

**Comments/Questions:**

* It’s a pain when you can’t figure something out in ClubRunner.
* We aren’t doing a good job of tracking why a member has stopped being a Rotarian.
* Are the current categories descriptive enough or could they be improved?
* Some clubs use the free version of ClubRunner versus the paid one. Some clubs are not using Club Runner at all. The free version limits what you can do. Information does not roll up to R.I. Cost for the paid version is based on membership numbers.
* Should membership be part of the Secretary’s role or can it be pieced off? Is there a job description? Important that when a member leaves the club, their membership is cancelled and that RI is notified.
* Does every Club have a newsletter? Not all use this feature. Newsletter could feature where members interests and talents lie. Meeting minutes are included in newsletters in some Clubs.
* Some clubs have administration as a role which helps relieve the Secretary of a possible workload issue.
* Is attendance taking mandatory on ClubRunner? Not all clubs do this.
* What information should be in meeting minutes?
* Some secretaries/presidents record (video or voice) all meetings. This allows them to go back and seek clarification if necessary.

**Best Practices:**

* Contact Duane Monick or Frank Clifton who are very knowledgeable in ClubRunner. They are more than willing to assist.
* Important to keep data updated in ClubRunner, i.e. reason why a member has left the club. This data later be pulled by the District.
* By-laws, minutes etc. should be kept on ClubRunner.
* Develop a Secretary’s job description unique to your Club.
* Meeting minutes should clearly identify the motion and whether or not if is approved/carried.
* Any voice or video recordings from meetings should be stored either on the Cloud or in ClubRunner.
* Produce minutes as soon as possible after a meeting.
* Keep membership information as up-to-date as possible to ensure RI semi-annual fees are not being over-billed.

### Session (3): Cindy & Maria

**ROLE OF CLUB SECRETARY**

1. Record minutes of Board meetings
2. Maintain Membership records in collaboration with Membership Chair
3. Mentor incoming Secretary for smooth transition of role
4. Bylaws updating – ensure it is being done within the club

**Best Practices for SECRETARY (some may be done by Membership Chair)**

* Usually, a 2-year term for continuity
* Be aware of the workings of your club

**MINUTES**

* Do audio or video recording of meeting with permission
* Ensure motions get recorded properly for minutes and for presentation to club members – don’t be afraid to say “Slow down or hold on everyone – I need to record that correctly”
* Make use of a Consent Agenda where director or committee reports are distributed to board ahead of meeting so there is only discussion if questions are asked at meeting. Saves a lot of time.
* Some clubs use a Recording Sec. to do minutes of board meetings and some clubs even take minutes of their regular meetings or record them
* Use the meeting agenda as a template for the board minutes
* Who prepares the Board meeting agenda – president or secretary?
* Many clubs continuing board meetings via zoom
* Set-up Nominations committee to ensure the election of officers is done no later than Dec. 31st. Schedule it in late Nov. or early Dec.

**AGM** – schedule it and send out agenda ahead of time

**BYLAWS** – determine who is in charge – secretary or separate committee? Post them in CR so all members have access to them. Bylaws need to be updated regularly, especially now with so much electronic distribution of information. Secretary should be on the committee but not necessarily in charge of the bylaws.

**MEMBERSHIP RECORDS**

* Sec. should know the workings of Clubrunner (CR) – if you need help email these experienced Rotarians: Frank Clifton / Dana Koch
* Sec. and Membership Chair very connected – must determine who does what!
* Without a clear process, there can be a gap from when the new member is first proposed to when they are inducted and when they are added in CR and then invoiced by club treasurer
* Welcome email to new members and copy BOD
* Include prospective members in all club emails as they will not be in CR yet
* Members Transfers can be tricky: ALWAYS ASK THEM if they have been a Rotarian member in another club. Then ALWAYS search them out in the RI database for a RI# before adding them to CR. This will avoid duplication! You must call RI or email [datacorrections@rotary.org](mailto:datacorrections@rotary.org) to fix duplications and sometimes this can be a long process.
* Adding new members: After searching the RI database, it is best to add them in CR and then sync them – all their information will populate UP to RI. It doesn’t work the other way around. Synching is very important. If club does not use CR then go to D5060 CR and add members there.

**RECOGNITION** for your Club Sec. is so very important!!!!!!!!!!

## Notes From 2020:

On the Zoom meeting with me were Katie Atkinson (Wenatchee Confluence), Marty Blackson (Ellensburg Morning), Frank Clifton (Wenatchee), Carolyn Flory (Yakima), Aaron Haynes (Yakima Sunrise), Karin Kristjanson (East Wenatchee), Julie McCoy (Lake Chelan), Duane Monick (Yakima) and Ann Risvold (Upper Kittitas).

Aaron and Marty are new to the Secretary role but the remainder are well seasoned. There was a great exchange of ideas and best practices. It was a pleasure facilitating this session.

**Basic Practices**

* Value in having one individual serve in the role for at least two to three years (maintains continuity and provides assistance to new members on the Executive).
* Minutes of previous meeting, Treasurer and other reports, along with the agenda for the next Executive meeting are sent out with enough advance notice to ensure officers have time to read and prepare. ClubRunner app on phone has the ability to send text messages to some/all members advising of upcoming meetings.
* If by-laws need reviewing, form a sub-committee as Secretary doesn’t need to do all the work.
* Keep on top of membership. At some clubs, adding members is the job of the Membership Chair. One Secretary asks members yearly to provide updated phone/email information and then updates the information on ClubRunner.
* Register new members on Club Central first as this is where a membership number (new or archived) is given. From there, register on local ClubRunner site. Concern expressed by some that there is no clear idea of the way Club Central and ClubRunner connect. What is the relationship?
* New member information package could be given out by Membership Chair instead of the Secretary.
* Keep accurate records that are readily accessible. Consider digitizing old Executive and AGM minutes and storing on a USB. Perhaps a second USB copy could be given to another Executive member – “just in case”.
* Post meeting minutes (Executive and regular) in the “members” area of ClubRunner or club’s website.
* With advance permission given, recording club meetings (speakers) and Executive meetings can be used. This allows the Secretary time later to ensure all pertinent information is captured.
* Seek permission from guest speakers to post videos/recordings on club website/ClubRunner. One club has a You Tube account where these are downloaded.
* When possible, send out a weekly newsletter – this is a job that could be directed to a volunteer member.
* Ensure at least two (better if three or four) members are fluent in the use of ClubRunner or the club’s website.

**Reminders:**

* Duane is very knowledgeable about ClubRunner and can provide assistance to any Club Secretary – just have to ask!
* Not all members are tech savvy and know their way around the basics in ClubRunner so be patient and kind with them!

# (3) Club Treasurer

2020 Facilitator: Jordana LaPorte

2021 Facilitator: Jordana LaPorte

## Notes from 2021:

## Notes from 2020:

1. The position can be a demanding (and sometime unappreciated) job, could Co Treasurers work and if so how would duties be split? Bottom line, a collaborative approach to fulfilling the needs of a treasurer for the club aid in club retention and willingness to take on the position.
2. Many Clubs have developed Worksheets, Records Timeline, and Flow Charts etc to better monitor and control flow of funds but we have no mechanism to share a lot of good ideas developed throughout the District, how can this be addressed?
3. How can we share expertise within Rotary or from other organizations (ie work experience) to develop best practices
4. Many Clubs are registered Societies able to provide charitable tax receipts but it is a fairly complicated task. The charitable status can be lost by issuing receipts outside CRA guidlines. Perhaps a district sponsored group could assist or take over this function?
5. Very small club Treasurers face the realization that no one else knows or understands the process.  That means a check and balance system that satisfies the Treasurer that everything is in order and a “mini-reporting” system that is quick to read and easy for others to understand.

1. Another stumbling block is when signing officers change – it’s easier to get a mortgage than it is to change signing authority at banks these days.  Easier to be treasurer forever. How do others handle this or how can it be done easier?
2. Today electronic Banking is common - e-payments requested by several suppliers – tedious to do when 2 signatures are required.  Often means using one’s personal account or credit card which results in writing club cheques to oneself – could get awkward and needs good record. How can this be handled effectively and still maintain duel control on cheques etc.
3. Budgeting can be challenging particularly for new Treasurers, often with minimal imput from others and documents to work with – others must have budget sheets/information that could be shared – minimal training seems to be available – how could this be better addressed?
4. Many step into this role without much (financial) experience. As a smaller club, often have not 'invested' in a program or know what has worked effectively in the District. Sharing a more streamlined way (program) to make it easier to do and pass on would be helpful. How could such a process be implement or even if coaches were available would be better. It is not a 'simple' job!
5. Managing funds – a major responsibility – how should Bank Reconciliations be best handled – ideally probably by someone other than the Treasurer but for most Clubs not practical but should independent monthly review be undertaken and how?
6. Financial Statements – most Clubs probably have independent Financial Statements prepared but changing Accounting Practices is making it very expensive – can or should this be handled internally and if so how?
7. Gaming is a facet that needs a lot of knowledge, online work and vigilance in reporting! And the rules are always changing with them! Would it not be better if we had a few with more in-depth knowledge to guide others – everyone cannot be expected to know everything – how could it be better shared?
8. The treasurer has to have a complete handle on the club budget and everything related to any monies as changes and issues do crop up. We can't be expected to 'just write a cheque" without significant back -up. (and budget referral). Effective processes are probably in place with other Clubs but no mechanism for sharing.
9. The Treasurer is up on how to get the certificate of liability insurance as they may not change as often as the secretary.
10. We have had a debit card for both our club account and our Foundation account to try to reduce the number of reimbursements.   That has had its own problem with people turning in the receipts so you know when the debit has hit the account what it is for.
11. Are there any Canadian instructions/guidance regarding GST (when to register, on which items to charge GST and on what expenses ITCs (Input Tax Credits) can be recovered? A resource person knowledgeable about GST/PST/State tax etc would be an improvement – probably need a separate person for each side of the border.
12. Treasurer’s Training – what is available besides the Learning Center (RI) and the Treasurers Manual – suggestions?

# (4) Membership

2020 Facilitator: Marjolein Lloyd

2021 Facilitators: (1) Anna Harrison & Jim Chamberlain,

(2) Sherry Chamberlain & Susan McIntyre,

(3) Jordana LaPorte & Jim Adamson

## Notes from 2021:

### Session (1): Anna & Jim

**How to attract younger members?**

* Younger members attract younger members
* Be an active club
* Engagement members
* Have a good mentorship program so that younger members feel engaged and supported
* Listen to younger members and hear what they are saying that they want
* Hard to attract younger members when the average age is over 60
* Survey younger members or potential members to see what time works best for them to meet
* Engage exchange rebound exchange students
* What do under 40’s want from Rotary
* Hands on projects will attract younger members

**What age do you consider younger Members?**

* 25-30
* Under 40

Need to attract more women

Rotary is attractive because we are not an organization that is just asking for money. There is opportunity for hands on projects.

Rebound exchange student’s families

**Zoom is great but everyone is feeling Zoom fatigue**

* Only 1/3 of club members are attending
* Risk losing members that are not comfortable with Zoom
* Some members want in person only

**Suggestions**

* Divide the club into teams and have a bring a guest day, the team that brings the most guest wins something
* Give ongoing Zoom training, include Zoon etiquette
* Fellowship events
* Be visible in the community
* Send an email or letter to members with meeting highlights
* Do breakouts at meeting in smaller groups to encourage interaction
* Some members love the convenience of Zoom so Hybrid meetings will be necessary moving forward. Good technology is essential.

**Start calling members now to encourage them to continue with Rotary**

### Session (2): Sherry & Susan

What can we do as membership enthusiasts to recruit, engage and Involve members?

**How attractive and vital is your club?**

* How to recruit new members?
* Template for setting up on Zoom – Peter Schultz document -ask him to share it again
  + Request: Peter to make a Video that would physically buttons to push, details
* Tip – pick up the phone and call people
* Rotary groups – Rotary Hybrid group on Facebook: <https://www.facebook.com/groups/287835555517539>
* Engagement –
  + Socials – community service projects to get members involved
  + People need to be invited to come and put hands on something
  + Engage people through things they are interested in (walking around the world <https://worldwalking.org/login>, walking club, adopt a road program)
  + Bring in a member – can list or bullet point – really interested in literacy, youth exchange -next time somebody is responsible for contacting this person and get her hooked into - one big continuum – Rotarian people
* Engage them in first year – greeters get to meet people
* Club benefitted Osoyoos – former Rotarians from other clubs (retirement capital)
* Active on-line – gained 5 members this year – did recruitment related to the environment – reached out to environmentally conscious in our community – active committee (glass recycling)
  + Garnered their attention and one person joining
  + One person left because of environment focus
  + Actively recruit 20-year old’s – do environmental project
  + Younger generation likes to meet and get hands dirty
  + Rotary has to pivot – Zoom as opportunity – shorter meetings
  + Reach out to young people – all same old traditional format - Let’s be innovative
  + Texting young cohort – will not phone or email – all text
  + Need to crack the egg – get the 20 to 30 year-old’s engaged
  + Perception all we do is ask for $ - passionate giving time - $ don’t care as much about
  + Buying lunch – downward trend
  + New member Oliver – on this call – less than 10 brought 5 members up to 8 or 9
    - Like-minded wanted an opportunity to give back – change when we met Tuesday evening $30.00 dinner – 2 hours – your children – now lunch 12 – 1
  + In my 40’s – already finding generation gaps – a lot of how we do things would need to be updated
    - Focus like environmental sustainability
    - Junior chamber international great source to move to Rotary
    - Different look to younger target
    - Ideas for how
    - All members – what Rotary could do for them
  + Lake Country Rotary Club – 48 – already disconnect age group – older members in group
    - Gender equity
    - Extraordinary white group –need to show Diversity, equity and inclusion
    - Canada Research Chair – DEI <https://www.rotary.org/en/about-rotary/diversity-equity-and-inclusion>
    - should not be afraid of social questions
    - talk about these things

Eric – don’t think lot know what Rotary is – does

* Off putting - $
* Age gap big factor
* Highway clean up good idea to find new members
* July 4th event – Walwalla park – beer garden – meet other group sin the area

**Attracting Diversity?**

* Honouring Indigenous Peoples: <https://honouringindigenouspeoples.com/>
* Contact Sunrise Rotary: [greigmc@telus.net](mailto:greigmc@telus.net) Greig McPhee chairs our group and it is open to anyone to join.
* Sunnyside – good selection of Spanish population due to project their supported – helping kids in boxing and getting off street
* Take away money barriers – honorary members, corporate memberships
* Look at barriers – whiteness or money
* What can we change – can supplement costs or lower barriers to admission
* Challenge – don’t know about Rotary – engagement talk about Rotary – inroad
* Bruce – Chief Clarence Louie – Osoyoos Indian Band – corporate member – Chief is corporate designate – tough to get them to participate – met with regularly – coming on Zoom – project for 75th anniversary – mural to showcase last 75 years and how much diversity is there – multicultural. IndoCanadian, Spanish – diversity in community
* Engaging their cultures and helping them out
* Attracting members – expect people to come to us – younger generation - What do you have to offer that will make them want to stay? Hispanic people to come aboard on selection committees – get them working with Spanish students to give out scholarships
* Create relations and invite them
* Members parents of Youth Exchange students – easier to get them involved with interests in the things that you do.
* Need to share that and find people have similar causes/mindsets
* Participation increased with Zoom – not normally coming – keep using Zoom
* Interesting program – do from anywhere in world – former youth exchange participants
* Finding the community service within your club that engages a group in your club – meet current guidelines – invasive weeds – species – partner up with org and groups and having a day of action – connected with those groups – talk about Rotary – recruitment – age group – what Rotary contributes in the community
* Recruiting, engagement, retention
* Kinds of issues and activities that meet their interests
* Lost quite a few members – rebuild members – goals – target

### Session (3): Jordana & Jim

Barriers to joining a Rotary club were discussed:

* Don’t feel qualified
* Cost of membership
* Time committment
* No diversity/inclusion

Solutions:

* Better promotion of who we are, and who we want
* Seek out under-represented businesses, genders, and/or races
* Find ways to connect with what they are interested in, and then provide a way for them to get involved in a club event, project, etc. that satisfies their interest
* Have a presence in the community, with opportunities for others to ask about Rotary
* Eliminate required meals
* Change dues structure (discount for new members, married couples, younger than 40)
* Corporate and/or family memberships
* Honorary members
* Change meeting dates, times, length, number of meetings/week, etc.

Engagement/retention:

* Get new members on committees soon
* Socials with new members (personal invitations)
* Mentor program (match according to common interests)
* Interest groups (books and beer, bridge, skiing, motorcycling, etc)
* Zoom games and socials – get creative

## Notes from 2020:

### Topics for Discussion:

1. How do you encourage members to invite guests and potential new Rotarians to a club

meeting?

2. Are guests and potential new Rotarians able to find your club website online? If so, does it

convey a relevant and positive impression of your club?

3. What other resources does your club employ to attract new members?

4. How and when to “ask” a guest/potential new Rotarian to join your club?

5. How does your club get new members immediately engaged in your club?

6. Do you have a mentorship program for new members? If so, is it working?

7. How does your club engage seasoned members in club committees and activities?

8. Does your club have a person or committee that contacts members who have been absent for a period of time?

9. Does your club send out surveys to club members for member feedback (i.e. programs,

fundraisers, volunteer events and other fun activities)?

10. If a member leaves your club, do you do an exit interview to find out what your club could have done differently to keep that member in Rotary?

### Making the first ask to a guest

Membership operating manual (so you are not re-inventing the wheel everytime the club has a new Membership Chair)

Socials are a great way to invite new guests

Recruitment is the first step - how do we get members actively engaged after that?

Co-chair positions to help the membership committee to balance the workload

Be sure that commitments are clearly spelled out so that there are no surprises

All new members bring a new guest in the red/blue badge program

Bring in a group of new members with similar interests/age at the same time

Invite past Rotarians to meeting

Reach out to former students

Invite student of the month to zoom, with principal and/or parents to meetings

We have a new member that saw our Rotary Food Drive success in April and came as a guest.

New members are those we have touched with projects

Talk about what you do in your club to your friends

-Low pressure to attend an online meeting as a guest (in your own home, not surrounded by strangers)

Brochure to new and potential members

Incentive program for current members to invite guests

- Keep track of guests brought in by members every quarter; member with most guests wins wine

Guests who have come to meetings prior to zoom

### Potential Members…now what?!

Interview with potential new member; take the potential members out for a socially distanced hike/walk.

Invite guests to help out at outdoor events

Don’t be afraid to set expectations

Former Rotarians who move into the area are great new Rotarians to your club! (R/C Osoyoos has had great success with this)

Instagram for younger members?

Recognition to members who are involved in posting online etc; a simple “thank you” during a club meeting goes a long way

Discounted dues for younger/new members…be sure the club is covering international/District dues

Info sheet to guests and potential members

-maybe include a 10 year re-cap to let the community know what you’ve done in the past and that you intend to stick around!

Speakers are often involved with clubs and could bring that info out and recruit.

### Keep a high profile in the community

We are still doing our Ribfest Raffle.

Concerts in the park with banners etc

“Hearts March” support essential frontline workers - wearing rotary shirts

Club can sponsor keynote speaker and invite public or special interest group

Be sure that website and social media are current

-share the workload; make sure there is more than one person able to edit/post, just in case someone moves or leaves the club…

Mention upcoming and recent meetings on social meeting so the community sees what you’re doing

Rotary shirts, pins, stickers (Penticton Sunrise has rotary facemasks that were made and donated by a local business/Rotarian)!

### Offer different types of Memberships

I read in a Rotarian about offering discounted membership for younger members for the first year. The joining fee can be a barrier for some. How about offset fees with volunteer hours commitment...

Corporate memberships - 3 individuals per membership

Note that a Club sets their own rules for spousal/corporate memberships

Invite potential new member to coffee for more information

Offer contact info of other members who may have similar interests to chat with potential new member

-Introduce new people to other who they may bond with

“Take the temperature” of potential new member

-might help to take the mystery out of the general membership

Does your club follow up on leads from Rotary International?

Wenatchee Confluence Rotary Board of Directors has discussed assigning each board member a group of members to stay in touch with on a regular basis as a means of keeping members engaged and connected.

### What do your online meetings look like? (There is no right answer here)

I like the idea of offering everyone a quick chance to check in.

How about sharing social isolation recipes??

Coffee meeting breakouts? 30 minute happy hour sessions to just gab?

Our ZOOM's are getting slowly more formal.

maybe every other meeting has a speaker? 30 muinutes one week for social, 60 minutes the next week...

We mimic our Zoom meetings like our morning meetings would normally be, with social, presentation, happy/sad bucks, and committee reports

That's a good idea, to opt in no tech people with paper info.

Spotlights on programs and members sent to non-zoom members via email or snail mail

Safe sharing zoom link; Password available by request...

We still do our new/weather/business reports and they have added graphics/share screen that members love.

Maintain some of your traditional elements at the Zoom mtg (greeter, gratitude)

Ask new members “what are the top 3 reasons you joined your club?"

### Who’s job is it to invite guests?

Task force committee - dominant members of the club who will go out to recruit members

Make rotary compelling, visual (whether at an in-person meeting or online)

New member socials

Get people into a committee relatively quickly, but not to overwhelm them

-Get people engaged right away

Let new members try something new right away

-Maybe a budget of $$$xxx for new members to complete a project - provides ownership

- I love the idea of project budgets for new members

### Challenges with Zoom meetings

Canceled speakers? How about fill with a focus time on local organizations that need immediate help

Fill time with current events in the community - ie. local nurse, update on farmer’s market

Pre-recorded speakers on zoom

Put up on You-Tube and Facebook page

Keynote speakers from District Conference are on the District Vimeo page

Our customer are our Rotarians

Follow up with those who are challenged with technology - offer one-on-one orientation

-contact Marjolein if you need help with this (email address at top of this document)

Be sure to contact those members you have not seen in meetings lately (that goes for online **and** in-person meetings)

### Mentorship program

Assign new member a mentor

-this is a great opportunity to re-engage some of your legacy members

Check in and follow up with the member/mentor relationship to ensure that it’s a good fit on **both** ends

As a mentor, what does the mentee want from me?

in with new member to ensure that new member is familiar with the Rotary lingo

Have a checklist of things to do - review club runner, attend a board meeting, go to a social etc

Ensure that new members of comfortable before moving to the next step

Have new member be the greeter for a few weeks (even if you’re still meeting online!)

New member helps with set-up

“Red ribbon” program, which helps to identify them

“To do” list for new members - fireside, attend a board meeting, front desk/ greeter duties, join a committee etc

Membership committee members can be mentors, but you can certainly go outside of that.

### Fun ideas to engage members and their families, too!

Children of Rotarians have their own badges - have a kids day at the club

Social fundraisers - trivia nights etc, often draws in the spouses

Invite former exchange students

An active mentorship program - a booklet or checklist of things to do (ie meet the president over coffee, attend a board meeting etc)

if we keep some form of zoom meetings, our members can be anywhere!

The Rotary Fellowship Programs are a great and inexpensive way to enjoy the Rotary Family

- here is a list of fellowships: <https://www.rotary.org/en/our-programs/more-fellowships>

Phone tree - going old school…love it!

Utitilzing “snail mail” (newsletters while meetings are online, for example)

Brainstorming ideas to physically re-engage

Remind rotarians about next week’s meetings

### When it’s just not the right fit…

Financial struggles - what can we do to keep members…just be sure that the club is covering international and district dues

Many of our communities have several Rotary Clubs to choose from; let’s play nice in the sandbox! If a potential member loves the concept of Rotary but not your club, let them know about the other clubs in the area.

-“I’d love to take you to one of the other meetings” or “Here’s the contact info for the President/Membership Chair of the other club in the community.”

Exit interviews with members who have left the club are vital

- Wait a few months before doing the interview, so that they have had a chance to think about it (you may find that you get a more honest answer as to why they really left)

Exit interviews - what did you like about Rotary, what interested you?

We have to be DOING things, or we will not compel others to join!

What are we selling, what is the value to joining our club and what are our expectations?

Like a tomato plant needs to be watered every day, think about those new members and how much attention they require to stay engaged

# (5) Public Image & Marketing

2020 Facilitator: Anna Harrison

2021 Facilitators: (1) Marjolein Lloyd & Rob Tidd,

(2) Anna Harrison & Guy Auger,

(3) Sherry Chamberlain & Joyce Ericson

## Talking Points:

* Does your club have a Public Image and Marketing director
* How can your club be more active in PI and marketing
* Are your public Image campaigns working
* Do you partner with other clubs to get the most impact
* Is social media important? How does your club use social media
* What can you do as a club to increase your presence
* How are you communicating, what platforms are you using
  + internal
  + external

## Notes from 2021:

### Session (2): Anna & Guy

**Contacts/Resources:**District PI Marketing: Sherry Chamberlain [sherry@adobie.com](mailto:sherry@adobie.com)  
Zone Coordinator: Marjolein Lloyd e: [marjolein.lloyd@icloud.com](mailto:marjolein.lloyd@icloud.com)   
www.Rotary.org / brand center  
Zone 28/32 Website: www.RotaryZones28-32.org  
Rotary Club Members: Public Image, Graphics & Ideas Hub: Search on Facebook <https://www.facebook.com/groups/1595163847383932/about>

**District 5060 News: Chair** Quinn Dalan E: [quinndalan@gmail.com](mailto:quinndalan@gmail.com) RC of Yakima

**Events:** Presentation on the new Marketing Campaign for District 5060   
Date: tbd.

**Tools and Resources**

* Tools and resources should be so much easier to find
* The RI website is so difficult to maneuver around
* Challenge is to find plug and play graphics
* Can the district purchase Canva or another Pro account for clubs to use for SM marketing?
* Have an easy to find location the has all the branding in one place
* Facebook has a donate button that clubs can add to their page

**Creating a good Image in our Communities**

* Involve the community newspaper
* Wear Rotary at work shirts
* Be visible when doing hands on projects
* Let the community know what Rotary is doing. Often, we do projects, and no one knows it was Rotary that did it
* Tents and Banners at events
* Youth exchange students ask the newspaper to do a feature story on the student at the end of their year highlighting what they did during their year
* Student of the month gives great exposure
* Tag people in posts it gets a bigger target market
* Black Press newspapers has as section on their website called DO SOME GOOD. Can send in stories or events that clubs would like featured in the paper

**All clubs should have marketing committees**

**NOTE:** Can the firm that has been hired for Public Image and Marketing include some great plug and play materials

**Do most clubs have a PI Budget?**

* This was not consistent with the clubs some do, and some do not
* Can’t do marketing without a grant
* For some there was no knowledge of the PI grant

**What does Rotary stand for in your community?**

* Has your club identified your WHY?

We should be more than a cheque presentation organization

* Be recognized for community events, work projects, and anything else that Rotary does in our communities
* Be a good community leader and promote other organizations events
* Need to change the Male, stale and pale image

What amount of the fundraising funds raised are designated for administration fees

* 0-10% for some clubs, many clubs did not even consider holding back any of the funds for admin. Fees.

Yakima Rotary does a great job in highlighting their members with their WHY Rotary campaign

**Have a focus**

* Use PI to attract younger members
* Demographics of members

**Suggestions**

* Make sure websites are inviting
* Use social media

Note: there was a lot of discussion around easily finding graphics and tools to support PI campaigns

## Notes from 2020:

* Use Public Image and Marketing to get new members
* Use Public Image for current members
* The main goal of social media is engagement
* Instagram is about the pictures
* Snapchat and TicTok is for the younger members
* Posts on Instagram can be shared on Facebook
* Rotapen thru clubrunner

### Training sessions for membership

* Incorporate a training session on technology for the alumni in our clubs
* Clubs could have a program that would show the members how to use social media
* Have all the members like your club’s page and then have them share a post
* One on one sessions to show senior members how to use social media platforms
* A Tech training session, if needed invite Rotaract to participate

### Marketing streams

* Websites
* Social media: Facebook, Instagram, Twitter, Linked in,
* Facebook live
* Instagram live
* Newspaper
* Newsletters
* Phone calls
* One on one
* Zoom meetings
* Linked in for businesses
* You tube

Comment: do not ask what can the media do for me but what can I provide the media

Use personal interest stories when sending out press releases. Make it interesting

### Suggestions:

* Canva.com or unsplashed.com easy design software to create your posts
* Use Facebook advertising it is reasonably priced and reaches a target market
* Paid boost posts on Facebook to increase the reach
* How to get clubs with older members to include social media – suggestion was to partner with other clubs or Rotaract Clubs to partner with
* Some clubs do not use Clubrunner so there is a challenge with sharing information
* Like Evan Burrell on Facebook
* Like the Facebook page Get the word out
* Facebook page Rotary Public Image graphics and ideas
* Domink Booney - Wenatchee Rotary
* Quinn Dalan – Yakima Rotary
* Like all the Facebook pages for clubs in our district
* Join your community Facebook pages (ask the administrator if you can post about Rotary events, what is Rotary, as well as any Rotary ads, get creative and target your posts based on the community that the page represents.
* Create an ad on YouTube <https://www.youtube.com/watch?v=sxgDwSto3mM>
* Use Facebook or Instagram Live to share your speaker’s message
* Use Zoom to do training videos on posting on Social media
* Partner with Toastmasters, younger members to assist with training
* Start a What’s App group for PI directors

### Frequency for ads

* Facebook 4-6 x a week
* Instagram 4-6 x a week or more
* Twitter 20 x day

# (6) TRF & International Service

2020 Facilitator: Sherry Chamberlain

2021 Facilitators: (1) Sherry Chamberlain & Kathy Butler,

(2) Richard DeRock & Kathy Butler,

(3) Jim Adamson & Peter Schultz

## Notes from 2021:

## Notes from 2020:

The two sessions were held and attended by 50 people total. Ideas to be shared included the following regarding TRF:

1. A few clubs hold annual Foundation dinners that allow the club to recognize new donors and multiple PHF recipients as well to educate the club about TRF
2. Rotary Foundation Chairs for the club have researched their members donations and history in order to find out who is close to a PHF and who has points to use for a PHF
3. Some clubs have a Polio donation can at meetings in order they can fundraise regularly
4. TRF fundraising envelopes have been placed on tables at club meetings
5. No one is fundraising online that we know of or are they promoting TRF online during this COvid19 issue.
6. I have asked the clubs to look at sending me successful District Grant project videos in order we can create a TRF Grant video used for promotion of TRF and the benefits to our local communities
7. We have informed attendees to look at their budget now to see if they can send in their TRF monies now
8. A club adds $25 to the club dues invoice that will be sent to TRF if a member chooses to keep that amount on the invoice. Members are billed quarterly $25 plus dues.
9. Presentations made in November to show members where TRF money goes
10. Resources include showing Vimeo videos on Rotary topics
11. Some clubs attendance at meetings online are successful and clubs are encouraging members to donate their meal costs to TRF
12. New member education regarding TRF: education at Firesides, TRF tidbits at most club meetings, promote monthly deductions using bank debit
13. Events for TRF: October 24 Polio Pizza night, Foundation Banquet night,
14. Transfer points for awarding PHF to special Rotary members and/or community recipients
    1. If awarded to a community non Rotarian: educate them on Rotary and TRF
15. Giving to the Canadian TRF – government will give back 45c credit – Stan Fike

## International Service Projects

After the TRF discussions we opened it up for International service projects and asked the question how a club determines an International Service Project.

1. RC of Kelowna and Kathy Butler will be working on the Kenya project again
2. Global Grant for Bangladesh project ready to go
3. District grant applications for local community projects encouraged as people are thinking closer to home these days
4. Encouraging clubs to do a video regarding their own District Grant for local community projects
5. District Chair for International Service Projects Carol Eamer encourages folks to cluster with other local clubs to collaborate on a project working together on the same project
6. A few clubs do not have an international service committee – some use their TRF committee for their projects discussions

# (7) Community Service

2020 Facilitator: Ron Hooper

2021 Facilitators: (1) Ron Hooper & Jim Adamson,

(2) Karl Ruether & Jim Pinnell,

(3) Susan McIntyre & Aleasa Tasker

## Notes from 2021:

### Session (1): Ron & Jim

* Considerations that need to be addressed before launching into new projects, including:
  + Is there a needs analysis;
  + Are there financial resources available or is a focused a fund raiser necessary;
  + Is the project eligible for a district grant;
  + Are/ will club members be engaged in planning and delivering the project;
  + How will the service project(s) be promoted and Rotary involvement profiled?
* Need to engage the community about what they want . The process of asking, and to be seen asking, about community need is important.
* Seek to determine how the club can be an effective partner.
* Pursue not just large projects but smaller projects that cumulatively make a difference in the community
* Design so that Rotary is an effective partner and is promoted as such.
* Clubs can also be of assistance to the community and partners, and not always the Rotary as lead.
* Pursue environmental projects in the community such as pollinator gardens or removal of invasive plants.
* An increased environmental focus can be used to engage members and attract new members – particularly important for attracting a younger demographic.
* Need to focus on the Public Image implications as delivering community service projects is an effective way to promote the Rotary brand and attract potential new members.
* The process of selecting projects can be used to energize members and to attract new members.
* A diverse range of specific projects were identified and used to illustrate the above considerations.

### Session (2): Karl & Jim

* Starfish Backpack
* Feeding school kids on weekend partnering with local food bank
* providing labor for COVID vaccination clinics
* Building a park by providing all the labor needed
* Chelan, Community work trailer with Rotary symbol parked at city entrance
  + provide wheelchair ramps, grab bars, other community requests.

### Session (3): Susan & Aleasa

**HOW DO WE RAISE FUNDS DURING COVID?**

* Linda – season of giving calendar / silent auction / orchard
* Tobi Byrne – selling puzzles – scenery
* Lynn Clayton – collecting bottles and cans - $50M per year income / they run the recycling centre
* Take-out food event is being held by one club
* Isabelle (Clearwater) – running a raffle for an e-bike / making money for a kids splash park – they’ve worked on senior’s gazebo / community gives their club ideas – ticket price is $10
* Janet (Peachland) – need to sell tickets locally unless to employ a company – some clubs use Trellis company
* Carol – Stay at home Gala (2hours long) was their big money maker - $100,000 – paid a professional to coordinate – used Trellis for auctions - took 6 weeks to plan - sold tickets cross Canada – included:
  + Live auction
  + Live Los Vegas entertainment
  + Silent auction

**HOW DO YOU SELECT YOUR COMMUNITY SERVICES PROJECT?**

* Penny – work with city to get input
* Linda – speakers sometimes give input
* Wendy – got input from members – discussed with group – they have a local impact grant committee
* MJ – use Google Forms to do surveys – get input from members
* Margaret – get a lot of ideas from municipality for picking service projects – never a shortage of projects in Lake country
* Diana (Leavenworth) – use committee to filter ideas and pick projects – working on playground
* Wendy – phoned everyone to get their input – club selected local and provincial projects this year versus international
* Bob (Penticton) – ideas from membership – outdoor projects are popular – even through covid

**HOW DO WE PROMOTE ROTARY THROUGH OUR SERVICE PROJECTS TO ENHANCE OUR IMAGE AND ATTRACT NEW MEMBERS**

* Rotary t-shirts are great
* Margaret - Social media – facebook/twitter, zoom platform has been good for attracting new younger members
* Thanking people on a public site is key very important
* Publicity on website and weekly newsletter is important
* Getting news-media to events is good
* One club has a pop-up tent with Rotary Logo on it
* RibFest did a great job of raising Kelowna Sunrise’s image
* One group mentioned partnerships – especially clubs working together in communities (to protect businesses from constantly being asked for sponsorship) and picking a service project ahead of time is crucial
* Bob – need to make sure your goals and values are compatible before joining up with a partner
* Tom – Sunrise used to serve beer at local football games – we partnered with another group because we needed 30 people with “serving it right” qualifications – made $10,000
* Margaret – helps Lake Country Theatre – serving drinks – wear our Rotary pins
* Linda (Kelowna Sunrise) – we do full monty projects to make money – yard projects – wear t-shirts – we sell the labour
* Wendy (Peachland) – pier in Peachland was a partnership project with Lions Club and city – great project

**OTHER**

* Susan (Sunrise) – government is restrictive on how funds are used
* Carol Eamer (Kelowna) – their club has money and looking for projects – send her your ideas (Linda has a project in Honduras with education that needs money) – Jaycee’s are a great group to work with – Carol sees the challenge being picking great projects to support -  not so much the money making aspect

## Notes from 2020:

### Considerations for Selecting New Projects:

* Members want projects in which they can “get their hands dirty” and come together to participate. Whenever possible, add a BBQ or something for fellowship and fun.
* Club is active with International Service projects but now looking for community projects that address local needs (i.e. mentoring troubled youth). Members want to be busy!
* In looking at future project, club is pursuing asking the community – similar to Mike Dedels approach in Kamloops (reference to District Conference Sunday break-out session. Session is on the District VIMEO site < <https://vimeo.com/412592219>>).
* Not always large projects, sometimes just need to look around, jump in and do things that are obvious.
* Timeframes for District Grants sometimes too time-consuming – prevents addressing obvious needs. Recognize that we need to adopt to a multi-year approach (Contact information for District multi-year planning support through Strategic Assistance <marjolein.lloyd@icloud.com> ).
* Re: collaborating with other clubs and not-for-profits – clubs are open to concept but difficult with multi-club participation without parameters and clear expectations.
* Have lots of small projects but need major project that is engaging with community partners - Yakima baseball facility with Rotary/ Kinsmen/ Lions signage is a possible model.
* Moving forward, need clear process to vet projects through membership and then take action. Discussion of the value of developing a 2- or 3-year plan and interest in the District’s approach.
* Consensus that the “needs analysis” requirements associated with successfully pursuing a District Grant are neither onerous nor unreasonable and that our District Foundation leaders are approachable and helpful.
* Hands-on projects are far more engaging to younger Rotarians than cheque-writing. Potential younger members want to know where a club is heading and so a plan with future community projects is a useful recruitment tool.
* To attract new and younger members, we need to be able to outline the club direction with community projects. So – we need to increase focus on communicating to the target community audiences through our website and, importantly, social media. As new member, the club projects, status and future direction is not as clear as it should be.
* Clubs need to actively promote community project involvement using social media. Advice given to not spread social media effort across too many platforms but to focus on one or two – do well and update regularly.
* While need to respond to circumstances surrounding COVID, need to plan for life afterwards and this is a good a time to develop implementation plans for projects post-COVID.
* Need to strengthen the culture that active participation in community projects is an important part of being a Rotarian.

### Community Service and COVID:

* With COVID need a quick community response but hard to do much more than support financially with isolation protocols. Need to now plan for possible responses to likely COVID return in the fall.
* Much of COVID response involves “writing checks” understandable but need to look beyond current situation.
* Fundraising is now limited by COVID response and future efforts need to be sensitive to economic recovery realities.
* Rotarians need to ‘dig down and serve their community’ – whether supporting the arts, environmental initiatives – but link into community core values and then just do it!
* This is a great opportunity to partner with other Not-for-Profits, including other Rotary clubs, and then continue those partnerships post-COVD.
* With COVID-related isolation, Rotary can support issues relating to mental well-being, domestic violence etc. Rotary should be ready to assist and meet community needs, particularly those at risk.
* We often forget that behind delivering new projects is the need for good administrative support and effective internal communication.
* Consensus that the “needs analysis” requirements associated with successfully pursuing a District Grant are neither onerous nor unreasonable and that Dave Campbell is approachable and helpful.
* To attract new and younger members, we need to be able to outline the club direction with community projects. So – we need to increase focus on communicating to the target community audiences through our website and, importantly, social media. As new member, the club projects, status and future direction is not as clear as it should be.
* Don’t forget that our fellow Rotarians are part of the community and we need to reach out to them – such as delivering a meal to members who are not attending weekly Zoom meetings.

### Fundraising for Community Service with COVID

* Clubs need to link fundraising on the basis of identified community needs – respect that many businesses and individuals are facing financial difficulties.
* Many community members want to support their community – so Rotary clubs need to find ways to consult and involve the community. This has benefits relating to not only addressing community needs but, also, maintaining awareness of the role of Rotary and perhaps even engaging future members.
* Many fundraising initiatives are cancelled or deferred – but a silver-lining in that clubs are forced to move beyond ‘cheque-writing’. We are forced to being ‘service-clubs’ that do work actively and safely. This is an opportunity, also, to deliver Rotarians leadership abilities in the community.
* There is an opportunity to actively and visibly give back to community businesses that have supported Rotary that are struggling with reopening and the economic recovery. A number of ideas including “Chefs in the City”, promotions for shopping locally.
* Can also support local businesses by not asking for donations but purchasing items for live and silent auctions – this is an opportunity to strengthen long-term relationships if done respectfully.

### Some Project Ideas . . . there were many!

* Kamloops 5-club Food Drive
* Rotary club matched foodbank donations
* Virtual Gala Dinners with partner restaurants and Rotarians deliver food
* Classic car rally
* Support local Blood Bank – Facebook promotion and provide refreshments to donors
* Chefs-in-the-City
* Graffiti clean-up – engage local artists
* Safe distance highway and trash clean-ups
* Support Women’s’ Safe House and other At Risk Community Residents
* Supporting local parks and heritage sites
* Car Rally with stops at local wineries and restaurants
* Local Drive-in Theatre sponsorship
* Donate Rotary weekly meal cost to foodbanks
* Online raffles

# (8) Fundraising

2020 Facilitator: Karl Ruether

2021 Facilitators: (1) Karl Ruether & Jim Hawkins,

(2) Marjolein Lloyd & Jim Hawkins,

(3) Guy Auger & Norm Brown

## Talking Points:

* What is the purpose for a fund raiser
* What is the monetary goal
* Other goals
* Fund raising ideas.
* Auction event with silent and live auction items
* Raise the paddle for a specific topic like Polio Plus or your l
* Desert Dash at auctions very successful
* Raffle Ticket sales
* Progressive dinner
* Art collection clean your attic auction
* bike ride
* Ribb Fest
* Any Legal considertions like a Gambling License
* What are the implications of the COVID-19 response on fu Has the Context for Rotary Fundraising changed?
* What are the considerations in initiating fundraisers in this Selling Alkohol makes money what are the associated impli given the large amount of non profit fundraiers conducted

## Notes from 2021:

### Sessions (1 & 2): Karl, Marjolein & Jim

* Handy website for fundraisers: [Betterworld.org](http://betterworld.org/)

Sample fundraisers mentioned:

* Raffles for gift certificates to wineries
* “Lobster Crawl” – cook 20 lobster every 15 minutes, have people drive in to pick up their reserved lobster. Meal cost $30, sell for $60. Sold 150 meals.
* Raffle for 2 e-bikes (one donated) - $10 a ticket

Areas of concern:

* Competing raffles.
* A minority of members sell the majority of tickets.
* BC & Washington have very different gambling regulations – be aware when “borrowing” ideas.

Question was asked – “What is the bigger purpose of fundraising”?

* Be a part of goodness through the world.
* What is the money for? – always stipulate when asking community to participate
* Different if it’s internal (within Club) vs Community
* Don’t underestimate value of “sweat equity” (volunteer labour)

COVID-era Fundraisers?

* Approached specific generous benefactors from previous years fundraisers and asked for donations (raised $60 K)
* Virtual Scotch/winetasting events
* Opportunity to take old ideas and put them online
* Online lotteries – check out [www.trellis.org](http://www.trellis.org)
* Adopt an apple tree (from a Rotarian orchardist) – learned how to prune & take care of it; took family pictures in front of it; harvested fruit from it
* 24 Days of Christmas (Cash calendar) – 600 tickets sold for $33 a ticket; sent money to daily winner
* Showed a sample of an “Indigenous Box” – comes 4 times a year filled with homemade items – candles, scarf, soaps, necklace.

When is it time to let an old fundraiser go?

* When you don’t have enough Club support
* When the return isn’t worth the effort
* Warning – one club dropped their “Gala Dinner” event after many years and another group scooped the idea, so it would be very difficult for Club to resurrect it again.

## Notes from 2020:

Specifically focused and promoted Fundraising Goals achieve the best results.

Watch out for any Legal implications like the Gambling Commission (US) or the Lottery (BC)

Check on Insurance issues some events especially where alcohol is served require additional or special insurance.

### Fund Raising Ideas Shared

* Clear the Attic Art Auction (Calgary Rotary club has had success with this)
* Dessert Dash
* Bike Ride, Virtual Bike Ride, Virtual run
* Uno tournament, Trivia night, Bingo
* Rib Fest
* During Life event Raise the Paddle for a specific purpose like Polio
* Life and Silent Auction during dinner gala
* Progressive dinner, Mystery Dinner (Who done it)
* Raffle ticket sales (for a nice BBQ or fishing Rod or…)
* The great Rubber Duck race
* Virtual Whiskey Tasting
* Virtual Dinner Gala
* The payment system “Square” allows for an online store
* Facebook as a fundraising venue (Use caution with this one)
* Save on Foods Gift Card sales with rebate to Rotary or perhaps local foodbank (BC)
* Haircut for a cause
* Virtual golf, Indoor Golf Tournament (Merit RC)
* Look at “Eventbrite.com” for ideas.
* Dream Auction (sorry I did not capture the club name)
* Golf Ball drop (Sell numbered golf balls and have a Helicopter drop them at one of the local golf course tee’s closest to the pin wins.
* Car Rally Scavenger hunt with social after
* Sponsor a fruit tree buyer gets to prune the tree (with help of course) and harvest the fruit when ripe
* Drive In Theater
* Mini Golf tournament with social event after.
* Ted Talk events with prominent Speaker or perhaps Comedian
* Horse Apple Gambling
* Casino Night
* The great Watermelon or Pumpkin race (kid’s activity) could be adult also
* Cinnabon sale associated with a holiday (Mother’s Day)
* Professionals day luncheon (secretary day)

Rotary International is working on ideas and resources and this information will be on the RI website soon check back often

Thank you all for joining us and sharing your great ideas.

# (9) Youth Services

2020 Facilitator: Richard DeRock

2021 Facilitators: (1) Richard DeRock & Guy Auger,

(2) Jordana LaPorte & Rob Tidd,

(3) Karl Ruether & Jim Pinnell

## Notes from 2021:

### Session (3): Karl & Jim

* Youth Services notes
* Learn to Swim partnering with YMCA
* Youth exchange, a lot of discussion
* Student of the Month
* Student visitation
* Book buddies, read to students in school and provide books
* Discussion of Jr RYLA and new RYLA

# (10) Adapting to Grow Rotary

2020 Facilitator: Cindy Piva

2021 Facilitators: (1) Cindy Piva & Aleasa Tasker,

(2) Peter Schultz & Aleasa Tasker,

(3) Ron Hooper & Jim Chamberlain

## Notes from 2021:

**All 3 sessions open with 3 ways to Grow Rotary as topics:**

* Add new Members
* Keep the members you have
* Start new clubs

### Session (1): Cindy & Aleasa

Participants were asked what they wanted to learn today

* How does Rotary need to change
* Keep current members
* Grow new members
* Increase number of active members
* How do we train new members on how to adapt

HOW DO WE MAINTAIN CURRENT MEMBERSHIP … INCREASE INVOLVEMENT

* Wendy – Follows up with less active members – keep contact key
* Cindy – adopted one on one socials – members are given a member’s name, expected to connect in next week to do something
* Chris – Sunrise adopted a walking group – it’s working
* Charlie – we have massive club – the little social connections work ‘brews and books’ – bridge club – investment club / they have about 350 members – attendance is down to ~about half of normal – especially in older people
* Brian Hillaby – club about 50 members – total attendance numbers have remained similar – but some different people are attending based on using ZOOM
* Wendy – structured year differently – changed up format of meetings – some are solely fellowship meetings – no business at all – liked the one to one socials – get new members involved immediately
* Charlie – likes name tags to engage people – assign greeters at door to greet everyone / have an opportunity to encourage guests to become new members
* Kayla – as a new active member – looking to engage and have a deeper connection to community – networking – social media use – signed up for chamber and other networking options – young people want to also want mentorship and ways to grow their personal business – Millennials want to be respected but also be unique – really appreciate knowing the finances of the club and international – where is our money spent
* Brian – have recently recruited a new member – one member invited a new person to their weekly walks … eventually joined / rather than inviting new members to a meeting – invite them to a social
* Cindy – some clubs she knows do small projects – can invite potential new members to projects
* Kayla – thinking about making meeting time earlier in day – is that working – Chris likes the early time – especially the before meeting chat
* Bob (Penticton) – starting using break-out rooms – people like it
* Cindy (Kamloops) – play Kahoot.com online with club – it’s been fun
* Wendy – with one of their fellowship meetings – 2 truths and 1 lie game was fun / also had a pub night with prizes
* Aleasa (Kelowna) – club did a St Patty’s Day Zoom party – prices, special drink, scavenger hunt, dress up – so fun!
* What is your main take-away from this discussion?
* Chris is going to take back clarity on finances
* Wendy really like the idea of inviting professionals to activities versus just coming to a meeting
* Aleasa – liked the one to one social
* Chris – one of our members helped start up a Rotex group of past

### Session (2): Peter & Aleasa

* Adapting to change is hard! There are 3 options:
* Add new members
* Keep the members you have
* Start a new club
* Open discussion
* Moya – there are lots of old guard who don’t see a reason to change
* Peter – he had an epiphany – needed to start a satellite club of people with different members – maybe don’t like all the old ways … meal, meeting times, focussed on specific topics like environment, eliminating human slavery
* Quinn – you can grow your club by keeping current members engaged – challenge is to increase active members
* Jack – how do we engage younger people using zoom into the future
* Kate Kutzner – their Rotaract club picked an area of focus or concer – they picked women and children
* Tim Shouts – doing engagement surveys – getting feedback – doing hybrid meetings for awhile – asked people how that was going – doing a survey on dues renewal – doing these surveys – using google forms
* Sandy – need to reach out to inactive members – having some successes – a photographer – everyone in your club needs to have a reason to come
* Midge – Peachland – we have a large number of seniors – they really enjoy the personal touch – hopefully with good weather we can get out and meet / our challenge is getting new members
* Ken Orthner – really enjoy what you do outside the meetings
* Quinn – the future may include both in person and ZOOM – I’m an attorney – ZOOM makes sense
* Midge – thinks ZOOM will be excellent in future for snowbirds
* Robyn Arango – now that we are using ZOOM, attendance has increased – money being saved on meals can be used for donations
* Sue – their club don’t get great attendance from some but the diversity of speakers has been excellent
* Jack – they have excellent hybrid experience using curling club and a great IT person – speakers have been excellent through ZOOM – they identified that they are struggling with getting Rotary business done
* Tim Shouts – they do business before speakers – meetings are 1 hour long – best practices on hybrid meetings – need excellent room – good camera and 2 mics – about 1 thousand dollars
* Midge – many members worry about covid
* Ken – they use co-hosts for regular meetings / we have slipped into netflix world – we need to support hotels and restaurants – we need to show empathy
* Robyn – they have speaker first / they have a square to give tips
* Moya’s group
* How adding diversity makes meeting more interesting meetings – helps avoid burn out
* Michael – suggests we need a strong social media presence
* Robyn - she writes notes to everyone about – personal touch is so important!

Peter – agreed that fellowship is central to Rotary

Zone coordinators put together a 1 hour presentation about Marketing

Michael Caruso facilitated session

Public Image – the Musical on ZOOM website

### Session (3): Ron & Jim

* Rotary is not a barrier to change.
* Rotary has to change or slowly die!
* Change process requires input from members and finding what our communities seek from Rotary clubs.
* Once basic information (member and community wants) obtained – need an action plan to meet those needs, as well as a willingness to take responsible risks and give-up some comfortable but unnecessary things from the past.
* Need a long-term vision of required adaptations not year-to-year responses – so a multi-year approach.
* Essential to create momentum and stop talking about the need to adapt.
* Need to ensure adaptations/ change is sustained.
* Again, Rotary is not a barrier – there are lots of available resources to assist at the club level.
* Need to focus on the relevance of Rotary and the need to adapt – so as to help older or reluctant members buy-in.
* Need tools to help encourage change in our clubs.
* Must talk to our communities to help determine how to be relevant and of accepted relevance.
* Need to determine what is the general feeling/ view about ‘service’ and do younger generations share those views.
* Public Image is a key to moving forward with change.
* Start some new club models and share experiences and lessons learned.

**MORE BREAKOUT NOTES *(some covered above)***

* Do we need to look at evolutionary or revolutionary change?
* Easy to talk about change, but need action/movement.
* Are there issues/opportunities as we emerge from COVID restrictions?
* What’s the value proposition? There is a cost/time component for members. What value does membership get from Rotary? Is there a difference for established vs. new members?
* COVID is a good example of change. May not have thought we could go online, but we did it. You have to believe the change is possible.
* Try trial changes. Get buy-in so that there is a shared belief.
* Make members feel like they are a part of the process to help with adaptation. Try surveys, questionnaires, and other methods to get adoption.
* Forced change is less accepted.
* May find when you reach out to the membership is that people don’t want a change.
* Consider surveys, with care, to determine member needs.
* May have to give up something or be willing to fail to grow.
* No one dictates what the club must look like within the R.I. broader requirements.
* Do multi-year planning to make sure everyone knows the direction of the club and get buy-in.
* Lots of projects and programs. Look to community for projects to lend your growth and get new members involved. Projects and purpose can aid in adapting
* District assistance is available (i.e. in helping with multi-year planning: 1 1/2 - 2 hour program. Support and mentoring to help with the implementation plan).
* Help with motivation and implementation can help prevent the plan from dying on the vine.

## Notes from 2020 “Member experience”

Best practices and Member Experience Ideas from 4 different Member Experience sessions are listed below. Some of the questions that were asked throughout the sessions were:

* What are best practices for Club Member Experience
* How can we give all members a great rotary experience?
* What was your own best experience?
* From first visit until forever, how do we attract, engage, retain members?
  + Meetings?
  + Socials?
  + Projects?
  + Training?

### Best Practices for meetings:

* Have a greeter to welcome everyone including guests
* Greeting guests – always a good practice at every meeting – and can be done on Zoom as well.
* Making guests feel welcome, not like an “anomaly”
* Make the meeting fun (see fun ideas for meeting
* There are no Rotary “Police”
* Mixing up the agenda is great
* Allow people to sit anywhere, and encourage people to sit with different people each week
  + One person mentioned their club used to have “Clicky” groups – now more open seating and Zoom has also eliminated this
* One club assigned a greeter just like they do at a meeting but for when they enter the virtual room
* Happy bucks every meeting, but at different times of meeting – mix it up Put happies first
  + Relaxes and sets tone
  + Happies and sads – mostly happies
  + Highs and lows – of the day
* Make meeting exciting right at beginning of meeting
* People show up because they are getting value – what is the value
* Inviting exchange students to Zoom calls
* Magicians/speakers – can invite speakers from anywhere to our meetings on Zoom, so take advantage of this opportunity
* Survey members – learn something about the members and what they want from their clubs
* Taylor meeting around engaging members
* 7-10 minute speakers – short and sweet – hard to do long meetings on Zoom, and 7 to 10 minutes works great
* Length of speaker matters a lot
* Once a month include a learning session
* Same agenda every week is boring!
  + Break the mold!
* Give people an opportunity to shine – engaged people’s talents – had people sing, drum, doing different things and showing their talent
* Put the fun back in Rotary

### Program ideas:

* 2 minute stand up and dance in middle of meeting
* Mystery rotarian at every meeting
* Useless fact at every meeting
* Shorter speaking time at every meeting – guest speakers get 7 – 10 minutes max!
* Special induction and framing certificates for new members
* Allowing people to talk business
* Have a welcoming atmosphere – A new member commented they liked the welcoming atmosphere, and that’s why they joined
  + It was fun
  + Everyone shook hands (pre covid)
* Have a small celebration – recognizing someone who does something great with a special club salute
* 2 new members want to create a new member orientation program (they still felt a little lost)
* When in physical meetings, use smaller tables – 6 – always had to sit with others and this really mixes it up
  + Fines for sitting in same seats
  + Fun – words matter
  + Speaker – title – don’t use the word “speaker”, use the word “topic”
    - For example, today’s topic is

Call it a core topic – highlight the value

* Hoping Sherriff – rituals – are changing – recreating new rituals and making changes to regular meeting format – getting out of the “Rut”
* Presenting is Easier on Zoom – sharing screen
* One club is researching videos and sharing 4 minute fun/educational/interesting videos at meetings

### More ideas

* Mystery Rotarian at every meeting – the president gives 3 clues during the meeting and everyone has to guess the mystery rotarian
* Reminder – meetings don’t have to be the same

### When we make it more fun, we get people engaged

* Whose responsibility is it to make it fun?
  + Leader? – committee? Set it up and make it happen
* Let members know the Results of great projects, the Why of Fundraising, at meetings (Always asking for help with projects and fundraising without a why and without speaking of the great outcomes can be de-motivators, so motivate and inspire)
* Idea – One club has been having a Prize Draw at club meetings on Zoom – donations – names are drawn – and the prize is dropped off at people’s door
* Idea: Announce birthdays – sing happy bd
* Recite 4 way test – used to at regular meetings but doesn’t work on zoom, so changing format of meetings
* **Best practice - to have Fun – if it’s not fun, why are we doing it? So spell out what you mean by fun:**
  + Sgt of arms – end on upbeat note
  + If it’s your birthday – bring a joke
  + What are we thankful for at beginning of each meeting – sets a positive tone for meetings
  + Bent Zoom background
* Change format of meetings
* Online – treasurer keeps track of happy buck comments – at $25, invoices them
* Some clubs use E transfer

### After the meetings:

* Follow up calls- several mentions that clubs are following up with guests and asking how they enjoyed the meeting
* Another club mentioned they look for who hasn’t attended in a while and ensure they are okay, and ask if they’d like to join the next meeting

### Engaging members and guests:

* Questions – easier to show interaction – in person or virtually?
  + Engage guests by asking questions, welcoming them, give a chance to introduce
* Best practice for engagement - through activity
* One club has already had 3 guests – all applied to be members – since on-line meetings
  + Did this by recognizing guests – letting them introduce themself
  + Connecting with them personally after the meeting
* Many mentioned that now they have all experienced Zoom, will probably have Hybrid meetings – physical and Zoom – together – once able to meet in person again
* It’s sometimes easier for younger people to attend a Zoom meeting than an in person meeting because of extra time needed
* Easier for people with limited travel time
* Encourage all members to attend RLI, District Spring Training, Conferences to learn more, meet new people, and thus, stay engaged.

### New member orientation and engagement:

* **Several clubs mentioned having a Mentoring program for new members**
* Mentoring – a couple of clubs mentioned they have a formal mentoring process with a booklet
* Engage in service – record setting year even with covid because they engage new members into short, hand-on projects early
* Most normal thing during Covid – one club has bring a guest, to help engage people!
* New member guide
* Red ribbon program – one club has a new member ‘on-boarding’ system and encourages new members to get into a committee – engages them from the start
* One newer member mentioned they were confused about meeting format, they were pushed onto a committee, and wanted to create a new member orientation process in her club so it doesn’t happen to other new members
* Idea - Sitting down and asking expectations from a potential new member, both of Rotary and of new member
  + Getting to know new member
  + Front end – engagement
* Red Ribbon program – again – about new member orientation – certain things to complete for a new member
* Firesides – are great for learning, great for engagement, great for socials and allowing members to meet people easier

### Best practices:

* Mentors and new member’s guide books
* Also mentoring sessions on RI Learning Center
* Best practice
* Ask what they joined for – what ideal looks like
* One on one process? Small group, goals, what are they interested in, help them find their way?
* What about long – time members
  + Engagement? All clubs struggle
  + Burn out

### About Socials:

* Socials – once/month one club has an informal “TEAM” meeting

TEAM stands for: Thursday Evening Alcohol Meeting

* Idea - Online trivia as a social
* Idea - One club had a community clean up social – doing good and a social
* Put people together for a small Zoom social such as sewing masks together, cooking together, sharing coffee, etc.
* Any project, fundraiser, could be a social
* Guess who’s coming for dinner is a fun way to meet and learn more about others in the club

Membership ideas – diff Hybrid meetings – some in person, some at venues or Rotarian’s businesses, some at projects

Sometimes the rotary experience is confusing – how to make it better?

New to club – since Social for Youth

* + Keep members engaged – How?

One club mentioned their new member experience was awkward - onboarding – how to fit – applied for a committee – haven’t heard back if they are on it or not

* Run environmental sustainability committee
* Club looking at new ideas
* Expert on LEAN systems – how do people want to be involved in a variety of levels: social, philanthropic time, money

2 years, charter – rotary NOW – new type of club test

* What member experience is?

Best practice – discovered more people coming to Zoom meetings – Why?

Because they are getting phone calls asking if they know how to get on Zoom, how are you doing – realized phone calls work

* Personal touch and calls to engage and get them on Zoom
* Coffee once/year
* Engaging members outside of club meeting is critical
* Buddy system – mentoring
* Onboarding new members
* Rotorac – experience – as an example, a Rotarac club has a section of the meeting for Personal development exercises
  + Business personal development
  + Mock interviews
  + 10 min workplace conflict session
* Atmosphere of the room is key