ROTARY CLUB
HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.

Rotary

YOUR CLUB EXPERIENCE

Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- ☐ I look forward to attending club meetings.

- ☐ Our club meeting programs are relevant, interesting, and varied.

- ☐ We have a greeter who welcomes members to meetings.

- ☐ Our meetings are organized and run professionally.

- ☐ Members sit at different tables each week to meet and talk to different people.

- ☐ Some of the members of my club are my close friends.

- ☐ Members other than club leaders participate in Rotary events at the district or international level.

- ☐ Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.

- ☐ Our members contribute to The Rotary Foundation.

- ☐ We raise funds in a way that allows members to contribute what they wish.

- ☐ We recognize members of the club or community at least monthly.

- ☐ I have made international connections through Rotary.

- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

☑ PROGNOSIS

While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	⊕ Change the meeting format or style. For ideas, see **Lead Your Club: President**, chapter 2, and **Be a Vibrant Club's** "Ideas to try." ⊕ Find out what your members want using the **Member Satisfaction Survey** and then give them that experience. ⊕ Develop leadership skills among club leaders and members by holding a **leadership skills training**.
Rotary experience beyond the club	⊕ Sponsor an **Interact** or **Rotaract** club, **organize a RYLA event**, **create a scholarship**, or **start an exchange**. ⊕ Join a **Rotary Fellowship** or **Rotarian Action Group**. ⊕ Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience. ⊕ Promote the work that Rotary does globally, including polio eradication, by showing a short **Rotary video** or projects on **Rotary Showcase** during a club meeting.

SERVICE AND SOCIALS

Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

- ☐ Our club holds regular get-togethers (aside from club meetings) for socializing and networking.

- ☐ Our club encourages members to bring partners, spouses, and family members to club meetings and events.

- ☐ Our club offers members leadership opportunities and professional development.

- ☐ Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.

- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.

- ☐ We consult community leaders and community members to determine needs before choosing a project.

- ☐ We visit Rotary Ideas, an online project idea starter, before choosing a new project.

- ☐ Our club has a service project in progress.

- ☐ All members can give input on service and social activities.

- ☐ Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.

- ☐ Our club has applied for or used Rotary grant funds for a service project.

Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	⊕ Sponsor an **Interact** or **Rotaract** club, **organize a RYLA event**, **create a scholarship**, **start an exchange**, join a **Rotarian Action Group**, or **support the Rotary Peace Centers**.
Quality of projects	⊕ Use **Community Assessment Tools**, **Guide to Global Grants**, and **Rotary Ideas** to improve the quality of your projects.
Social activities	⊕ Put one or two members in charge of organizing socials throughout the year. ⊕ Join a **Rotary Fellowship**.
Leadership	⊕ Hold a **leadership training**.

MEMBERS

A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary.

☐ Our club has had a net increase in members in the past year.

☐ Our club has had a net increase in female members in the past year.

☐ Our club has had a net increase in members under age 40.

☐ Our club seeks to recruit members from professions in the community that are underrepresented in the club.

☐ Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).

☐ Our club actively recruits Rotary alumni.

☐ Our club actively recruits recently retired professionals.

☐ Our club retains at least 90 percent of its members each year.

☐ At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.

☐ Our club has a process for soliciting feedback from members.

☐ A designated person checks and follows up on membership leads assigned to the club.

☐ Guests are asked to introduce themselves and are invited back.

☐ Member benefits are explained and promoted to new and continuing members.

☐ New members are provided with an orientation and opportunities to get involved.

☐ Newer and seasoned members are paired for mentoring relationships.

☐ We ask members to speak at meetings about their vocations or other topics of interest.

☑ PROGNOSIS

Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	➕ Take action to diversify your club using **Diversifying Your Club: A Member Diversity Assessment**.
Professional diversity	➕ Make your club a microcosm of your community with **Representing Your Community's Professions: A Classification Assessment**.
Stagnant or declining membership	➕ Create a membership development plan with **Strengthening Your Membership**. ➕ **Connect to Membership Leads** assigned to your club using **How to Manage Membership Leads (For Clubs)** and **resources for prospective members**. ➕ Target prospective members using this **exercise**. ➕ Show members how to **propose new members** to their own club and explain that they can **refer** qualified prospects to other clubs.
Members leaving	➕ Start with the **Member Satisfaction Survey** to enhance current members' experience. ➕ Learn and act on trends using the **Retention Assessment and Analysis**. ➕ Use the **Exit Survey** to understand why members resign. ➕ Let resigning members know they can **rejoin or change clubs** when they are ready.
Orientation and Rotary knowledge	➕ Offer **new member orientation**, **leadership development**, and ongoing learning opportunities with Rotary's **Learning Center**.

IMAGE

Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

☐ We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.

☐ Our club has members dedicated to public image and outreach.

☐ Our club appeared in the local media multiple times last year.

☐ We promote our club and Rotary through various media in the community.

☐ Our club invites members of the media to cover our service work.

☐ Our club materials follow Rotary's updated branding guidelines.

☐ We use branded materials and templates from Rotary's Brand Center.

☐ We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.

☐ We display Rotary signs and banners at our meeting place.

☐ Our club's presence is known in our community.

☐ We have a customized brochure that we give to community members and prospects.

☐ We use Rotary Showcase to promote our finished projects.

✓ PROGNOSIS

Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	⊕ Use the resources in Rotary's **Media Center** and use them in your community's media. ⊕ Plan events to raise community awareness of Rotary. Use the events guide in Rotary's **Brand Center**.
Outdated materials	⊕ Find customizable club brochures and membership materials on Rotary's **Brand Center**. ⊕ Follow the **Voice and Visual Identity Guidelines** in any materials your club creates. ⊕ Use **Rotary Images** and **Rotary videos**, as well as images of your members, in your materials.
Online presence	⊕ Find a tech-savvy member to create and manage your club website and social media pages. ⊕ Take the social media course in the **Learning Center**. ⊕ Use **Rotary Images** and **Rotary videos**, as well as images and videos of your own members. ⊕ Share your projects on **Rotary Showcase**.
Marketing expertise	⊕ Find tips in **Lead Your Club: Public Relations Committee** and put members with public relations expertise on the committee. ⊕ Recruit professionals with marketing expertise using ideas from **Finding New Club Members: A Prospective Member Exercise**. ⊕ Build your own social media expertise using the Social Media Toolkit in Rotary's **Brand Center**.

BUSINESS AND OPERATIONS

When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

- ☐ We have a strategic plan for our club that we update regularly.

- ☐ We have annual goals and enter them in Rotary Club Central.

- ☐ Our club has committees that support the activities and regularly report to the club board on progress toward goals.

- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.

- ☐ We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.

- ☐ Our club president attends PETS, and club leaders attend the district training assembly.

- ☐ Members attend district events and seminars on Rotary topics that interest them.

- ☐ New members are officially inducted and are presented with appropriate materials.

- ☐ At least half of our club's members have a My Rotary account.

- ☐ Club officers conduct Rotary business using My Rotary or integrated club software.

- ☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.

- ☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.

- ☐ We ask our members to complete a member satisfaction survey each year.

- ☐ We offer ongoing learning opportunities for our members.

✓ PROGNOSIS

Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of becoming ineffective and obsolete, and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	⊕ Create a vision for your club and set long-range and annual goals using the **Strategic Planning Guide**. ⊕ Track your annual goals in **Rotary Club Central**. ⊕ Use **Strengthening Your Membership** to make a membership development plan.
Innovation	⊕ Ask members for input using the **Member Satisfaction Survey**, and try their ideas. If they're successful, edit your club bylaws accordingly. ⊕ Use templates in the **Brand Center** to create your own materials.
Processes	⊕ Develop standard processes for **new members**, **prospective member follow-up**, **proposing a new member**, leadership continuity, etc.
Leadership	⊕ Find tips and resources in Lead Your Club: **President**, **Secretary**, and **Treasurer**. ⊕ Offer leadership development opportunities and promote self-paced learning with Rotary's **Learning Center**.
Managing funds	⊕ Use **The Rotary Foundation Reference Guide** to learn about giving options. ⊕ Find best practices in **Lead Your Club: Treasurer**.
Managing your club on MyRotary	⊕ Use the **Club Administration** section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.

WHAT'S NEXT?

Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas. Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

☑ FEATURED RESOURCES

Membership Assessment Tools

Membership resources

Brand Center

Learning Center

Rotary videos

SAMPLE CLUB COMMITTEE STRUCTURE

Rotary recommends five club committees. Clubs can add, eliminate, or combine committees or subcommittees according to their interests, activities, and number of members. Assistant governors or district governors can help club leaders determine suitable subcommittees.

OPTION 1: Standard Rotary Club Committees

	Club administration	Membership	Public image	Service projects	Rotary Foundation
COMMITTEES					
POSSIBLE SUBCOMMITTEES	• Club program • Member communications • Website • Social events	• Attraction • Engagement • New member orientation • Diversity	• Media relations • Advertising and marketing • Web and social media	• International • Community • Vocational • Youth service • Fundraising (for club projects)	• Polio • Fundraising (for grants) • Grants

OPTION 2: Small Rotary Club Committees

	Club administration	Membership	Public image	Service projects	Rotary Foundation
COMMITTEES					

OPTION 3: Large Rotary Club Committees

COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation
POSSIBLE SUBCOMMITTEES	• Club program • Club communications • Website • Social events	• Attraction • Engagement • New member orientation • Diversity • New clubs • Membership leads • Assessment	• Media relations • Advertising and marketing • Web and social media	• International • Community • Vocational • Youth service • Fundraising (for club projects)	• Polio • Fundraising (for grants) • Grants • Annual giving • Major giving • Stewardship

Club Runner Tips, Tricks and Traps

By Rick Moore and Laura O'Connor

Tip: Use the Committee Module in Club Runner to Help Manage Committees

The Committee Module in Club Runner is a powerful tool to help Clubs manage committees more effectively and to help committees function more efficiently.

Trick: Committees Can Use the Committee Module to Email Committee Members and to Share Work in Progress

With over 110 members, the Kalispell Rotary Club has a lot of different committees and keeping track of which member is volunteering for each project or initiative was quite a task. The Club decided to try out the Committee Module in Club Runner and has found it to be a useful tool.   The module allows the Club to assign members to their committees, giving them access to review their assignments and in addition provides email functionality that auto-populates all members assigned to a particular committee. Committee chairs can create subcommittees of the committee. The Module lets committee members post documents to their "committee page" for other committee members to access.

Trap: If Your Club is Working with other Clubs on a Project, You Can't use the Committee Module in Your Club Runner

The Committee Module only lets you assign members to a committee if they are members of your club. However, the District can set up a District Committee to let you create committees that consists of members from several clubs that are working together on a joint project. Recent examples of how this works effectively include the Peace Park Planning Committee and the Tasmanian Friendship Exchange. Contact Webmaster Arlene Weber (DG5390.2011@msn.com) if you would like to set up a committee with members from more than one club. Standing District Committees are already setup in the Committee Module on the District website.

Hybrid (Live & Virtual)
Rotary Meetings
Technical Considerations

Overview

It may be some time until all Rotarians are comfortable with attending "in-person" Rotary meetings like we have always had. In the meantime, clubs are considering "hybrid" meetings where some members meet in person and others join virtually via real-time conferencing apps such as Zoom or GoToMeeting. Several clubs have created an "E-Member" type of membership for people who cannot get away to attend the meeting and/or want to avoid the cost of a meal. Consider such hybrid membership strategies to go along with your hybrid meeting strategy.

This guide will provide some suggestions, ideas and best practices to help get your club online without a lot of invention or experimentation.

What are the challenges of adding a "virtual conference" audience to a live meeting?

First, consider your competition -- broadcast TV. People are used to clear video images, good sound, good graphics, etc. You want to do everything you can to approach that standard while at the same time getting in the game - do not let one or two technical hurdles keep you from getting started.

Examples:

- Video - A remote Webcam, DSLR or movie camera with some zoom capability makes a big difference. Zoom out to give a sense of the crowd and zoom in on the presenter. Also provides flexibility in camera location. A tripod to get the camera near the height of the presenter is highly preferable.
- Sound -- Don't count on an onboard microphone. The presenter will sound as if he/she's in a well. A small remote microphone, either wireless or wired, on the podium or a lavalier on the presenter will work much better and not pick up crowd noise, rattling dishes, etc. If there is a PA microphone on the podium just set your remote microphone to the side of it or tape it to the podium mic. Better yet, connect directly into the house sound system if possible.
- Graphics/presentations - Don't shoot a projection screen with your camera. Instead, run the slides and projector from a machine that is participating in the virtual meeting and share the screen (full screen mode). You may have to use "Duplicate" mode in PowerPoint to do this - otherwise the remote audience may see your "Presenter View" (check out in advance). Better yet, split the duties up between two operators on two machines. Your virtual audience will see both the slides in a big window and the presenter's image in a small thumbnail alongside.

Best Practices

Today's market offers countless product alternatives in each category. If you have some experience in these areas, go with your favorite tools or products. If not, here are some suggestions:

1. **Laptops** -- A laptop is a basic component of most configurations, although not essential. Simpler configurations exist (see "Best Configurations/Products " below).

    Better yet, use a separate laptop for hosting the meeting for the remote audience. This requires a second "operator", focused only on the virtual audience's experience. If the live presenter has a video, slides or graphics, run those on a separate A/V machine operated by someone else and connected to the projector.
    To provide an "in-room" experience for those at the live meeting when slides or videos are not running, this "local A/V presentation" machine can switch to the virtual feed (Zoom, etc.) to show the audience in "Gallery View" and project the virtual audience on the screen.

2. **Meeting Hosting Setup** -- Set up the meeting in advance so participants join **muted** and the meeting records automatically. If you want to allow some "chat" among members before the meeting starts, be sure you know how to mute everyone when the President opens the meeting except the machine you're running the virtual meeting on (connected to a remote microphone or mixer/house sound).

3. **Slides/videos/graphics** -- Make certain the machine running videos is set up to share sound (like music or a video) to the virtual audience (practice in advance) and its headphone output to the PA system, powered speaker or mixer. Require presenters to provide their files in advance to avoid surprises.
   a. For Slides, keep the presenter **unmuted** so the virtual audience hears the presentation. **Share your Screen** and run the slides in Slide Show mode (full screen) so the virtual audience sees the slide either full screen or with the presenter in a thumbnail alongside (their choice).
   Stop Screen Sharing when the slides stop, which will switch back to the presenter on camera.
   b. For Videos, **Share your Screen**, **mute** the presenter and run the video for the virtual audience while projecting for the live audience. When the video is over, **Stop Screen Sharing** and **unmute** the presenter.

Better Idea: Hosting the meeting on the same laptop with the same operator also running the local presentations and videos is an immense load on the operator. It is unlikely you can deliver both a great local experience and a great virtual experience from a single machine. A quirk of Zoom is that once you begin screen sharing, you lose most of the meeting controls, which can be retrieved by mousing to the top of the screen. Local viewers will see those controls on the projection screen. Other platforms may handle that situation better.
If there's on-screen AV for the meeting, it works better if the virtual audience's screen share is coming off the "live" meeting computer that's being projected (including sound, if a video) and a second operator on a second machine can still manage the virtual meeting (mute people, spotlight people, run the camera, etc.).
When there's no AV running in screen share, the A/V operator can switch to the Gallery View, projected on the "live" screen while the virtual meeting host operator is broadcasting the speaker's image full screen to the virtual audience. A 2-machine setup provides far higher likelihood of a professional outcome with far less wear and tear on the operator.

Recommendations: The #1 glitch in virtual meetings is swapping screen shares between presenters. It rarely goes well, particularly without some practice. That can be completely avoided by assembling and running all presentations and videos from the same machine. Remote presenters can pull up their own presentations locally on their own computers and run them as a "prompter" and the operator of the A/V laptop can follow them.

A simple method for advance organization and simplification of the host screen sharing is to assemble a 'template' for weekly meetings, including slides of the flag (maybe an animated .gif of a waving flag), 4 Way Test, etc. Each week, simply insert the items which are needed for that particular meeting into the template. Add a blank white (or black) screen between each item for transitions. Then, after the host opens the meeting, and ideally before admitting attendees, go into screen share mode, open the PowerPoint into play mode and have it on the first slide, maybe a welcome slide, etc. When finished with that slide, simply advance to the next blank slide and stop screen share. The next time you share the screen, you're at that blank slide and simply advance to your next item. Repeat the process through the end of the meeting. It makes for a very clean presentation, while at the same time easing a lot of workload for the host.

The #2 glitch is presenters forgetting to unmute themselves. To avoid this, the Meeting Host can use chat to cue and remind remote presenters to unmute 10-15 seconds in advance of the start of their segments.

4. **Sound** -- Good sound is perhaps the top priority in a good virtual meeting. You will likely not be satisfied with the sound pickup of a laptop's onboard microphone in a room of any size. Use a remote microphone mounted on the podium (or taped to the podium microphone) and connected to the mic input on the virtual meeting laptop. Wireless mics are available, or a wired mic with an extension cable will work. If running cables across the floor, be sure they are taped or covered with a mat for safety. Max extension for a USB is about 10', but a more expensive "repeater" cable can be used if more length is needed. A phone plug type microphone can be extended up to 50 feet, and wireless mic setups are an option, as well, although dead batteries are a showstopper (always use a known fresh battery).

5. **Internet Connection** -- Hopefully, your meeting venue can provide a reliable Internet connection. Impediments to that would include other users of bandwidth during your meeting, such as another streaming meeting held simultaneously or a local user doing a huge upload or download. Make sure in advance that you know how to get on their network.
A backup plan is a good idea. If you do not have a Wi-Fi hotspot on your Smartphone, find a member who does, and make sure you know how to quickly switch to that network in case of meltdown of the facility's Internet connection. 2 laptops would need 2 hotspots to avoid bandwidth overload.
TIP: In the case of remote speakers breaking up, having them turn off their webcam reduces load on their own (upload) bandwidth. Another good reason to avoid them screen sharing.

6. **Virtual Meeting Platform** -- Some choices include:
   a. Facebook Live - Simple vehicle for broadcasting a meeting. Does not support audience members seeing each other or switching off as remote presenters.
   TIP: In the setup of a Zoom meeting, you can choose to simultaneously stream to Facebook Live. Those viewers are not part your Zoom license seat count.
   b. Zoom - A "go-to" favorite among Rotary groups for a "2-way" meeting experience (discounts are available through Rotary Global Rewards and Tech Soup).
   c. GoToMeeting - An alternative to Zoom with some slightly different features, based on preferences of the group
   d. RingCentral - Another alternative to Zoom with more flexibility (for a bit more money)

7. **Posting** - You'll want to post your recordings where members can find them, and you can link from your club's Facebook page or web page. A YouTube Channel can be set up for free, which provides a "bucket" that you can link to and only your club's videos will be there. Vimeo is another popular choice. Use video editing software to add a title slide, perhaps some transition slides and touch up the recording before posting. For Apple users, the resident iMovie editor is a good basic option.

8. **Drip Marketing** -- You'll want to include both members and potential members in a post-event EMail with a link to the posted meeting video or the Channel where you're posting all meetings.

Resources
Here are a couple of highly informative overview videos. We suggest you have a look at these to get the "big picture" of what is available and what's possible before you begin selecting products. These are more oriented toward a streaming webinar than a 2-way meeting:

https://prochurchtools.com/the-dummies-guide-to-live-streaming-for-churches-2020-edition/

CHEAPEST Live Stream Setup For Churches (That Still Looks Awesome)

Best Configurations/Products

We are providing recommendations at several levels of cost and complexity, depending on your budget, available volunteer time and expertise. Pick a place to start, see if you are satisfied with the result and move up the technology ladder from there. Examples are based on Zoom - other platforms may work slightly differently.

Level 0 -- Super Simple

At its simplest, smaller clubs have found success with only a Smart Phone or Tablet, hand held, running a streaming application such as Facebook Live. This can be improved greatly with a small investment in two accessories:
- Tripod with a clamp mount for the phone or tablet - should be tall enough to get the camera height roughly at the presenter's eye level
- Remote Microphone & extension cable

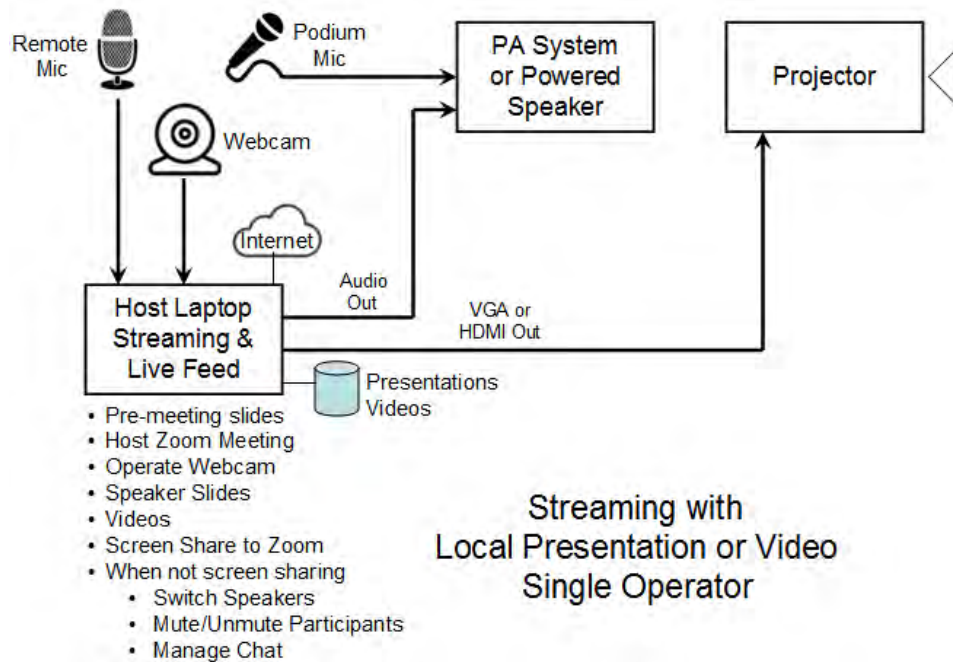**Level 1 -- Simple - no local presentations or video**

A laptop plus a tripod-mounted Webcam and remote microphone. Extension cables may be needed for both. A remote microphone with a hardware "mute" switch is a handy upgrade - good brands include Blue (Yeti), Shure, Audio-Technica. Google: "PC Microphone". A good wired lapel mic is available from Wal-Mart for about $12.

This scheme can be further upgraded by choosing a Webcam with some zoom capability. Good brands include Logitech, Avaya, D-Link, Creative. Google: "best webcam"
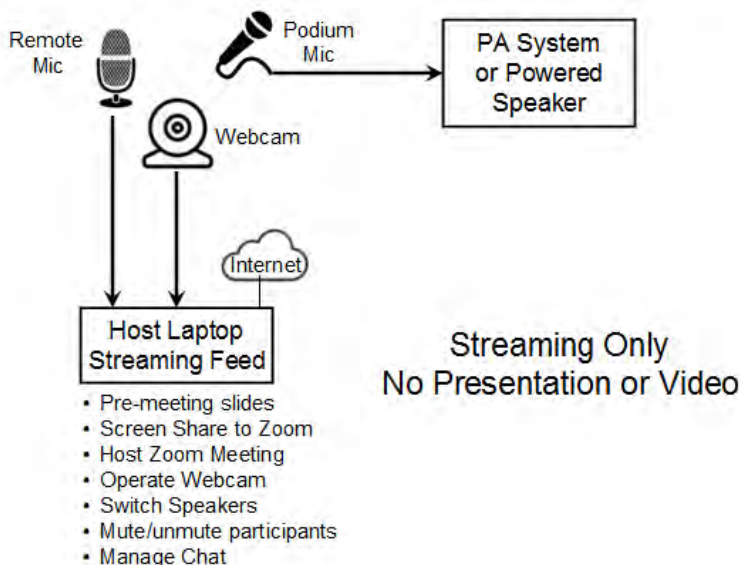
Level 2 -- Basic - with local presentation or video

     Simple configuration, plus local projection. Same laptop feeds media to the projector and can switch to "gallery view" so the live audience can see the virtual audience. Remote presenters can be seen on the projector and heard through the meeting PA system.

Note: While simple in appearance, the load on the operator of managing the camera, meeting feed to the virtual audience, sound and local visuals (presentations/videos) is overwhelming. See Level 3 for a better alternative, if a second laptop and operator are available.

Level 3 -- Intermediate - With local presentation or video - 2 operators

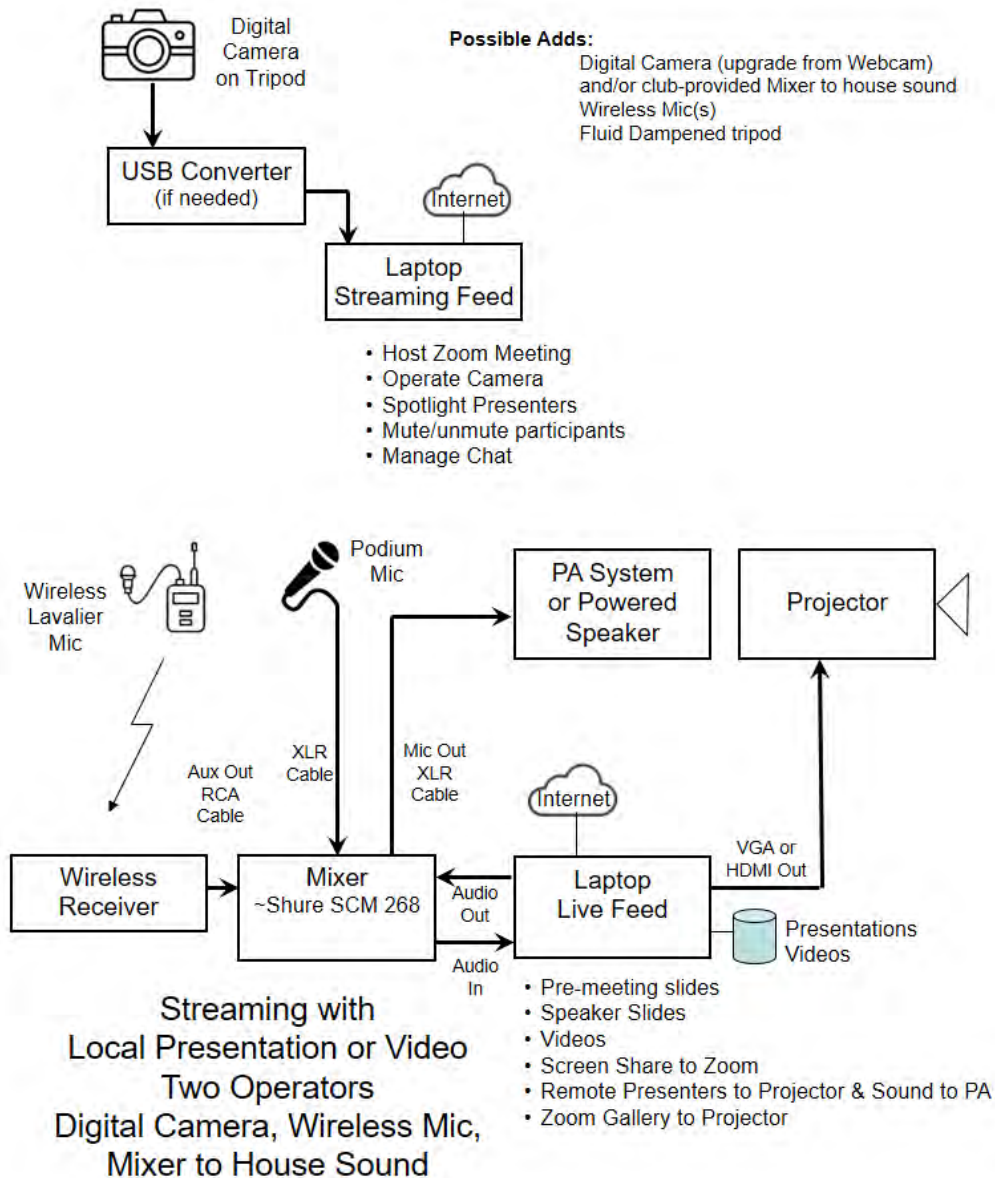
Streaming with
Local Presentation or Video
Two Operators
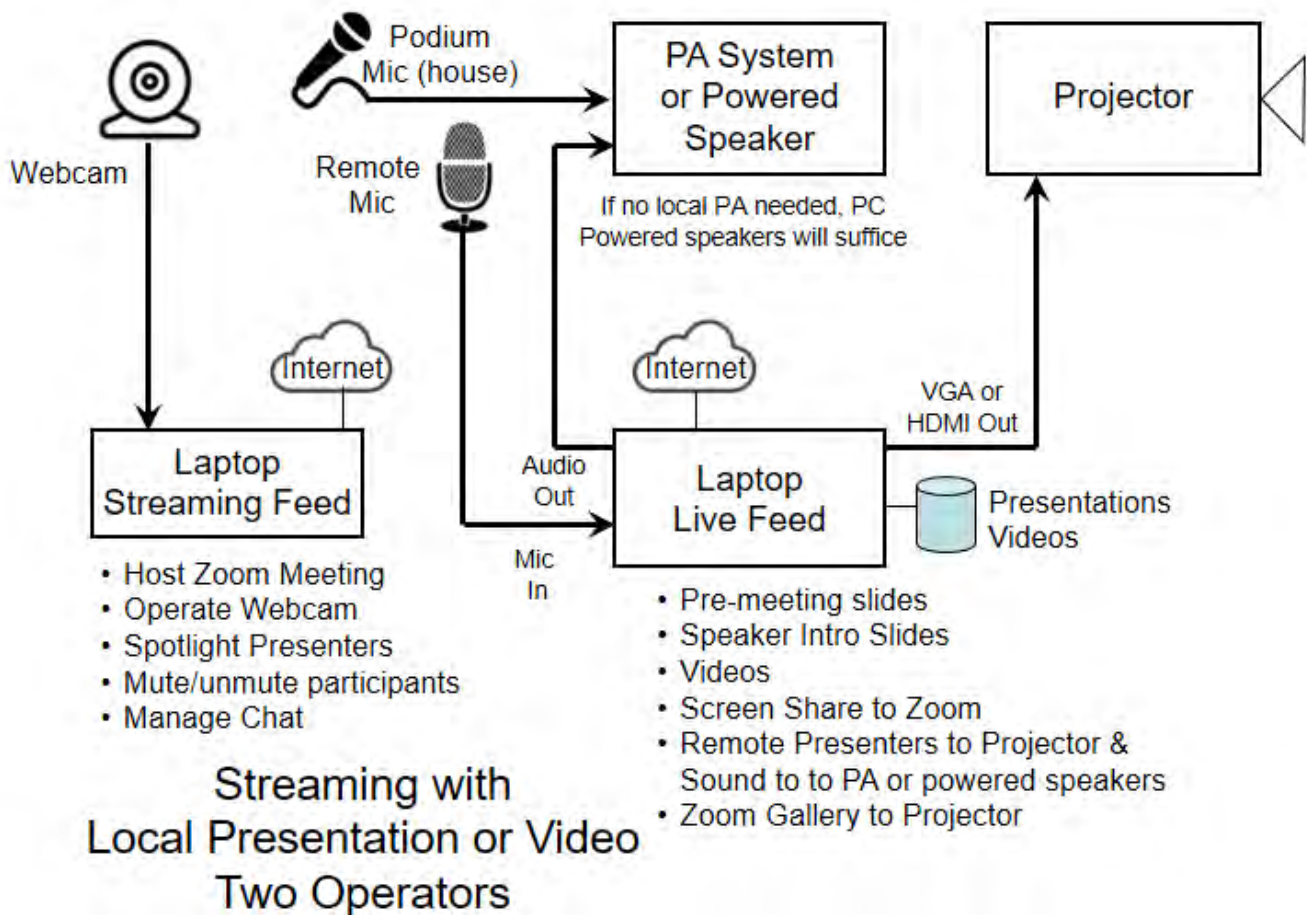
This option has huge advantages over the "single operator" strategy when visuals come into play. There is simply too much to do - too many balls to juggle, for one person to make everything work, especially if anything at all goes wrong. **IMPORTANT:** Run all audio (in and out) through the SAME laptop. Zoom automatically mutes output when it "hears" input, eliminating feedback problems.

1. **The meeting host operator** can chat with remote presenters with directions and cues, keep the webcam on the presenter or others being introduced in the live audience, spotlight virtual participants being introduced or recognized, mute people after they've spoken, and generally keep the meeting running without problems. That is all incredibly hard to do if you add to it managing and screen sharing of visual media. In this configuration, while the A/V operator is screen sharing a presentation or video with **both** the local and virtual audiences, the meeting host operator still has 100% visibility and control of all meeting management & camera functions.

2. **The AV laptop operator** can focus on getting media cued up, covering in case of a slide clicker problem, manage audio levels for the live audience, share the screen with the virtual audience for presentations or videos and fill the live meeting screen with a "gallery" of virtual participants when there's no media on screen. That gallery view can also be shared with the virtual audience or unshared, so the live presenter's image goes full screen (from the host machine's webcam).

Possible upgrades: Dampened Tripod for smoother pans/tilts of camera
                             Digital or video camera vs. webcam

Level 4 -- Advanced - - With local presentation or video - 2 operators

This is a more integrated approach to sound: **Highly recommended** – **excellent** audio for both live and remote audiences. If you get the sound right, a lot of other things are forgiven.

Streaming with
Local Presentation or Video
Two Operators
Digital Camera, Wireless Mic,
Mixer to House Sound

- More than one microphone/wireless lavalier for a "moving" presenter
- Mixer provides control of all levels - mics & sound from video. Available used for $60
- Mixer provides composite audio signal for remote streaming audience (streaming operator mutes that signal when videos are playing to remote audience from live feed laptop)
- Mixer provides path to house sound from remote audience, in case of Q/A or remote presenter

Most digital cameras have analog, HDMI or USB video outputs. Inexpensive ($15) converters are available to convert to USB, which looks like a webcam to the laptop. A digital camera has better optics, onboard zoom capabilities and provides a much higher quality image than a webcam. Available used for $50. **Note:** A "**clean HDMI output**" that hides the viewfinder status and icons is required. Recommended: Canon hf r800 or DSLR.

Another level: Add a Video Mixer for integrating multiple cameras, multiple audio feeds, etc.

Meeting Production Best Practices

- Secure all slides/videos the day before the meeting and run them in slide show mode for quality assurance. Touch up if needed (typos, font sizes, etc.)
- Set up meeting to open with all participants muted (cannot unmute) and in waiting room with recording on (prevents forgetting to start recording)
- Open meeting 1 hour before live meeting opens
- Rename host laptop as "Host"
- Rename A/V laptop as "Presentation"
- Get all presenters connected, set as Co-Hosts with ability to unmute themselves
- Check out all presenters' sound and video - lighting, etc.
- Check out room sound from A/V laptop and podium/wireless mics
- Check out projector with screen share from A/V laptop - dry run slides and videos
- Consider a backup phone conference setup between host and AV operators (if separated) and remote presenters -- FreeConferenceCall.com. If something goes wrong, you have a live phone connection to all players
- When everyone and everything is ready, turn off waiting room and admit all waiting

Host Operator Duties

- Set up & check out meeting per above
- Unmute for local speaker - remote mic or mixer
- **IMPORTANT:** Mute the host machine when sound is running from the A/V laptop over the PA system - otherwise, the virtual audience will hear sound from both the A/V laptop and the microphone picking up sound from speakers, with an annoying time delay and perhaps some feedback.
- Use "Spotlight" to immediately switch the thumbnail image to remote speakers. The "Participants" window has a typeahead search to make it easy to find them.
- Use chat or phone to communicate with and cue remote presenters, making sure they are unmuted before they begin speaking.
- When the meeting is over, you can "undo" the mute and allow the virtual audience to talk among themselves.

A/V Operator Duties

- Secure and dry run all slides and videos in advance. This eliminates the scramble when the speaker arrives late, tosses you a USB drive that may or may not contain his slides or video
- Run a "handout" print of all slides, so you know what is coming up and can easily follow remote presenters or assist a live presenter if there is a slide clicker problem. Good place for cues and notes
- Set up A/V laptop so sound from music or videos goes to virtual audience
- Check audio levels with both PA system and virtual audience
- Mute the laptop mic and stay muted
- Use Full Screen Mode
- Share your screen when videos or slides are running for both virtual audience and projector
- Unshare and show either speaker view or gallery view of remote audience on projection screen. Switch on occasion for some variety
- **Best Practice** -- Avoid swapping screen shares with remote presenters if at all possible. If remote presenters are using slides, they can run them locally (only they see them) and do their voice-over presentation. Their webcam view will be in the thumbnail alongside their slides (use spotlight to ensure that). The virtual and live audience will see the slides from the A/V laptop screen share as the A/V operator "follows" the remote presenter. During longer slide durations, unshare the screen and the remote presenter will go full screen in speaker view.

Hybrid Meeting Photo Examples

- Webcam on Dampened Tripod (note height)
- Laptop
- Projector

- Gallery View of Virtual Audience on screen

HOW TO DELEGATE YOUR ONLINE ACCESS

CONTENTS

WHAT IS DELEGATION?

As a club, district, or regional officer you can delegate temporary permission to conduct online Rotary business on your behalf to an individual in the same organizational level who has an active My Rotary account. You control the start and end date, and can schedule delegates in advance. However, you will only be able to share your access with one person at a time. Your role cannot be further delegated.

Delegation is designed only to share your online access, and it is not intended to relieve you of your duties as an officer. Your delegate will not have access anything of a personal nature such as your profile, personal contribution history, or Rotary Community Discussions. You will continue to have the same online experience for your role.
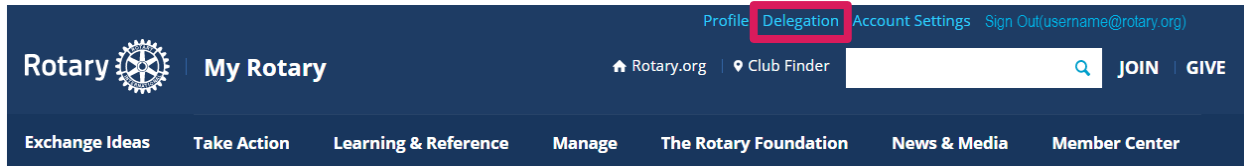
As a delegator, it is very important to begin this process only after having a thorough conversation with your delegate. Make certain that you both understand the significance and risks of this relationship because, ultimately, the responsibility of all activity lies with the delegator. You will not receive a notification stating that a change was made on your behalf.

For certain roles, a delegate will have access to sensitive information and functions. You will not be able to turn off any features. Specific areas that may be effected include,

Grants Application Tool	Rate Clubs (Rotary Club Central)
• Club Presidents • District Governors • District Rotary Foundation Chairs • District Grant Subcommittee Chairs • District Scholarship Chairs • District Stewardship Chairs • RRFCs (view only access to one member within their zone)	• Assistant Governors • District Governors

STARTING DELEGATION
To begin, log on to www.rotary.org/myrotary and hover over your name. Then, select **"Delegation"**:

The delegation screen features 4 sections: (1) Your Roles; (2) the Roles You Have Delegated; (3) the Roles that have been Delegated To You; and (4) your Delegation History:

Under each role, the organization (club name, district number, or region) and respective term dates are listed.

YOUR ROLES ⓘ

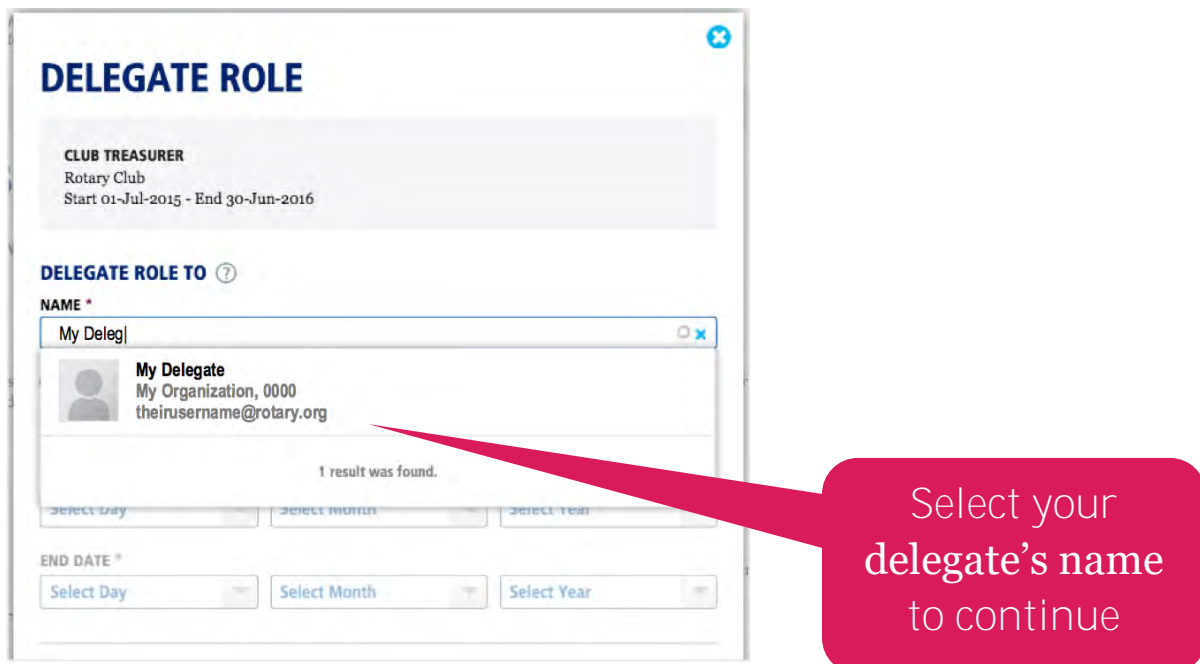**CLUB TREASURER**
Rotary Club
Start 01-Jul-2015 - End 30-Jun-2016
Delegate role

Select **"Delegate Role"** to continue

In the pop-up, start typing the name or email address of your delegate. Please Note, the search will only return the names of those who are (1) in the same organizational level as you *and* (2) if they have created a My Rotary account that is associated with their membership. Tip: enter the email address they use to log in to My Rotary.

If the search is unsuccessful, it may mean that the delegate has yet to create their account, or has created a secondary account that must be merged by Rotary Staff. If you require assistance, please email RotarySupportCenter@rotary.org.

If both criteria are met, the search will populate results:

DELEGATE ROLE

CLUB TREASURER
Rotary Club
Start 01-Jul-2015 - End 30-Jun-2016

DELEGATE ROLE TO ⓘ
NAME *
My Deleg

My Delegate
My Organization, 0000
theirusername@rotary.org

1 result was found.

END DATE *
Select Day   Select Month   Select Year

Select your **delegate's name** to continue

After making your selection, the remaining fields will activate: (1) Duration of Delegation, and (2) Terms of Delegation. Both areas must be completed to continue.

Select the start and end date for their online access. Again, you control the duration of delegation; a delegate may have as little as 24 hours of access and as long as an entire Rotary Year.

DURATION OF DELEGATION ⑦   **1**

START DATE *

18 ▼   July ▼   2015 ▼

END DATE *

30 ▼   June ▼   2016 ▼

☑ **TERMS OF DELEGATION** *   **2**
I understand that I am temporarily delegating some of my authority and responsibility to another individual. I understand that I will continue to be responsible for the duties delegated, and that the delegation will continue until I revoke it.

SAVE   Cancel

The Start Date cannot be in the past and the End Date cannot exceed the final date of your term.

If you are satisfied with your selections, click "Save". The assignment will now appear in the second column, "Roles You Have Delegated":

YOUR ROLES ⑦

CLUB TREASURER
Rotary Club
Start 01-Jul-2015 - End 30-Jun-2016
Delegate role

CLUB EXECUTIVE SECRETARY/DIRECTOR
Rotary Club
Start 01-Jul-2016 - End 30-Jun-2017
Delegate role

ROLES YOU HAVE DELEGATED ⑦

CLUB TREASURER
Rotary Club

Delegated to My Delegate
Start 16-Jul-2015 - End 17-Jul-2015
Edit | Remove delegation

CLUB TREASURER
Rotary Club

Delegated to My Delegate
Start 18-Jul-2015 - End 30-Jun-2016
Edit | Remove delegation

ROLES DELEGATED TO YOU ⑦

You have no roles currently delegated to you.

You will be copied on an automated email that informs the delegate of the Terms of Agreement, and the Duration of Delegation. The next time they log on to My Rotary, they will have the same role-based access that you experience.

EDITING OR REMOVING DELEGATION

As a delegator, you have the ability to either edit or remove the delegated access to My Rotary.

(1) Edit allows you to update the duration of the delegation. The delegation history will reflect the completed delegation.

(2) Remove: allows you to either put an end date to an ongoing delegation, or cancel a future delegation altogether. Please Note, your delegate may have their access for up to 24 **hours from the time you select "Remove"**. If the time period of the delegation never occurs, it will not appear in the Delegation History.

ROLES YOU HAVE DELEGATED ⑦

CLUB TREASURER

Rotary Club

Delegated to My Delegate
Start 6-Jul-2015 - End 17-Jul-2015

Edit | Remove delegation

QUESTIONS?
Contact RotarySupportCenter@rotary.org

CITATION GOALS
AND INSTRUCTIONS

To be eligible for the Rotary Citation, clubs need to begin the year as active clubs in good standing – or having paid each invoice balance in full upon receipt. To verify that your club is in good standing, check your daily club balance report under Club Administration > Club Finances. You should have an outstanding balance of $0.00. Invoices are due when they are posted, in mid-January and mid-July.

Rotary club leaders can go into Rotary Club Central and select at least 13 out of 25 goals they wish to apply toward citation achievement. This flexibility allows clubs to choose the goals that are most relevant and achievable. In addition, many goals will be self-rep**orted by marking "achieved"** in Rotary Club Central.

To achieve the citation:

- Go to Rotary Club Central
- Review the 25 available goals
- Select at least 13 goals (or more than 50% of the available goals)
- Achieve those goals
- Report achievement in Rotary Club Central

Once you are in Rotary Club Central, navigate to the Goal Center, select the year, and click on the All tab to see the goals.

Goal	Goal Detail
Club membership	How many total members does your club want by the end of the Rotary year?
Service participation	How many members will participate in club service activities during the Rotary year?
New member sponsorship	How many members will sponsor a new club member during the Rotary year?
Rotary Action Group participation	How many club members will be members of at least one Rotarian Action Group (RAG) during the Rotary year?
Leadership development participation	How many members will participate in leadership development programs or activities during the Rotary year?
District conference attendance	How many members will attend your district conference?
Rotary Fellowship participation	How many club members will be members of a Rotary Fellowship during the Rotary year?
District training participation	How many of your club's committee chairs will attend the district training assembly?
Annual Fund contributions	How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year?

Goal	Goal Detail
PolioPlus Fund contributions	How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year?
Major gifts	How many single outright donations of US$10,000 or more will be made by individuals associated with your club during the Rotary year?
Bequest Society members	How many individuals or couples will inform The Rotary Foundation of their plans to leave US$10,000 or more to The Rotary Foundation through their estate?
Benefactors	How many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US$1,000 or more to the Endowment Fund?
Service projects	How many service projects will your club complete during the Rotary year?
Rotaract clubs	How many new and existing Rotaract clubs will your club sponsor during the Rotary year?
Interact clubs	How many new and existing Interact clubs will your club sponsor during the Rotary year?
Inbound Youth Exchange students	How many Rotary Youth Exchange students will your club host during the Rotary year?
Outbound Youth Exchange students	How many Rotary Youth Exchange students will your club sponsor during the Rotary year?
RYLA participation	How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year?
Strategic plan	Does your club have an up-to-date strategic plan?
Online presence	Does your club's online presence accurately reflect its current activities?
Social activities	How many social activities will your club hold outside of regular meetings during the Rotary year?
Update website and social media	During the Rotary year, how many times per month will your club's website or social media accounts be updated?
Media stories about club projects	How many media stories will cover your club's projects during the Rotary year?
Use of official Rotary promotional materials	Did your club use Rotary International's advertising and public service materials, such as broadcast videos, print ads, and other official materials available in the Brand Center, to promote Rotary in your community during the Rotary year?