



Rotary
Zones 25B and 29



2019 Rotary Zones 25B and 29 Institute
September 24-29, 2019
Sheraton Overland Park at the Convention Center
6100 College Boulevard
Overland Park, KS

District Governors-Elect (GETS) Training
September 25-27, 2019

Rotary Zones 25B & 29
District Governors-Elect
(GETS)

Rotary
Institute 2019



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DISTRICT GOVERNORS-ELECT (GETS) TRAINING

Facilitators: **PDG Rich Rowland, Zone 29, District 5650**

PDG Lisa Faith Massey, Zone 25B, District 5890

Tuesday, September 24, 2019

1:00 PM – 8:00 PM	Registration	Lobby Pillar
6:00 PM – 7:00 PM	DGE & DGN With Spouse/Partner Reception Cocktails (cash bar)	Lower Escalator Lobby
7:00 PM – 8:30 PM	DGE Fellowship Dinner	Hawthorne 2
8:30 PM – 10:30 PM	DGE Hospitality Suite	Hospitality Suite 12 th Floor

Wednesday, September 25, 2019

8:00 AM – 8:00 PM	Registration	Lobby Pillar
8:30 AM – 9:00 AM	Opening Session DGE & DGN With Spouse/Partner Greeting: RI Director Larry Dimmitt	Cottonwood 1
9:00 AM – 9:30 AM	Break & Transition to Training Room	Leatherwood Pre-Function Area
9:30 AM – 9:45 AM	Session 1: Introductions and Ice Breakers PDG Rich Rowland and PDG Lisa Faith Massey	Leatherwood 1
9:45 AM – 10:45 AM	Session 2: Leading Your Team PDG Rich Rowland	Leatherwood 1

Wednesday, September 25, 2019

10:45 AM – 11:45 AM	Session 3: Supporting The Rotary Foundation	Leatherwood 1
11:45 AM – 12:00 PM	Transition to Lunch	
12:00 PM – 1:30 PM	DGE & DGN With Spouse/Partner Lunch Speaker: RI Director Stephanie Urchick	Cottonwood 1
1:30 PM – 2:30 PM	Session 4: Promoting Rotary's Public Image The People of Action Campaign RPIC Kathy Fahy RPIC Eric Liu RPIC Linda Peterson	Leatherwood 1
2:30 PM – 3:00 PM	Break	Leatherwood Pre-Function Area
3:00 PM – 4:15 PM	Session 5: Strengthening Your Membership/Grow Rotary RC Dian Edwards RC Debbie High RC Shannon Scheffel RMO Emily Tucker	Leatherwood 3
4:15 PM – 4:30 PM	Meet Your RI Director Elect Suzi Howe	Leatherwood 1
4:30 PM – 4:50 PM	Meet Your RI President Elect Holger Knaack	Leatherwood 1
4:50 PM – 5:00 PM	Wrap Up PDG Rich Rowland PDG Lisa Faith Massey	Leatherwood 1
5:30 PM – 6:30 PM	All Rotarian Reception (cash bar)	Cottonwood Pre-Function Area
6:30 PM – 8:30 PM	DGE & DGN With Spouse/Partner Friendship Dinner Speaker: TRF Trustee Jennifer Jones	Cottonwood 1
8:30 PM – 10:00 PM	DGE Hospitality	Hospitality Suite 12 th

Thursday, September 26, 2019

8:00 AM – 8:30 AM	Opening Session: “The Future is Ours” Speaker: RI Director Larry Dimmitt	Cottonwood 2 & 3
8:30 AM – 9:00 AM	Training to Training Room	
9:00 AM – 10:15 AM	Session 6: Connecting With Your Clubs PDG Lisa Faith Massey	Leatherwood 1
10:15 AM – 10:30 AM	Break	Leatherwood Pre-Function Area
10:30 AM – 11:45 AM	Session 7: Strategic Planning PDG Rich Rowland	Leatherwood 1
11:45 AM – 1:30 PM	Luncheon Speaker: PRIVP Greg Podd	Cottonwood 2 & 3
1:30 PM – 2:00 PM	Session 8: Your Support from Rotary John Hannes RI Club and District Support	Leatherwood 1
2:00 PM – 3:15 PM	Session 9: Planning Your Events PDG Lisa Faith Massey	Leatherwood 1
3:15 PM – 3:30 PM	Break	Leatherwood Pre-Function Area
3:30 PM – 4:50 PM	Session 10: Public Speaking PDG Rich Rowland	Leatherwood 1
4:50 PM – 5:00 PM	Wrap Up	Leatherwood 1
5:30 PM – 6:30 PM	Major Donor Reception	Leatherwood 3
5:30 PM – 6:30 PM	Paul Harris Society Reception (cash bar)	Leatherwood 2
5:30 PM – 6:30 PM	All Rotarian Reception (cash bar)	Cottonwood Pre-Function Area
6:30 PM – 9:30 PM	Governor Class Reunion Dinner All Institute Participant Dinner	Cottonwood Ballroom

Friday, September 27, 2019

8:00 AM – 9:15 AM	Session 11: Preparing for the International Assembly PDG Gary Bren PDG Judy Hutcherson PDG Lisa Faith Massey PDG Rich Rowland	Leatherwood 1
9:15 AM – 9:45 AM	Session 12: District Finance PDG Ronney Reynolds	Leatherwood 1
9:45 AM – 10:00 AM	Wrap up/Review/Evaluations PDG Rich Rowland PDG Lisa Faith Massey	Leatherwood1
10:00 AM – 10:30 AM	Break	
10:30 AM – 11:30 AM	*District Specific Caucus	See below
11:30 AM – 12:30 PM	Transition to All Club Luncheon	

* District Caucus Rooms:

Hawthorne 2	Leatherwood 1	Leatherwood 2	Redbud
5790	5580	6220	5610
5810	5650	6250	5630
5840	5950	6270	5680
5870	5960	6420	5710
5890	5970	6440	
5910	6000	6450	
5930			

ROTARY PAIRED ZONES 25 AND 29

Rotary
Zone 29 

● 5580, 5610, 5630, 5650, 5670, 5690, 5710,
5950, 5960, 5970, 6000, 6220, 6250, 6270,
6420, 6440, 6450

Rotary
Zone 25 

B 5790, 5810, 5840,
5870, 5890, 5910,
5930

A 4060, 4100, 4110, 4130,
4140, 4170, 4185, 4195,
4240, 4250, 4271, 4281,
4370, 4380



SESSION 1 – FACILITATOR INFORMATION

Richard A. Rowland
PDG 2009-2010, District 5650
Omaha, Nebraska



Rich has been a member of Omaha Suburban for the past 22 years. He served as President of his club in 2005-2006. Rich was District Governor for 5650 in 2009-2010. He has chaired Suburban's Membership and Foundation committees. He is a charter member of the Heartland Rotary Leadership Institute Board of Directors and serves as an instructor. Rich and his wife Tracy are Major Donors and Bequest Society members.

He has served as the lead trainer for Zone 28 DGN Class. He was a trainer for the Zone 28 GETS training in 2014/2018 and lead trainer for the 2015 class. Rich and Tracy served as trainers for the Rotary International Assembly in 2015 and 2016. He served on the Zone nominating committee in 2013 and as an Assistant Rotary Coordinator for Zone 28. He has served as a Presidential Representative to District 7610 and 6000. Rich represented 5650 at the Council on Legislation in 2016. He was a member of the Zone 28 Atlanta Promotional Committee.

Rich has been awarded the Four Avenues of Service Citation.

He is retired from JCPenney where he held various executive positions for 38 years; including Store Manager, District Manager and Director of Specialty Businesses. He served as Board member and past Chairman of the Nebraska Retail Federation. An Eagle Scout, Rich has served on the Mid America Council Boy Scout Executive Board and the Board of Trustees.

He is a past member of the Omaha National Safety Council Board. Rich has served as a Trustee and is currently a Ruling Elder of Dundee Presbyterian Church.

Rich and his wife Tracy have two adult children. Jennifer lives in Omaha and manages the Williams-Sonoma store in Omaha. Andrew and his wife own a business and live in the Kansas City area with their four children.

Lisa Faith Massey
PDG 2014-2015, District 5890
Houston, Texas



Lisa Faith Massey is the owner and President of Massey Industries, a manufacturing and industrial plating company that has served a variety of industries since 1947. Lisa Faith is a third generation native Houstonian and a third generation Rotarian following in the footsteps of her grandfather and father. After graduating high school she attended and graduated from the University of Colorado at Boulder; and then continued her education at the University of Houston's Bauer School of Business earning an MBA in Finance and International Business.

After serving District 5890 as Assistant Governor for three years and as an Area Foundation Chair, Lisa Faith served as District Governor in 2014-15 leading the District to the highest net membership growth in Zone 21b as well as raising the most money for the Rotary Foundation Annual Fund. Most recently serving as an Assistant Rotary Coordinator (2016-19) Zone 21b/27, Membership Cadre Specialist Zone 21b/27, and as a discussion leader at Lone Star PETS for multiple years. Lisa Faith is currently serving as a trainer for GETS Zone 29/25b, Rotary International Convention 2022 (Houston)-Vice Chair, Rotary International Membership & Marketing Pilot Program D5890- Chair, and has been selected to serve as a Rotary International Assembly Training Leader for 2020.

Rotary is a family event, Lisa Faith has two amazing daughters, Faith (12) and Remmie (11) who love going to club events with the Rotary Club of Houston Skyline. Our family also has two beloved dogs, Weezie and Olivia. Lisa Faith coaches girls fast pitch softball and always enjoys playing a round of golf, a great glass of wine, amazing food, a good book, and watching sports, especially football.



LEADING YOUR TEAM

Session 2

Facilitator:

PDG Rich Rowland



LEARNING OBJECTIVES

By the end of this session, you will be able to:

- Lead your district leadership team effectively
- Develop strategies for handling potential conflicts in the district

What is the
purpose of a
district?



BUILDING YOUR LEADERSHIP TEAM



- Consider new audiences.
- Develop a succession plan.
- Report appointments on My Rotary.

REFLECT

What motivates you as a volunteer leader? How will you motivate your team?



Answer these questions in your workbook and then discuss.

What are some
conflicts that you've
encountered in your
own club or the
district?

MANAGING CONFLICT



- Be prepared.
- Know how to adjust your leadership style.
- Focus on your district's goals.

ACTIVITY: FROM CONFLICT TO RESOLUTION

- Divide into groups.
- Read and respond to one of the conflict scenarios OR report your own scenario.
- Summarize your group's response, including the desired resolution, to the rest of the participants.
- Write down 3-5 conflict-resolution strategies based on your discussion.

GETS WORKSHEET

FROM CONFLICT TO RESOLUTION

In your groups, discuss your assigned conflict scenario and determine how you would arrive at a resolution. Include each step involved. Note that each conflict may have more than one resolution.

Scenario 1: Underperforming committee chair

It's halfway through the year, and one of your first-year committee chairs, who was recommended by a respected past district governor, isn't meeting your expectations. He doesn't communicate with committee members and hasn't made progress on any of the committee's goals. The committee members are frustrated and are talking about stepping down.

Consider the perspective of the committee chair. What challenges could he be facing? Why might he be struggling?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 2: Clubs not working with district

Over the past few years, a few of your clubs have developed a negative attitude toward the district, and they avoid working with district leaders. You would like them to work with the assistant governor to ensure that they receive resources and support from the district and continue to be strong clubs.

What might have caused the clubs' negative perception of the district? What support might they need that they aren't receiving?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 3: The importance of the district training assembly

A few clubs in the district say that they don't see any value in sending their club officers to the district training assembly. One president-elect tells you that she isn't attending because she thinks it is a repetition of PETS, and she is not encouraging her officers to attend.

Why might the president-elect have this perception? What other factors might contribute to her decision not to attend?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 4: Uncooperative team members

You have been asked to teach your district about Rotary's new strategic plan. Some of your team members don't see the value of the new plan or how it applies to your district, but you need their support to explain it to clubs.

What might your team be concerned about? Why might they resist this idea?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 5: Disagreement between team members

Your public relations, membership, and Foundation committees are trying to work together to arrange and promote a district fundraising event that is open to the public. The chairs of the committees don't agree on the venue or the approach to publicity. One of the chairs comes to you for direction without telling the others.

What might the chair be seeking from you? How might the other chairs react to your conversation?

State the desired resolution:

List the steps you will take to reach that resolution:

Scenario 6:

Your trainer may have asked you to think of a conflict that you have encountered or anticipate encountering in your district. Tell a partner about it and summarize it here. Then address the questions below.
Your conflict:

What might the person whose goals are in conflict with yours be thinking? What might be motivating that person?

State the desired resolution:

List the steps you will take to reach that resolution:

After each group has shared its steps and resolutions with all participants, write down 3-5 conflict resolution strategies that each group had in common.

Common strategies:

1.

2.

3.

4.

5.

Keep these strategies in mind for any conflicts that arise after GETS. Review the course about understanding conflict in the [Learning Center](#) for even more tips, and continue to look for ways to develop skills that will make you a trusted and successful manager of conflict in your district.

SUPPORTING THE ROTARY FOUNDATION



Session 3

Facilitators:

RRFC Patricia Merryweather-Arges

RRFC Art Zeitler



REGIONAL ROTARY FOUNDATION COORDINATOR

How RRFCs can support you and your district:

1. Increase Service
2. Increase Club/Member Participation
3. Increase Fundraising

LEARNING OBJECTIVES

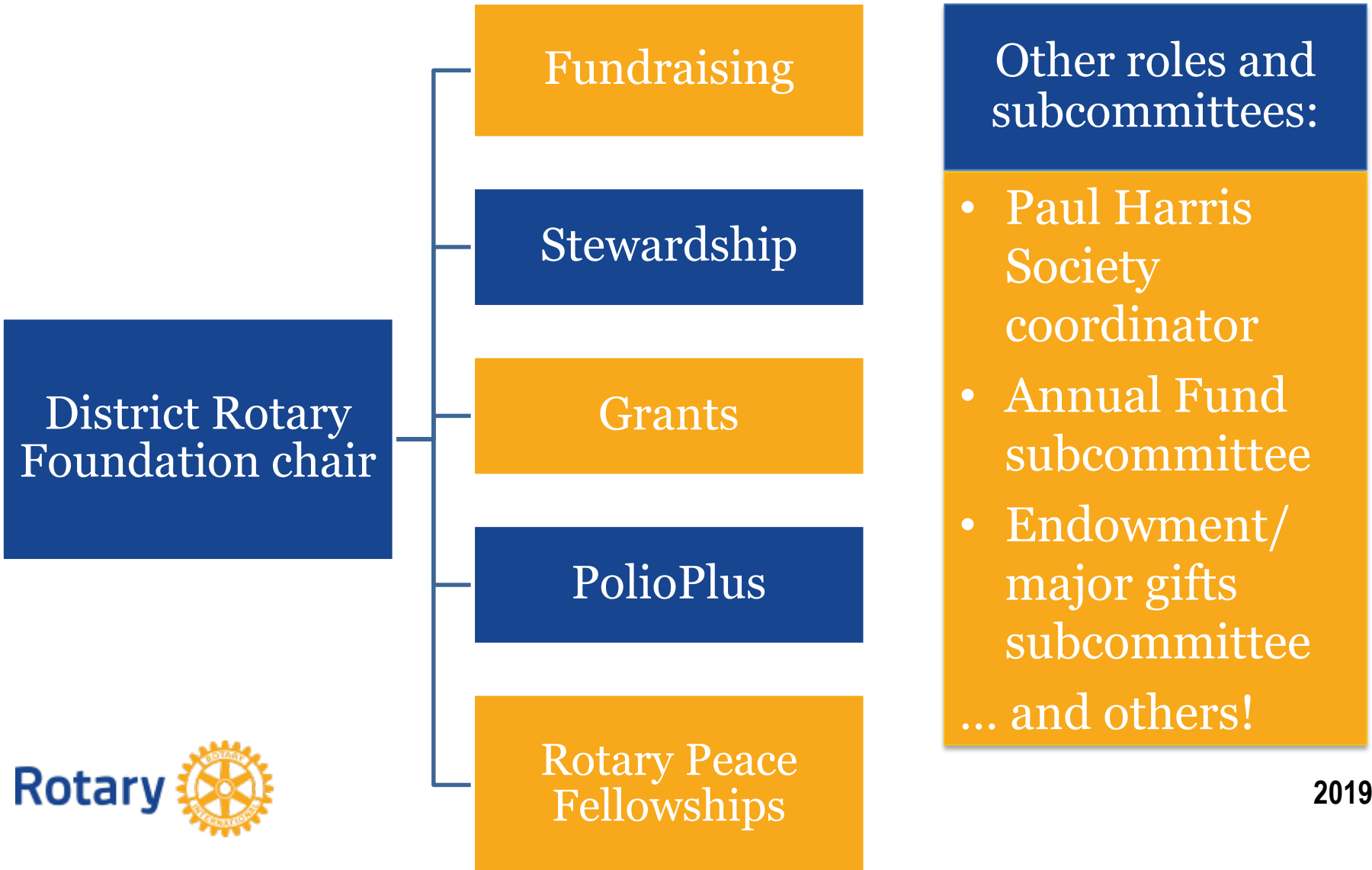
By the end of this session, you will be able to:

- Identify the qualities and skills of a successful Rotary Foundation chair and committee
- Advocate for the PolioPlus Fund, Endowment, and Annual Fund of The Rotary Foundation
- Develop a plan for DDF allocation and district grants

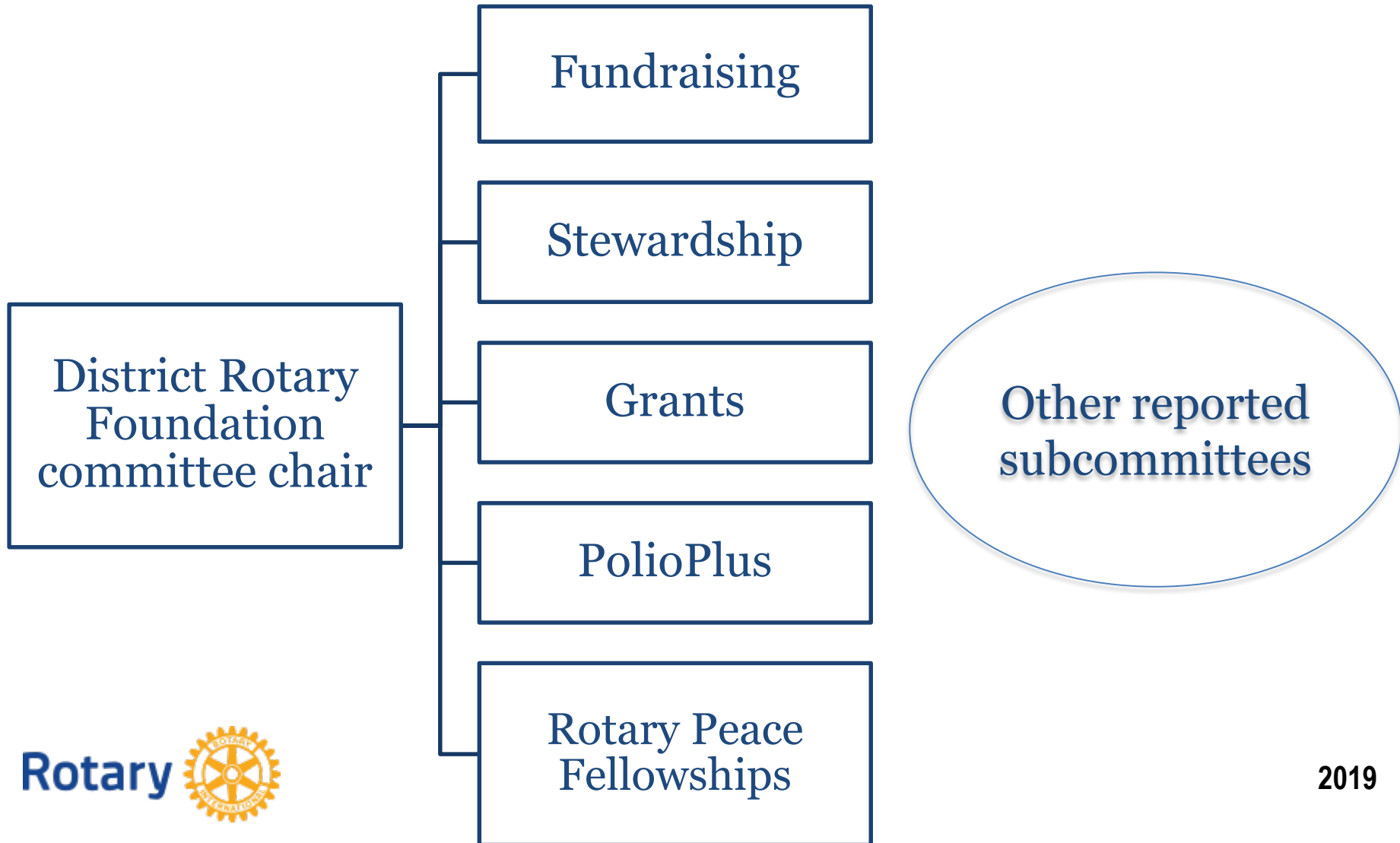


How will you
and your DRFC
work together
during your
governor year?

SUBCOMMITTEES



WHAT SKILLS ARE NEEDED TO SUCCEED IN THESE ROLES?



What stories do
you tell to
explain why
you support
The Rotary
Foundation?



FUNDS OF THE ROTARY FOUNDATION



PolioPlus Fund
End Polio Now



Annual Fund
For support today



Endowment
To secure tomorrow

HOW TO SUPPORT FUNDRAISING



Educate
members

Thank donors in
innovative ways

Get them involved
in projects

Encourage them to
support the
Foundation in
different ways

SHARE YOUR STORIES

Share your
fundraising successes
with Rotary at
annualfund@rotary.org



ACTIVITY: ENGAGING DONORS AND SPENDING FOR GOOD (PART 1)

- Work in pairs
- Answer questions in Part 1 about engaging or educating members
- Share your answers with the group

REFLECT

How will you show donors the effects of their contributions to the Foundation in your district?



Answer this question in your workbook and then discuss.



What is your
district's vision
for spending
current
contributions
three years
from now?

QUALIFICATION

District

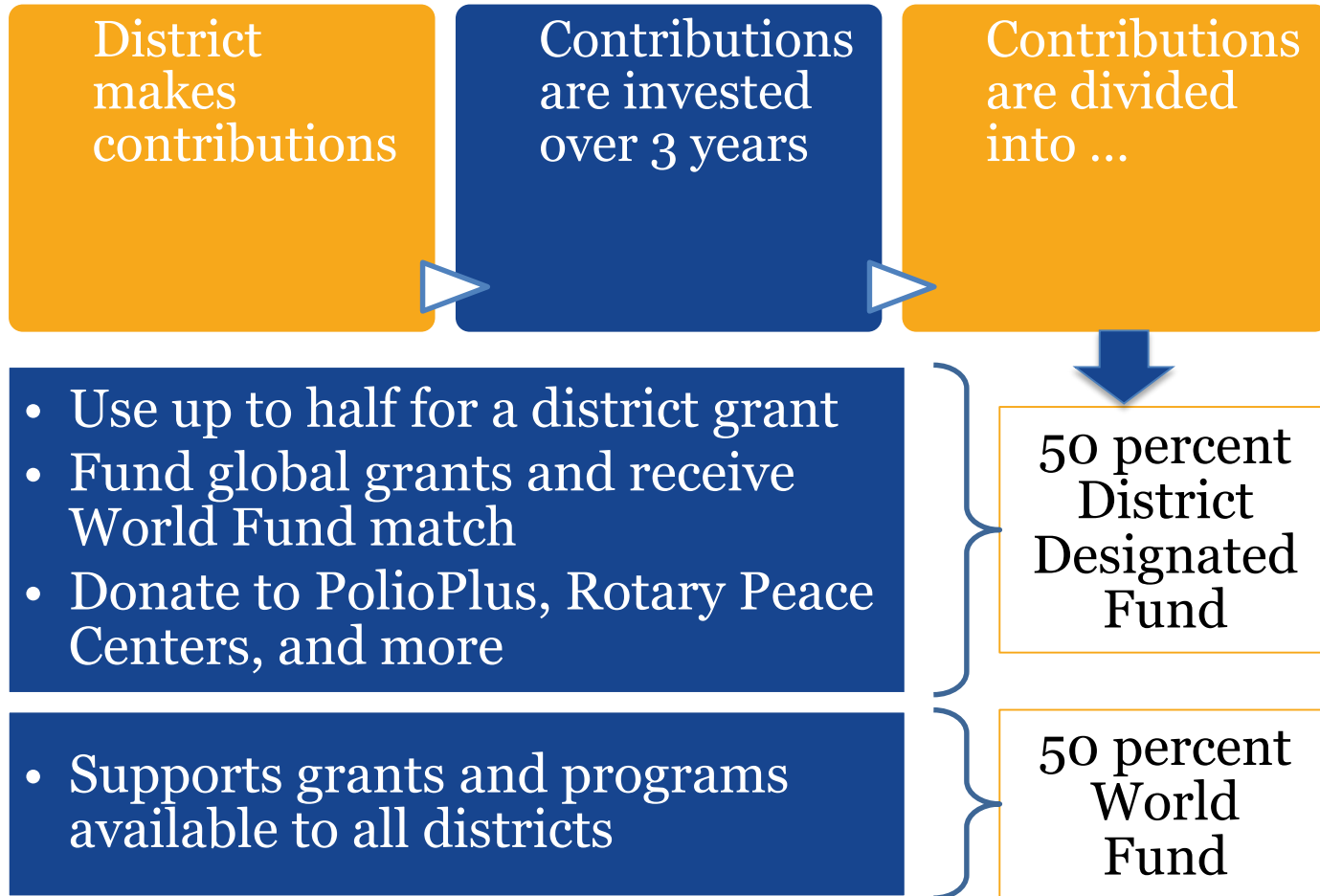
- District completes online process
- Implement district MOU

Club

- Interested club member attends grant management seminar
- Implement club MOU



ANNUAL FUND-SHARE



ACTIVITY: ENGAGING DONORS AND SPENDING FOR GOOD (PART 2)

- Work in pairs
- Answer questions in Part 2 about how your district spends DDF
- Share your answers with the group

GETS WORKSHEET

ENGAGING DONORS AND SPENDING FOR GOOD

It's important for you to build a culture of giving within your district by engaging and educating members, thanking donors, and allocating District Designated Funds (DDF) in a way that clearly demonstrates the good you do in your community.

Part 1: Engaging and Educating

Many Rotarians already give to The Rotary Foundation but may not know how their donations are being used. Newer members may not be familiar with the recognition levels or know what their gift to the Foundation can accomplish. With a partner, discuss the questions under your assigned topic:

Engaging members and donors	
How can you share progress on district fundraising goals with members and donors?	
How can you share grant updates with members and donors?	
How can you encourage members to increase their support of the Foundation?	
How do you (or others in your district) recognize and thank regular donors?	

Educating new members

What are your clubs doing to educate new members about the Foundation?

What materials would you recommend that clubs share with new members?

How can you help clubs get new members involved in the work of The Rotary Foundation?

How do you (or others in your district) recognize and thank first-time donors?

Part 2: Spending Your DDF

As governor, you can help make your District Designated Funds (DDF) policy more transparent and champion the use of these funds. With a partner, discuss these questions:

How much DDF will be available in your governor year?	
In general, what percentage of your district's DDF is spent on district grants each year? On global grants? In total?	
What are your district's funding priorities? Based on those priorities, how will you allocate your funds?	
When and how are clubs in your district notified that DDF is available and that they may submit grant proposals to the district?	
How many of your clubs apply for district grants? How can you encourage more clubs to apply?	

Club Goal Planning

Rotary Clubs need a plan and strategy to meet fundraising goals. Attached are templates and sample plans and strategies.

Sample Rotary Foundation
Club Budget Plan
(100 Rotarians)

A. Annual Giving/Share

1. 4 Paul Harris Society Members:	\$ 4,000
2. 6 New Paul Harris Fellows	\$ 6,000
3. Miscellaneous EREY and Sustaining Contributions:	\$ 5,000
4. 10% Net Proceeds from Fall Club Fundraiser	\$ <u>800</u>
	\$15,800

B. Polio

1. Pints for Polio (2):	\$ 1,200
2. Misc. Change Jar - Club Meetings:	\$ 1,000
3. 1 Paul Harris Society Member	\$ 1,000
4. Donation in Lieu of Speaker Gifts (from Operating Budget):	\$ 100
5. 10% Net Proceeds from Spring Club Fundraiser:	\$ <u>500</u>
	\$ 3,800

C. Recruiting Goals

1. 2 new Benefactors
2. 6 New Paul Harris Fellows
3. 2 New Paul Harris Society Members

D. Club Raffle Proceeds

Goal to obtain "match" funds for Grants.	
1. Global Grant *:	\$ 4,500
2. District Grant:	\$ <u>1,500</u>
	\$ 6,000
(*Plus funds from other Clubs)	

E. Local Projects and Scholarships

Funded by 90% Proceeds from Club Fall and Spring Fundraisers:	\$11,700
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Sample Rotary Foundation
Club Budget Plan
(_____ Rotarian Members)

A. Annual Giving – Share.

- | | | |
|----|--|----------|
| 1. | _____ Paul Harris Society Members: | \$ _____ |
| 2. | _____ New Paul Harris Fellows: | \$ _____ |
| 3. | Miscellaneous EREY and Sustaining Contributions: | \$ _____ |
| 4. | _____ % Net Proceeds from Fall Club Fundraiser: | \$ _____ |
| 5. | _____ | \$ _____ |
| 6. | _____ | \$ _____ |

B. Polio.

- | | | |
|----|---|----------|
| 1. | Pints for Polio (or similar) | \$ _____ |
| 2. | Misc. Change Jar - Club Meetings | \$ _____ |
| 3. | _____ Paul Harris Society Members | \$ _____ |
| 4. | Donation in Lieu of Speaker Gifts (from Operating Budget) | \$ _____ |
| 5. | _____ % Net Proceeds from Spring Club Fundraiser | \$ _____ |
| 6. | _____ | \$ _____ |
| 7. | _____ | \$ _____ |

C. Recruiting Goals.

- | | |
|----|---------------------------------------|
| 1. | _____ New Benefactors |
| 2. | _____ New Paul Harris Fellows |
| 3. | _____ New Paul Harris Society Members |
| 4. | _____ |

D. Club Raffle (or other event) Proceeds.

Goal to obtain "match" funds for R.F. Grants

- | | | |
|----|----------------------|----------|
| 1. | For Global Grant * | \$ _____ |
| 2. | For District Grant * | \$ _____ |
| | | \$ _____ |

(* Plus funds from other Clubs)

E. Local Projects and Scholarships.

Funded _____ % by Proceeds from Club Fall and Spring Fundraisers: \$ _____

SAMPLE
PLAN IMPLEMENTATION STRATEGIES TO MEET GOALS
MIDDLE OF THE HIGHWAY ROTARY CLUB 2019-20

1. Obtain two new PHS members – we have three already (two for Annual Fund and one for Polio).
2. Six new Paul Harris and two new Benefactors.
3. Be a 100% Foundation Giving Club and earn the banner:
 - a) Our Plan: \$158 average per member (banner requirement \$100)
 - b) Every member contribute at least \$25 to Annual Fund, Polio, Global Grant and/or Endowment (minimum requirement for banner).
4. In order help to make goal, provide for 10% of Fall fundraiser to Annual Fund and 10% of Spring fundraiser proceeds to Polio.
5. Various Polio fundraising activities.
6. Raffle for our Matching Funds Grant projects.
7. 90% of funds from fundraisers for local projects.
8. Financial result will be 40% increase from prior year which had no plan.
9. Membership: Current Club size 100 – Goal of increase of membership by +5; plus with new grant projects and better publicity of Club activities it might be +10.
10. Projects and Publicity: Impactful local and international projects to engage members with projects selected after input at a Club Assembly – projects' work to be publicized in local newspaper, Club website and District website, Facebook and Club meetings.

Club Banner Recognitions

100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

100% Foundation Giving Club

For clubs that achieve an average of \$100 in per capita giving and 100% participation with every dues-paying member contributing at least \$25 to any or all of the following during the Rotary year: Annual Fund, PolioPlus Fund, approved global grants, or Endowment Fund.

Every Rotarian, Every Year Club

For clubs that achieve a minimum Annual Fund contribution of \$100 per capita during the Rotary year, and every dues-paying member must personally contribute at least \$25 to the Annual Fund during the year.

Top Three Per Capita in Annual Fund Giving

For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

**District Governors-Elect
District Governors-Nominee**

Key Points For A Successful
District Rotary Foundation Program

1. Assist your DRFC in recruiting a full Rotary Foundation Committee – you need a full team!
2. Promote Paul Harris Society – you need a District PHS Chair.
- 3.a. Promote Every Rotarian Every Year – you need an Annual Giving Chair.
b. Promote earning a Club Banner (see attached criteria).
4. “Thank You” is very important.
5. Promote all Rotary Clubs to have a Club Rotary Foundation Plan to determine and achieve goals (see sample template attached).
6. Keep Polio efforts visible via events (including World Polio Day), publicity, breakout sessions at training events, etc.
7. Hold a 3:1 District Training Seminar.
8. Promote and coordinate “Club Showcases” in February (more information available from RC Debbie High).
9. Work with DRFC and District Foundation Committee to achieve as many of the thirteen Rotary Foundation priorities listed on the attached. If you achieve these goals you will have a very successful Rotary Foundation year.
10. Analyze your District Grant Program – what can you do to improve the possibility that funds will be used for “Impactful Projects”.
11. Global Grants are a key part of why we are Rotarians – they can be some of your most meaningful accomplishments – if you follow key steps they are not as difficult as you might have been told.
12. The Zone Team is available to assist, train, troubleshoot, etc., on Grants and other areas.
13. DGNs - many of the above are great topics to present during your Friday session at Lone Star PETS.



TERMS AND CONDITIONS FOR ROTARY DISASTER RESPONSE GRANTS

The Rotary Foundation (TRF) may modify the terms and conditions of the grant at any time. Updates can be found at rotary.org/grants or requested from [Rotary grants staff](#).

I. WHAT ARE ROTARY DISASTER RESPONSE GRANTS?

Rotary disaster response grants support relief and recovery efforts in areas that have been affected by disaster within the past six months. Districts are responsible for identifying the needs in those communities and determining how funding could best meet their needs. The district will have the authority to distribute the funds it receives from TRF and is required to report on the use of funds spent on relief and recovery projects.

II. ELIGIBILITY GUIDELINES

All Foundation grant activities must:

1. Relate to the mission of The Rotary Foundation
2. Include the active participation of Rotarians
3. Exclude any liability to The Rotary Foundation or Rotary International beyond the funding amount of the grant
4. Adhere to the governing laws of the United States and the host area of the grant, and harm no individuals or entities. Sponsors of projects in and travel planned to countries sanctioned by the Office of Foreign Assets Control (OFAC) of the United States Department of Treasury may need to supply additional information.
5. Be reviewed and approved by TRF before their implementation. Grants may not be used to reimburse clubs or districts for activities and expenses already completed or in progress. Planning for grant activities prior to approval is encouraged, but expenses may not be incurred. After grant approval, any changes to the original project plan must be pre-approved by TRF.
6. Demonstrate sensitivity to the host area's tradition and culture
7. Comply with the Conflict of Interest Policy for Program Participants as outlined in section 30.040. of [The Rotary Foundation Code of Policies](#).
8. Comply with the Rotary International policies for use of the name "Rotary" or other Rotary Marks, as outlined in sections 34.040.6. and 34.040.11. of the [Rotary Code of Policies](#).

9. Include signage on, or in conjunction with, projects that identifies the role of the grant sponsors and The Rotary Foundation as outlined in section 40.010.2. of The Rotary Foundation Code of Policies and in accordance with Rotary's Voice and Visual Identity Guidelines.
10. Follow Rotary's Privacy Statement for Personal Data stated in section 26.080. of the Rotary Code of Policies. Grant applications and reports should not include beneficiaries' personal data (name, age or date of birth, or other identifying information) or images of the beneficiary unless (a) it is requested by TRF and (b) written consent of the beneficiary (or their parent or legal guardian) is provided. If such personal data is inappropriately included, it may cause delays in the grant process while TRF ensures compliance with Rotary's Privacy Policy.

In addition, Rotary disaster response grants may:

1. Allocate up to 3 percent of the grant award for grant-related administrative expenses such as bank fees, postage, software, and an independent financial assessment
2. Allocate up to 20 percent of the grant award for contingencies, but all projects and activities added to the grant after it has been approved must then be approved by TRF before funds may be spent.

Each health care professional who will provide services as part of the grant activities are expected to have a minimum of US\$500,000 in professional liability insurance coverage (a.k.a. errors and omissions liability). This refers to coverage for that participant's legal liability that could arise from their professional acts or omissions that cause harm to others. The participant is responsible for obtaining and paying for this coverage.

III. RESTRICTIONS

Grants cannot be used to unfairly discriminate against any group, promote a particular political or religious viewpoint, support purely religious functions, support activities that involve abortion or that are undertaken solely for sex determination, fund the purchase of arms or ammunition, or serve as a new contribution to the Foundation or another Rotary Foundation grant.

In addition, grants cannot fund:

1. Continuous or excessive support of any one beneficiary, entity, or community
2. Establishment of a foundation, permanent trust, or long-term interest-bearing account
3. The purchase of land or buildings
4. Fundraising activities
5. Expenses related to Rotary events such as district conferences, conventions, institutes, anniversary celebrations, or entertainment activities
6. Public relations initiatives, unless they are essential to project implementation
7. Project signage in excess of \$500
8. Operating, administrative, or indirect program expenses of another organization
9. Unrestricted cash donations to a beneficiary or cooperating organization

10. Activities for which the expense has already been incurred
11. Transportation of vaccines by hand over national borders
12. Travel to National Immunization Days (NIDs)
13. Immunizations that consist solely of the polio vaccine

IV. HOW TO APPLY

Qualified districts in the affected area or country may apply for a Rotary disaster response grant. The maximum grant amount is \$25,000. Districts may apply for subsequent grants after successfully reporting on any prior disaster response grants. To apply, the district governor and district Rotary Foundation chair must complete the Rotary Disaster Response Grant Application and send it to grants@rotary.org.

The district governor and district Rotary Foundation chair are required to maintain contact with TRF grants staff, approve spending plans, oversee efforts to identify community needs and distribute funds, ensure that all government reporting and financial requirements are met, ensure that all TRF reporting requirements are met, and ensure financial stewardship of funds.

V. FUNDING AND PAYMENT

Rotary disaster response grants are funded by contributions made to the Rotary Disaster Response Fund.

1. Rotary disaster response grant payments will be made only to a district-controlled bank account dedicated to disaster response or another district-controlled grant account. Payments will not be made to individual clubs.
2. The account must require at least two signatories for any transaction.
3. Grants will be paid out at the Rotary International exchange rate at the time of payment.

Grant payments will be made when the following conditions are met:

1. TRF has received and approved a Rotary Disaster Response Grant Application authorized by the governor and district Rotary Foundation chair.
2. TRF has received a completed Rotary Disaster Response Grant Payee Form.

VI. COOPERATING ORGANIZATIONS

Cooperating organizations are reputable non-Rotary organizations or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the grant. Cooperating organizations must agree to comply with all reporting and auditing activities required by The Rotary Foundation and provide receipts and proof of purchase as required. Any funding provided to cooperating organizations must be used for specific project expenses. The sponsoring district must maintain an itemized report of such expenses.

VII. REPORTING AND AUDITING REQUIREMENTS

The district must:

1. Submit reports at least every 12 months after the initial payment is received, detailing the progress of the project(s). It must also submit a final report within two months of the project's completion. Reports must include:
 - a. A full description of the project
 - b. The Rotary clubs involved
 - c. Any cooperating organizations involved in carrying out projects
 - d. The number of people who benefited from the project
 - e. How Rotarians participated in the project
 - f. A list of expenses
 - g. A bank statement that correlates to the list of expenses
 - h. Receipts appropriately cross-referenced to the list of expenses (when expressly requested by TRF)
2. Cooperate with TRF audits.
 - a. TRF reserves the right to conduct an audit of or send a monitor to any project regardless of size, at any time.
 - b. In addition, TRF reserves the right to assess projects at any time, require the submission of additional documentation, and suspend any or all payments if in its sole discretion progress is not considered to be satisfactory.
 - c. The district will maintain detailed, accurate, and complete financial records throughout the life of the project and for five years, or more if required by local law, after the grant closure date. These financial records include original receipts, canceled checks, invoices, etc. Further, if a project is selected to receive an audit, the district must maintain all documentation until such time as TRF advises that the documents may be discarded.
3. Comply with all economic and trade sanctions, including those implemented by the Office of Foreign Assets Control (OFAC) of the United States Department of Treasury.
4. Return any unused grant funds that exceed \$500. If \$500 or less remains, the district must use these funds for disaster response activities.

VIII. SPECIAL CONSIDERATIONS FOR ROTARY FOUNDATION (INDIA)

For general information about the Foreign Contribution Regulation Act (FCRA), go to fcraonline.nic.in. In addition to all other terms and conditions, grants with full or partial payment to a Rotary district in India should follow these payment and reporting procedures to comply with GOI laws and the FCRA:

1. Grant funds will not be released to a bank account in India unless all general payment conditions listed below have been met. Either the sponsors must provide documentation showing that the

bank account is registered under the FCRA or staff must determine that sufficient funds are available from contributions made within India. Otherwise, the payment will be placed in a queue and paid on a first-come, first-served basis only when additional contributions are made and sufficient funds are available. The sponsors of grants must ensure funds are not commingled.

2. Progress reports on grant funds released to India through 31 March are due by 31 May of that same year. Final reports are due two months after the grant's completion. Grant sponsors must ensure that funds received in a FCRA-registered bank account are not commingled with local funds.
3. All progress reports must:
 - a. Meet all general reporting requirements as listed in section VII
 - b. Show that a copy of the progress report filed electronically with TRF has been submitted to the South Asia Office
 - c. Include a utilization certificate if a portion of the grant amount has been used, along with statement of receipt and payment for the grant amount, certified by an independent chartered accountant (indicating membership number of the CA)
 - d. If the grant funds were not used for any reason, include an original bank statement or bank passbook (or a photocopy certified by the bank manager or a chartered accountant) indicating the date on which the grant amount was credited and a statement explaining why the grant amount has not yet been used, even if the grant amount was received before March.
4. All final reports must:
 - a. Meet all general reporting requirements as listed in section VII
 - b. Show that a hard copy of the final report filed electronically with TRF has been submitted to the South Asia Office.
 - c. Include:
 - i. A utilization certificate along with statement of receipt and payment for grant amount, certified by an independent chartered accountant (indicating membership number of the CA)
 - ii. An original bank statement or bank passbook (or a photocopy certified as true copy by the bank manager or a chartered accountant)
 - iii. A bank reconciliation statement, if multiple grants were paid to a single FCRA account
 - iv. Originals or photocopies of bills of payment/expenses vouchers and, if only photocopies are provided, a written undertaking that "all originals will be kept for a period of eight years and will be produced as and when required by Rotary Foundation (India)"
 - v. Beneficiary information (for example, photographs, newspaper clippings, appreciation letter from beneficiary)

- d. Return of any remaining funds of any amount to the Rotary Foundation (India)
5. An FCRA-registered club or district is responsible for furnishing an FC-4 return along with the financial statements to the Ministry of Home Affairs, New Delhi, in a timely manner.

IX. SPECIAL CONSIDERATIONS FOR THE PHILIPPINES

In addition to all other terms and conditions, grants paid to a Rotary district in the Philippines require more substantiation to comply with Philippine regulations. The Philippine Securities and Exchange Commission requires foundations to include supporting documents for all projects for which they have provided funding when they file financial statements. More information about this requirement can be found in Securities Regulation Code 68, as amended. Please see Item 4 on page 19. To enable the Foundation to comply with this regulation, grant sponsors must obtain certification issued by any of the following persons/organizations in the locality for which it exercises jurisdiction:

1. Office of the Mayor, stamped with office seal
2. Head of the Department of Social Welfare and Development, stamped with office seal
3. Head of the Department of Health, stamped with office seal
4. Office of the Barangay Chairman, stamped with office seal
5. Head/officer of private institution or actual beneficiaries, notarized

Please send five (5) original certificates on each project to:

Phil. Consulting Center, Inc.

c/o Erika Mae Bautista

2D Penthouse, Salamin Bldg.

197 Salcedo St., Legaspi Village

Makati City 1229

Philippines

Sample templates of the certification may be obtained through the Rotary International South Pacific and Philippines office.

Certifications of projects paid from July to May should be received by 30 June of the same fiscal year while those paid in June should be received by 31 July.

HOW CAN I FULFILL MY INTENT TO GIVE \$1,000?

The path to fulfilling your Paul Harris Society giving intentions each year is up to you. You can donate \$1,000 at one time or in several smaller amounts that reach that total. One easy way is to donate automatically through the Rotary Direct recurring giving program. For example:

- \$85 monthly
- \$250 quarterly
- \$1,000 annually

Enroll in recurring giving at rotary.org/donate.



HOW WILL MY MEMBERSHIP BE RECOGNIZED?

Rotary districts are encouraged to recognize members of the society by presenting them a certificate and a Paul Harris Society chevron lapel pin at a district or club event, or at another special occasion. Because the society is a district-led program, leaders celebrate their local Paul Harris Society members differently around the world.

Show your commitment to making the world a better place by wearing your recognition pin.



THE ROTARY FOUNDATION OF ROTARY INTERNATIONAL

One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Rotary.org

099A-EN—(1118)

PAUL HARRIS SOCIETY



The
Rotary
Foundation 

TAKE ACTION:
rotary.org/donate

WHAT IS THE PAUL HARRIS SOCIETY?

The Paul Harris Society recognizes donors from around the world who notify The Rotary Foundation of their intention to **contribute \$1,000 or more every year** to the Annual Fund, PolioPlus Fund, or approved global grants.

HOW CAN I JOIN THE PAUL HARRIS SOCIETY?

Notify The Rotary Foundation of your intent to contribute \$1,000 or more every year by doing any of the following:

- Completing the form on the Paul Harris Society's webpage at rotary.org/paulharrissociety (look for the JOIN button to open the form)
- Emailing the Rotary Support Center at rotarysupportcenter@rotary.org or calling +1-866-9ROTARY (+1-866-976-8279). For security reasons, please do not email your completed form
- Contacting the Rotary International office that serves your area
- Mailing the attached Paul Harris Society form to The Rotary Foundation or faxing it to the Rotary Support Center at +1-847-328-4101



WHO ARE PAUL HARRIS SOCIETY MEMBERS?

Globally, more than 20,000 people are members of the society, which was established in 2013. These dedicated donors share a desire to give substantially and empower Rotary clubs to change lives in their community and around the world.

“I joined the Paul Harris Society because I believe in The Rotary Foundation. I know that by combining our giving with so many others’ we can truly make an impact and do good in the world.”

— John Salyers, past governor of District 6740

- ☐ **Yes! I would like to become a member of the Paul Harris Society. As a member, I intend to contribute \$1,000 or more every year.**

Name _____
If you are a Rotarian:
Rotary Membership ID _____
Rotary Club of _____
Club Number _____
Billing Address _____
City _____ State/Province _____
Postal Code _____ Country _____
Phone _____ Email _____

- ☐ U.S. check, payable to “The Rotary Foundation,” enclosed.
☐ Canadian cheque, payable to “The Rotary Foundation (Canada),” enclosed.
☐ Please contact me about creating a legacy with Rotary.
☐ I wish to contribute today. ☐ I will make my contribution at a later date.

Note: Fulfillment of your Paul Harris Society Membership will be based on cumulative gifts received between 1 July and 30 June each Rotary year, when financially able.

Gift designation (choose one)

☐ Annual Fund ☐ PolioPlus Fund ☐ Other: _____

Gift amount (USD)

☐ \$85 ☐ \$250 ☐ \$1,000 ☐ Other: \$ _____

Make this a recurring contribution with Rotary Direct:

☐ Monthly ☐ Quarterly ☐ Annually _____ (Please specify month)

Card Number

Expiration Date

CVN

M M Y Y

Signature _____

Contributions are tax deductible where allowed by law.

Please send your contribution to the U.S. or Canada:

The Rotary Foundation
14280 Collections Center Drive
Chicago, IL 60693 USA
The Rotary Foundation (Canada)
c/o 911600
PO Box 4090 STN A
Toronto, ON M5W 0E9 Canada

Contributions may also be made at rotary.org/donate or by calling +1-866-9ROTARY (+1-866-976-8279).



AREAS OF FOCUS POLICY STATEMENTS

The Rotary Foundation strives to process grants efficiently and ensure the quality of grant-funded projects. In each policy statement, you'll find lists of eligible and ineligible activities, including examples of the types of projects that Rotary clubs and districts have successfully implemented. All grant requests must comply with the policy statement related to their intended area of focus. Project planning is the responsibility of the host club or district.

Environmental Projects


Most areas of focus include projects designed to protect the environment. Look for the  to find projects with an environmental focus.

PEACEBUILDING AND CONFLICT PREVENTION

Rotary supports training, education, and practices related to peacebuilding and conflict prevention through initiatives that help transform¹ conflict in our communities and around the world.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to advance peacebuilding and prevent conflict by:

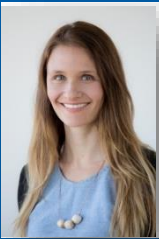





1. Enhancing the capacity of individuals and communities to transform conflict and build peace
2. Training community members in peace education, peace leadership, and conflict prevention and resolution
3. Providing services that help integrate vulnerable populations into society
4. Improving dialogue and community relations to determine how best to manage natural resources 
5. Funding graduate scholarships for career-minded professionals related to peacebuilding and conflict prevention

¹ Conflict transformation involves identifying and working with the underlying conditions, relationships, and social structures that give rise to conflict. Through this process, one moves beyond conflict resolution or management to change the environment that has led to conflict. This focus on transformation helps ensure sustainable peace.



AREAS OF FOCUS MANAGERS

Areas of focus managers provide support and guidance for Rotarian activities in the six areas of focus. Managers are available for consultation about project design, new initiatives, and grants.

	Rebecca Crall Peace and Conflict Prevention/Resolution ☎ 847-866-3374 ✉ rebecca.crall@rotary.org 📖 English, Spanish, basic French ⚙ Started at Rotary in 2006
	John Wahlund Disease Prevention and Treatment / Maternal and Child Health ☎ 847-866-3248 ✉ john.wahlund@rotary.org 📖 English and conversational Wolof ⚙ Worked at Rotary from 1990-1994, returned in 2013
	Mary Jo Jean-Francois Basic Education and Literacy ☎ 847-424-5313 ✉ maryjo.jeanfrancois@rotary.org 📖 English and Haitian Creole ⚙ Started at Rotary in 2013
	Bonaventure Fandohan Economic and Community Development ☎ 847-424-5231 ✉ bonaventure.fandohan@rotary.org 📖 English, French and Haitian Creole ⚙ Started at Rotary in 2015
	Erica Gwynn Water and Sanitation ☎ 847-866-3232 ✉ erica.gwynn@rotary.org 📖 English and Spanish ⚙ Started at Rotary in 2012
	Mohamed Keita Area of Focus and Program Communication Specialist ☎ 847-866-5284 ✉ mo.keita@rotary.org 📖 English, French and conversational Spanish ⚙ Started at Rotary in 2016

Parameters for Eligibility

TRF considers the following activities to be within the scope of the peacebuilding and conflict prevention area of focus:

1. Group activities including workshops, trainings, and other programs that support peace leadership and education, Positive Peace,² community integration of vulnerable populations, facilitated dialogue, communication, and conflict prevention and transformation
2. Education for youth on constructive ways to prevent, manage, and transform conflict, including after-school or community-based programming with robust peacebuilding and conflict-diversion activities
3. Training programs or campaigns to address conflict, or the risk of conflict, related to the use and management of natural resources 🌱
4. Legal, psychological, social, and rehabilitative services that help integrate vulnerable populations into society, including at-risk youth, refugees, trafficked people, and others affected by conflict or violence

TRF considers the following activities to be outside the scope of the peacebuilding and conflict prevention area of focus and not eligible for global grant funding:

1. Peace conferences in which Rotarians are the primary participants
2. Programs with a sole focus on music, sports, or extracurricular activities. Programs must have robust peacebuilding and conflict-diversion aspects to receive global grant funding.
3. Enrollment at a Rotary Peace Center partner university in the same, or similar, academic program as those pursued by Rotary Peace Fellows

Elements of Successful Humanitarian Projects and Vocational Training Teams

Peacebuilding and conflict prevention global grants are:

1. Sustainable — Communities can continue to make progress in peacebuilding and conflict prevention after the Rotary clubs or districts complete their work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures for peacebuilding and conflict prevention are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in

² Rotary has a strategic partnership with the Institute for Economics and Peace to help address the underlying causes of conflict and create conditions that foster peace. [Learn more](#) about our work in Positive Peace.

peacebuilding and conflict prevention. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous professional experience in peacebuilding and conflict prevention, including work or research with nongovernmental organizations, governmental agencies, or international associations
2. The academic program's alignment with peacebuilding and conflict prevention
 - a. Preferred academic programs include conflict prevention and resolution, peace and justice studies, social entrepreneurship related to peace, security studies, international relations, and other degrees with a specialization in peace and conflict, such as human rights law.
 - b. Programs that focus directly on peace and conflict issues and outcomes will be considered favorably.
 - c. Programs that will not be considered favorably include those related to general international relations with no emphasis on peacebuilding, conflict transformation, or conflict prevention and resolution, as well as other general social development degrees.
3. The applicant's career plans as they relate to peace and conflict transformation, prevention, and resolution

DISEASE PREVENTION AND TREATMENT

Rotary supports activities that reduce the causes and effects of disease. Projects strengthen the health care system³ by improving access to and expanding medical services, providing medical equipment, or training health care personnel.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to prevent and treat disease and support health by:

1. Improving the capacity of local health care professionals
2. Promoting disease prevention and treatment programs that limit the spread of communicable diseases and reduce the incidence and effect of noncommunicable diseases
3. Strengthening health care systems
4. Providing clinical treatment and rehabilitation for physical disabilities
5. Funding graduate scholarships for career-minded professionals related to disease prevention and treatment

Parameters for Eligibility

TRF considers the following activities to be within the scope of the disease prevention and treatment area of focus:

Prevention and Control of Communicable Diseases

1. Disease testing through projects such as health fairs, provided they include counseling and referrals or help admit patients for treatment
2. Educating community members and health care professionals about intervention strategies for preventing disease transmission
3. Providing equipment specifically to offer health care services to remote populations that lack access to the local primary care system
4. Supplying medical equipment to health care facilities. Equipment must meet current technology standards and satisfy environmental criteria for power, water, and air quality. Grant sponsors must provide proof of ownership and operational and maintenance plans, including documentation showing that personnel have received training on equipment operation and maintenance, or a training plan that ensures compliance with these requirements.
5. Providing surveillance systems, along with training, to track and monitor the diagnosis and treatment of disease
6. Treating communicable diseases through an approach that also helps prevent disease, improve the training of medical professionals, or enhance public health education to promote a community's long-term well-being

³ A health care system includes both the public and private sectors engaged in the delivery of health services.

7. Preventing and controlling illnesses transmitted by mosquitoes and other vectors. High-priority projects will include identifying environmental hazards specific to vector-borne diseases and remedial strategies. 🌿
8. Addressing environmental hazards related to infection and disease containment, such as disposal of medical waste in health care facilities 🌿

Prevention and Control of Noncommunicable Diseases

1. Offering prevention and treatment services for physical and mental illnesses and related disabilities
2. Developing community education and early screening and treatment programs designed to reduce the incidence and prevalence of chronic diseases
3. Providing equipment specifically to offer health care services to remote populations that lack access to the local primary care system
4. Supplying medical equipment to health care facilities. Equipment must meet current technology standards and satisfy environmental criteria for power, water, and air quality. Grant sponsors must provide proof of ownership and operational and maintenance plans, including documentation showing that personnel received training on equipment operation and maintenance, or a training plan that ensures compliance with these requirements.
5. Providing lifesaving surgeries and surgeries to address congenital problems, provided they include assessing the beneficiary and ensuring follow-up care
6. Treating noncommunicable diseases, including mental illness, through an approach that also helps prevent disease, train health service professionals, or enhance public health education with measurable outcomes to promote a community's long-term well-being
7. Preventing traffic- or vehicle-related injuries, provided these projects can demonstrate measurable reductions in such injuries
8. Supplying vehicles, personnel, and equipment to provide emergency medical services. Ambulances must be new and purchased locally and include documentation of ownership, operation, maintenance, repair, and security systems by the appropriate health care facility.

TRF considers the following activities to be outside the scope of the disease prevention and treatment area of focus and not eligible for global grant funding:

1. Projects that consist exclusively of purchasing furniture, supplies, consumables, or nonmedical equipment, such as solar panels
2. Medical missions or surgical team trips that do not provide educational outreach programs or significant capacity-building in the project country, with the exception of lifesaving surgeries and surgeries to address congenital problems
3. Eco-stove or indoor stove-top projects

4. Nonconventional or alternative therapies for treating physical and mental disabilities, unless they include clinical protocols supervised by health care professionals
5. Treatment of pervasive developmental disorders and other spectral disorders, including autism, unless there are measurable clinical interventions that demonstrate an improvement of the disorder's long-term impact
6. Nutrition programs, unless they target clinical malnutrition or interventions in the first 1,000 days between a woman's pregnancy and her child's second birthday
7. Introduction of new technology without documentation of its prior successful use in the project area and appropriate operations, maintenance, replacement, and repair systems in place
8. General health education and public safety programs

Elements of Successful Humanitarian Projects and Vocational Training Teams

Disease prevention and treatment global grants are:

1. Sustainable — Communities can address their disease prevention and treatment needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures for disease prevention and treatment are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community-driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers related to disease prevention and treatment. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of disease prevention and treatment
2. The academic program's alignment with disease prevention and treatment, such as public health and advanced degrees in nursing and medicine
3. The applicant's career plans as they relate to disease prevention and treatment

WATER, SANITATION, AND HYGIENE

Rotary supports activities that encourage the management and protection of freshwater resources and provide universal and equitable access to safe drinking water, sanitation, and hygiene. TRF seeks to empower governments, institutions, and communities to manage their water, sanitation, and hygiene services through environmentally sound, measurable, and sustainable interventions. 🌱

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure communities' sustainable access to water, sanitation, and hygiene by:

1. Facilitating universal and equitable access to safe and affordable drinking water
2. Improving water quality by protecting and maintaining surface- and groundwater resources, reducing pollution and contaminants, and promoting wastewater reuse 🌱
3. Facilitating universal and equitable access to improved sanitation and waste management services in order to achieve open defecation-free communities 🌱
4. Improving community hygiene knowledge, behaviors, and practices that help prevent the spread of disease
5. Strengthening the capacity of governments, institutions, and communities to develop, finance, manage, and maintain sustainable water and sanitation services
6. Funding graduate scholarships for career-minded professionals related to water, sanitation, and hygiene

Parameters for Eligibility

TRF considers the following activities to be within the scope of the water, sanitation, and hygiene area of focus:

1. Ensuring access to safe drinking water, including projects focused on water supply, storage, purification, treatment, and source water protection 🌱
2. Ensuring access to improved sanitation, defined as the collection, treatment, and disposal of human excreta or urine through sanitation infrastructure and fecal-sludge management, treatment, and disposal 🌱
3. Providing hygiene education that promotes healthy behaviors such as hand washing, safe disposal of human waste, safe water storage, and proper menstrual hygiene. The program must identify the factors that prevent or encourage positive behaviors and describe how to address barriers.
4. Providing solid waste management systems, defined as the process of collecting, treating and disposing of solid waste materials 🌱
5. Using watershed management practices to protect source water and recharge surface and groundwater resources 🌱
6. Supplying water for crop, livestock, and fisheries production
7. Developing sustainable management practices to support water and sanitation services, including

community governance, financing and planning, system maintenance, and delivery

8. Organizing strategic advocacy initiatives to encourage regional, national, and local authorities to implement policies that support sustainable access to water, sanitation, and hygiene. These include allocating funding for related services, establishing standards and guidelines, and developing processes for certifying communities as open defecation-free.

TRF considers the following activities to be outside the scope of the water, sanitation, and hygiene area of focus and not eligible for global grant funding:

1. Hygiene programming that focuses on increasing knowledge and providing standardized information rather than changing behavior. One-time education sessions are not eligible.
2. Single-event river or beach clean-ups that are not part of a watershed management project
3. Projects that solely construct water and sanitation systems

Elements of Successful Humanitarian Projects and Vocational Training Teams

Water, sanitation, and hygiene global grants are:

1. Sustainable — Communities and governments can better address their water, sanitation, and hygiene needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes in water, sanitation, and hygiene and water resource management. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community. Governments, communities, and businesses work together to build, own, and operate sustainable water and sanitation systems.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in water, sanitation, and hygiene. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of water, sanitation, and hygiene or water resource management
2. The academic program's alignment with water, sanitation, and hygiene or water resource management. Examples include water and sanitation engineering, environmental engineering, integrated water resource and systems management, hydrology, and public health.
3. The applicant's career plans as they relate to water and sanitation

MATERNAL AND CHILD HEALTH

Rotary supports activities and training to improve maternal health and reduce mortality for children under five. Projects strengthen the health care system⁴ by improving access to and expanding medical services, providing medical equipment, and training health care personnel.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to improve the health of mothers and their children by:

1. Reducing the neonatal and newborn mortality rate
2. Reducing the mortality and morbidity rate of children under five
3. Reducing the maternal mortality and morbidity rate
4. Improving access to essential medical services, trained community health workers, and health care providers
5. Funding graduate scholarships for career-minded professionals related to maternal and child health

Parameters for Eligibility

TRF considers the following activities to be within the scope of the maternal and child health area of focus:

1. Maternal prenatal, delivery, and antenatal care
2. Training or “train the trainer” initiatives for maternal and child community health care workers and medical professionals
3. Projects that provide medical equipment to health care facilities. Equipment must meet current technology standards and satisfy environmental criteria for power, water, and air quality. Grant sponsors must provide proof of ownership and operational and maintenance plans, including documentation showing that personnel received training on equipment operation and maintenance, or a training plan that ensures compliance. Equipment projects must include educational activities for women related to healthy pregnancy, delivery, or neonatal care.
4. Education about and enhanced access to family planning and other sexual and reproductive health interventions and services available through the health care system
5. Immunizations for women, adolescent girls, and children under five
6. Interventions to combat pneumonia, diarrhea, malaria, measles, and other major causes of disease in women and children under five
7. Interventions to reduce the transmission and impact of sexually transmitted disease in adolescents and women

⁴ A health care system includes both the public and private sectors engaged in the delivery of health care services.

8. Prevention of mother-to-child transmission of HIV
9. Projects that promote breastfeeding and other actions that prevent, reduce, and treat the effects of malnutrition
10. Lifesaving surgeries and surgeries to address congenital problems, provided they include assessing the beneficiaries and ensuring follow-up care
11. Projects that address environmental hazards related to the containment of infection and transmission of disease, such as the disposal of medical waste in health care facilities 🌿

TRF considers the following activities to be outside the scope of the maternal and child health area of focus and not eligible for global grant funding:

1. Medical missions and surgical team trips that do not provide significant capacity-building in the project country, except for lifesaving surgeries and surgeries to address congenital problems
2. Garden projects, food supplements, and school-based nutrition programs
3. Eco-stove or indoor stove-top projects
4. Playgrounds and general childhood exercise and wellness projects
5. Nonconventional or alternative therapies for treatment of physical and mental disabilities, unless they include clinical protocols supervised by health care professionals
6. Sexual and reproductive health projects for adolescents, unless they are carried out within the health care system under the supervision of licensed medical professionals
7. Furniture, supplies, and consumables, unless they are part of a larger maternal and child health project that meets the eligibility parameters for global grants
8. General health education and public safety programs

Elements of Successful Humanitarian Projects and Vocational Training Teams

Maternal and child health global grants are:

1. Sustainable — Communities can address their maternal and child health needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community-driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers related to maternal and child health. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of maternal and child health
2. The academic program's alignment with maternal and child health. Examples include epidemiology, nutrition, global health, public health, and health promotion, as well as advanced degrees in nursing and medicine.
3. The applicant's career plans as they relate to maternal and child health

BASIC EDUCATION AND LITERACY

Rotary supports activities and training to improve education for all children, and literacy for children and adults.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure that all people have sustainable access to basic education and literacy by:

1. Supporting programs that strengthen a community's ability to provide basic education and literacy to all
2. Increasing adult literacy
3. Working to reduce gender disparity in education
4. Funding graduate scholarships for career-minded professionals related to basic education and literacy

Parameters for Eligibility

TRF considers the following activities to be within the scope of the basic education and literacy area of focus:

1. Improving academic outcomes at the early childhood, primary, and secondary levels, in collaboration with local school officials
2. Educating adults in reading, writing, and numeracy skills
3. Providing professional development opportunities for teachers with a qualified trainer in curriculum implementation, effective instructional methods, or student assessments
4. Strengthening basic educational outcomes by providing improved learning materials and facilities supported by enhanced curricula and new professional development for teachers
5. Improving academic support for before- and after-school programs by training tutors and teachers, conducting student assessments, and providing equipment if needed
6. Supporting educators' ability to help students with physical or developmental disabilities achieve greater academic outcomes by providing professional development opportunities for teachers and staff, as well as basic educational materials and enhanced facilities if needed

TRF considers the following activities to be outside the scope of the basic education and literacy area of focus and not eligible for global grant funding:

1. Projects that consist exclusively of infrastructure, vehicles, or equipment purchases, and training on their use
2. Projects that provide salaries, tuition, or school supplies without the means for the community or non-Rotary entity to maintain these in the future
3. Projects that purchase only extracurricular or play materials or playgrounds

4. Projects that focus on school feeding or providing infrastructure and equipment for school feeding programs
5. Projects the community is not able to sustain after grant funding ends
6. Projects that benefit only one cohort of students, such as tutoring or after-school programs that will function only during the life of the grant

Elements of Successful Humanitarian Projects and Vocational Training Teams

Basic education and literacy global grants are:

1. Sustainable — Communities can address their basic education and literacy needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in basic education and literacy. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of basic education and literacy
2. The academic program's alignment with basic education and literacy. Examples include education, literacy, curriculum development, special education, and school administration.
3. The applicant's future career plans as they relate to basic education and literacy

COMMUNITY ECONOMIC DEVELOPMENT

Rotary supports investments in people and communities to alleviate poverty, creating measurable and enduring economic improvements in poor and underserved areas.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to alleviate poverty by:

1. Building the capacity of local leaders, organizations, and networks to support economic development in poor communities
2. Developing opportunities for productive work and improving access to sustainable livelihoods
3. Empowering marginalized communities by providing access to economic opportunities and services
4. Building the capacity of entrepreneurs, social businesses, and locally supported business innovators
5. Addressing gender or class disparities that prevent populations from obtaining productive work and accessing markets and financial services
6. Increasing access to renewable energy and energy-efficiency measures to create more sustainable and economically resilient communities 🌱
7. Empowering communities to develop environmental and natural resource conservation skills for economic gain 🌱
8. Strengthening communities' economic resilience and adaptive capacity⁵ in response to environmental and climate-related hazards and natural disasters 🌱
9. Developing and supporting community-based basic emergency preparedness services to improve economic resilience
10. Funding graduate scholarships for career-minded professionals related to community economic development

Parameters for Eligibility

TRF considers the following activities to be within the scope of the community economic development area of focus:

1. Providing poor communities with access to financial services, including microcredit, mobile banking, savings, and insurance
2. Offering training related to community economic development, including entrepreneurship, community leadership, vocational skills, and financial literacy

⁵ Adaptive capacities refer to the social and technical skills of individuals and groups that allow them to respond effectively to environmental and socioeconomic changes.

3. Developing community members' economic and employment potential through leadership training and empowerment tools, especially through initiatives for women, refugees, and young adults
4. Supporting small-business, cooperative, or social-enterprise development and income-generating activities for the poor, including organizing area-wide businesses that provide employment
5. Furthering agricultural development for subsistence and small farmers, including building capacity and facilitating access to financial markets and capital
6. Organizing community-led and -coordinated adopt-a-village initiatives, or comprehensive community development activities
7. Supporting equal and effective economic opportunities for women, refugees, and other marginalized populations
8. Providing access to renewable, clean, and efficient energy through sustainable, locally purchased, and innovative technology, as well as substantial training directly connected to economic outcomes 🌱
9. Training communities in conservation and resource management to help them preserve, protect, and sustainably use natural resources for their economic benefit and growth 🌱
10. Improving communities' ability to adapt to environmental and climatic changes through capacity-building, and developing sustainable economic activities 🌱
11. Providing training and basic resources to support basic emergency preparedness initiatives and enhance communities' economic resilience, including fire prevention and natural disaster preparedness

TRF considers the following activities to be outside the scope of the community economic development area of focus and not eligible for global grant funding:

1. Community infrastructure or equipment projects without direct economic results, or without operational and maintenance plans
2. Community beautification projects such as parks and playgrounds
3. Projects to rehabilitate community centers

Elements of Successful Humanitarian Projects and Vocational Training Teams

Community economic development global grants are:

1. Sustainable — Communities can address their economic development needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in community economic development. TRF considers the following when evaluating global grant scholarship applications:

1. The applicant's previous work experience in the field of community economic development. Applicants are expected to demonstrate how their work contributed to the economic well-being of poor, low-income, or underserved communities at the local, regional, or national level.
2. The academic program's alignment with community economic development
 - a. Examples include social science degrees with a focus on community economic development and business degrees tailored to social business, micro-entrepreneurship, or microcredit
 - b. Programs that will be favorably considered include those that:
 - i. Emphasize local, regional, or national economic development strategies
 - ii. Focus on addressing economic issues of poor, low-income, and underserved communities
 - iii. Support social business development, such as a specialized track within a master of business administration program
 - iv. Provide a business degree to teach entrepreneurial skills or support startups at the local, regional, or national level
 - v. Include "community development" in the name of the program or specialized track
 - vi. Improve the coaching or advising capability of an individual working with small businesses or entrepreneurs
 - vii. Focus on strategies to address environmental issues that affect poor, low-income, and underserved communities, such as resource management, environmental and conservation studies, resilience planning, and preparedness 🌿
 - viii. Use urban planning principles to guide economic development strategies
 - c. Programs that will not be favorably considered include those that:
 - i. Focus on purely theoretical, macro-level economics, politics, or finance
 - ii. Support general private business development, such as a master of business administration for professions unrelated to social enterprise
3. The applicant's career plans as they relate to community economic development
 - a. Careers that will be considered favorably include those that:
 - i. Improve the economic and social well-being of poor, low-income, and underserved communities at the local, regional, and national level
 - ii. Are in a nonprofit or social enterprise environment
 - iii. Support advocacy for economic and social well-being (e.g. for poor communities, youth, women, indigenous peoples, refugees, and other underserved populations)

- iv. Address environmental issues that affect poor, low-income, and underserved communities through strategies including resource management, environmental and conservation studies, resilience planning, and preparedness 🌿
- b. Careers that will not be considered favorably include general roles in business, engineering, or social work, or general administration in a private or corporate environment

Global Grant Lifecycle

Application Phase

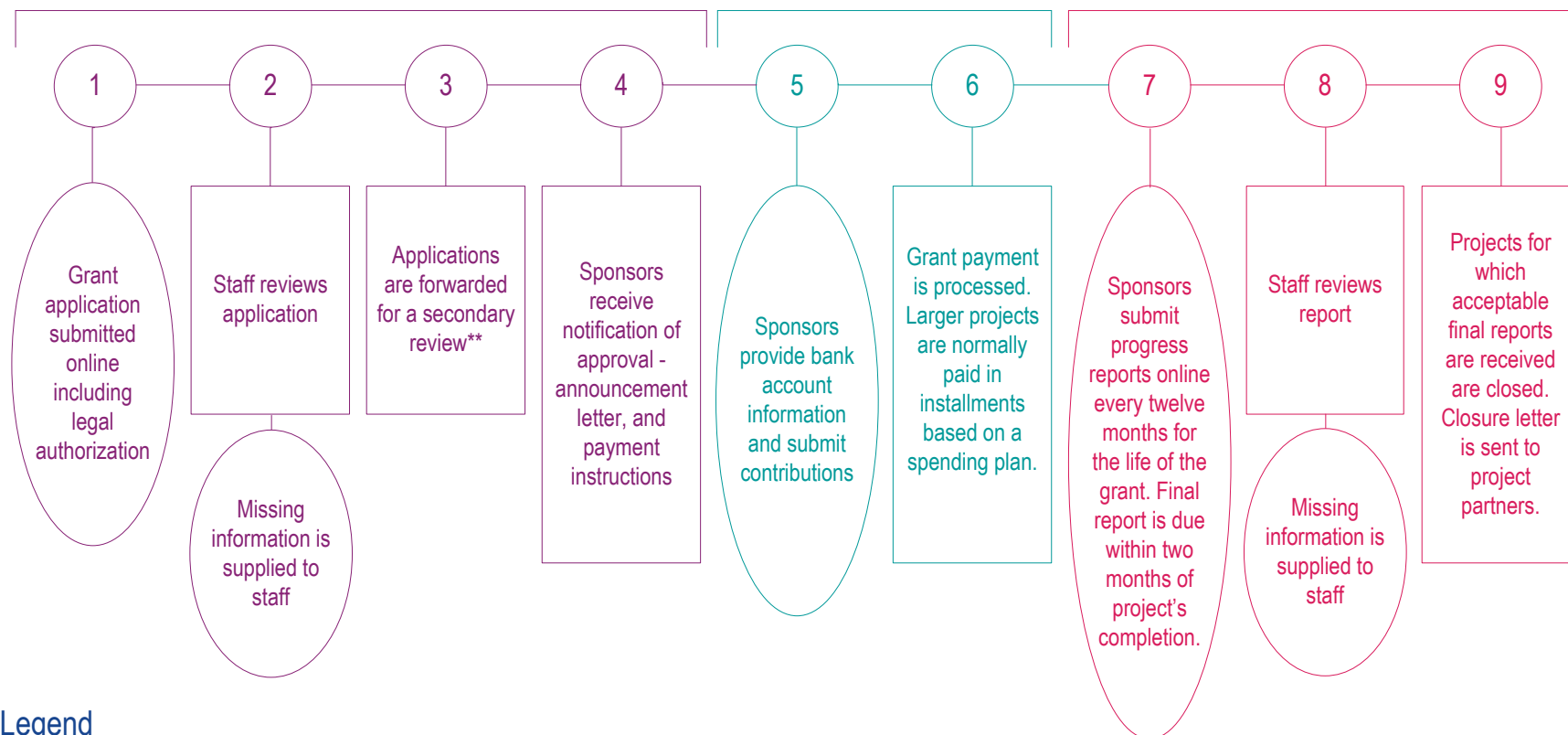
If application arrives at TRF complete, time from receipt to approval of application is approximately 4 weeks.*

Payment Phase

From time that TRF receives bank account information and contributions, processing of payment takes approximately 2-4 weeks.*

Reporting Phase

Staff review reports in the order in which they are received within 8 weeks of receipt at TRF.*



Legend

 = Rotarian action

 = TRF action

* Timeframe may be longer during peak times.

** Applications requesting a match of more than \$50,000 are reviewed by the Cadre. Applications requesting a match of more than \$100,000 are reviewed by the Trustees.

PROMOTING ROTARY'S PUBLIC IMAGE

Session 4

Facilitators:

RPIC Kathy Fahy

RPIC Eric Liu

RPIC Linda Peterson



ROTARY PUBLIC IMAGE COORDINATOR

How RPICs can support you and your district:

1. Public Relations
2. Marketing
3. Social Media

LEARNING OBJECTIVES

By the end of this session, you will be able to:

- Identify the qualities and skills of a successful district public image chair
- Communicate the importance of Rotary's People of Action campaign
- Use Rotary's public image resources



What are some
misperceptions
that the public
may have about
Rotary in your
district?

SELECTING A PUBLIC IMAGE CHAIR

Communications
strategy and
planning

Social media

Marketing

Public relations

Media relations

Creating media
partnerships

Media planning,
purchasing
advertising

Sharing
resources and
training others

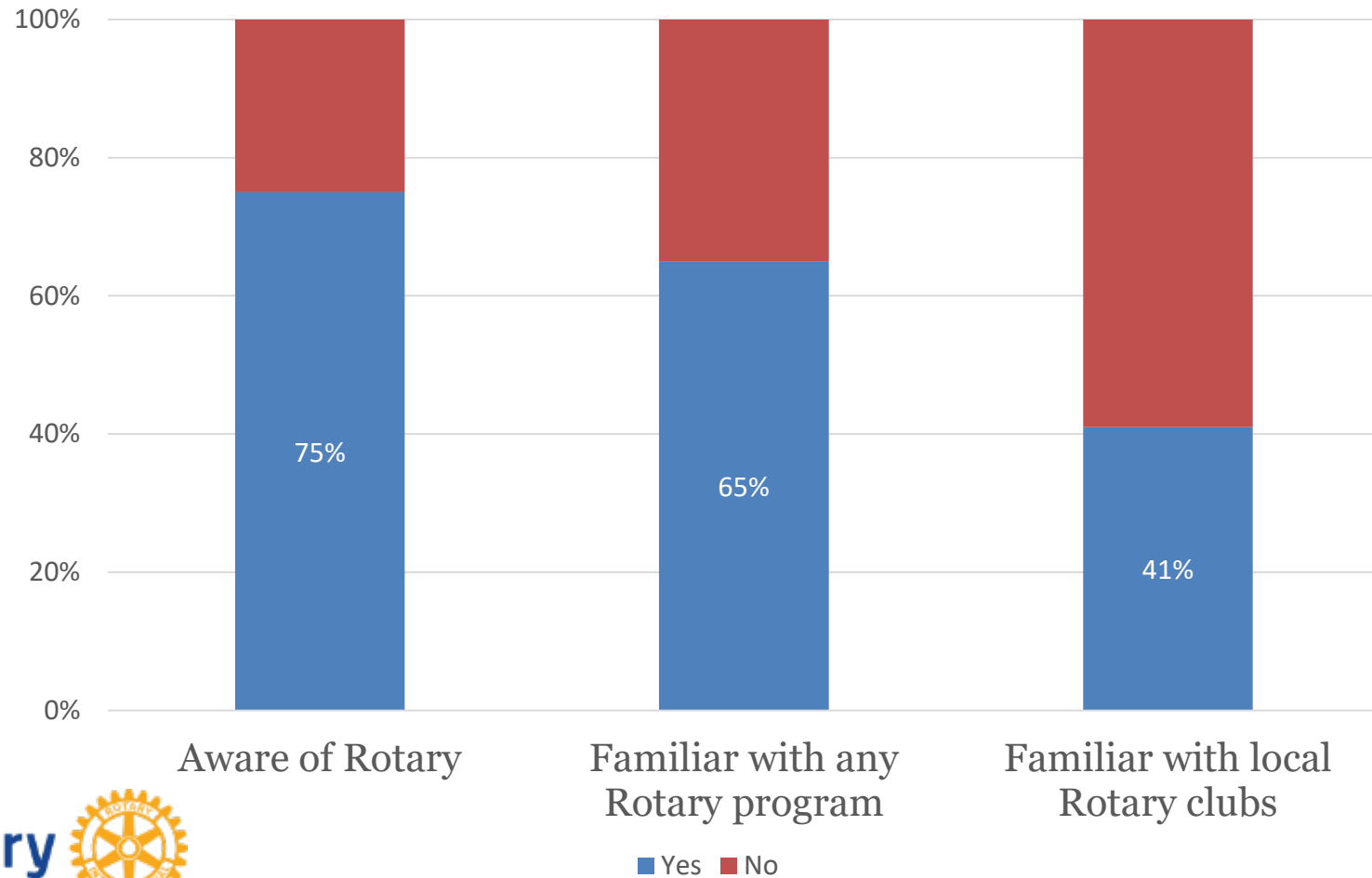
Marketing and
communications
for nonprofits

How do your clubs share their stories about the impact they've had in their communities?



PUBLIC IMAGE RESEARCH FINDINGS (2015)

Global Rotary Recognition



PEOPLE OF ACTION



BRAND CENTER



People of Action resources:

- Guides and ad templates
- Videos and radio ads
- Outdoor ads

Plus guidelines for:

- Websites
- Social media
- Event planning
- Public relations

ACTIVITY: TELLING YOUR PEOPLE OF ACTION STORY

- Think of a recently completed service project in your district.
- Answer the worksheet questions.
- Share your People of Action story with a partner.

REFLECT

How did this exercise affect the way you told this story?



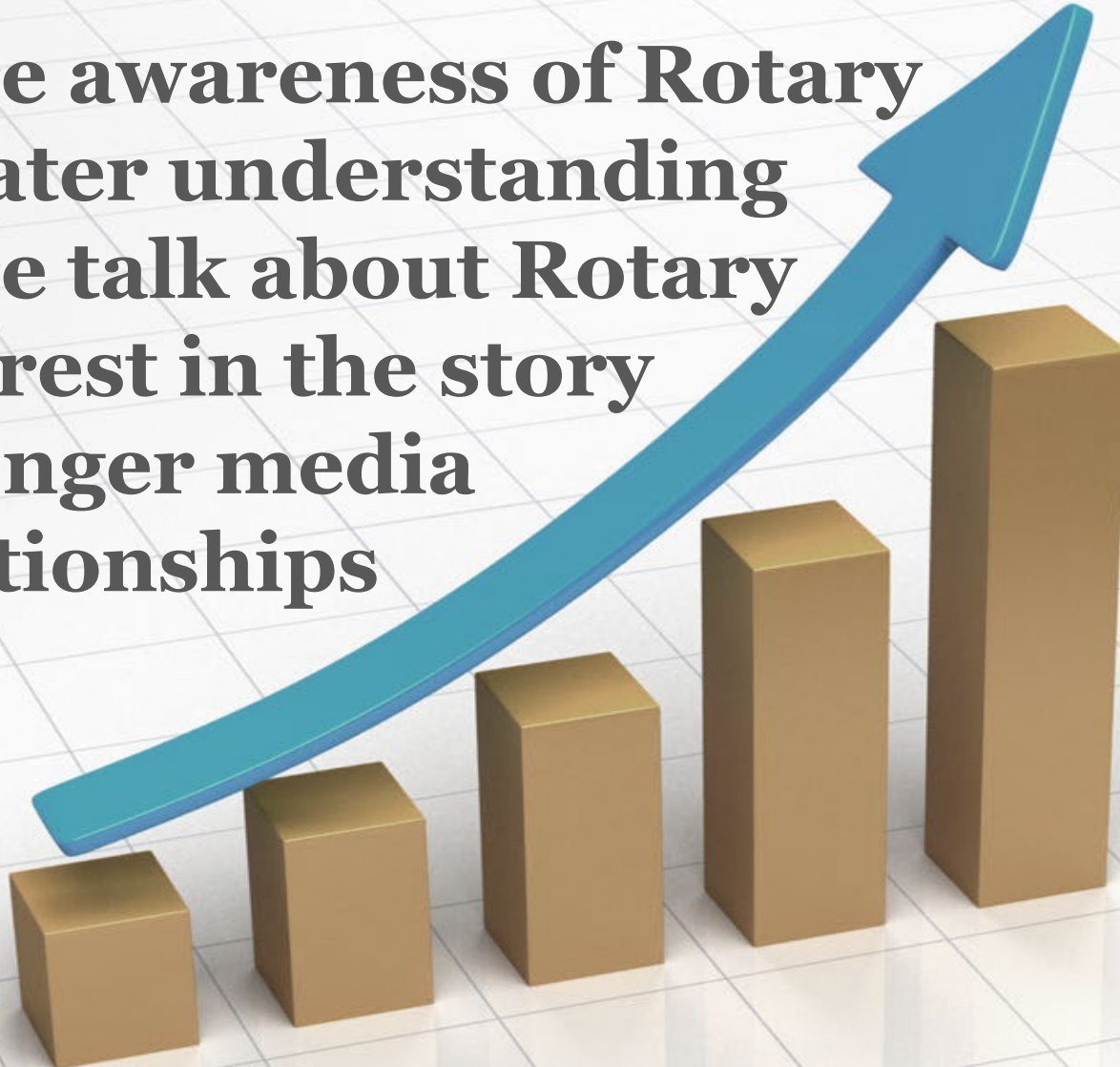
Answer this question in your workbook and then discuss.



What is one
specific goal you
will set for your
public image
efforts?

ASSESS YOUR IMPACT

- **More awareness of Rotary**
- **Greater understanding**
- **More talk about Rotary**
- **Interest in the story**
- **Stronger media relationships**



SHARE YOUR STORIES

Share your People of Action
stories with Rotary at
pr@rotary.org



Rotary's impact in communities around the world is strengthened by its public image – the consistent voice and visual identity that underscores the character of Rotary's brand.

To best fit your district's unique set of challenges and opportunities, use the guide below to inform a customized district communications strategy.

Three Pillars of Communications

Communication strategies are supported by three fundamental pillars: public relations, marketing, and social media.

Public Relations

- The way we engage with external stakeholders – using our message, voice, and visual identity – defines how Rotary is perceived by our partners and the public.
- Positive public relations help our organization grow and drive change in the world.
- Engagement over a wide range of media using clear messaging and compelling visuals helps Rotarians receive recognition for the work they continue to accomplish.

Marketing

- Rather than engaging when an opportunity presents itself, marketing is proactive and dynamic outreach.
- Competition thrives even among service organizations, and Rotarians must be prepared to actively share Rotary's story and value with non-Rotarian audiences.
- To foster a strong perception of Rotary, Rotarians must lead as brand ambassadors by offering a consistent visual identity in print and digital media.

Social Media

- More audiences are using social media platforms to find out about events, stories, causes, and community activity in their area and globally.
- Social media users are a younger group that Rotary is continuously looking to engage.
- By being active on Facebook, Twitter, Instagram, or other social media platforms, organizations can become better connected to the communities they serve.

Resources

The resources below can be found in the [Brand Center](#) on MyRotary:

- [Voice and Visual Identity Guide](#)
- [Messaging Guide](#)
- [Quick Start Guide for Club Websites](#)
- [Event Planning Guide](#)
- [Event Banners \(Promotional Resources\)](#)
- [Club Brochure Template](#)
- [District Public Image Seminar Guide](#)

Communications Action Planning

Use the template below to structure your goals and make a plan for reaching them.

Goal: Secure media mentions of activity in your district.

Tactic:
Get to know reporters in your area.

Action steps:

1. Identify key local and regional publications.
2. Approach journalists strategically. Make sure to only present reporters with stories that fit their publication and topic they cover.
3. Engage media in club events: for example, invite a journalist to participate in an event or serve as master of ceremonies.

Person responsible:

District public image chairs (DPICs) or District governors.

Timeline:

Cultivating and maintaining relationships is a long-term process. Before the start of your term, be sure to consult your predecessor for any information on past relationships, media placements, or opportunities for growth.

Goal:

Tactic:

Action steps:

Person responsible:

Timeline:

Goal:

Tactic:

Action steps:

Person responsible:

Timeline:

Goal:

Tactic:

Action steps:

Person responsible:

Timeline:

GETS WORKSHEET

TELLING YOUR PEOPLE OF ACTION STORY

During your year as governor, clubs throughout your district will have opportunities to promote Rotary to members of your community. You want to encourage them to tell a story that shows how they identified a challenge, worked together to address it, and made an impact locally. Once you understand how to tell a People of Action story, you can help clubs in your district do the same.

Choose a service project from the last year that you believe shows a Rotary club from your district making a real impact locally.

PEOPLE of ACTION

PROJECT:

Imagine you've been contacted by a local news organization to explain Rotary's impact in the community. Consider the following questions to help you develop your People of Action story. Take notes in the spaces provided. Then share your story with a partner.

1. What problem or challenge in your community was this project designed to solve?

2. How did the club take action to solve the problem?

3. What was the impact of this project? In other words, how did the club improve the lives of people in your community? Try to provide at least two key outcomes and statistics to support your answer.

4. Who do you want to hear this story?

5. What do you want the people who hear this story to do? (Learn more? Donate to your cause? Join you at an upcoming event? Visit your website or your social media channels?)

AFTER GETS

In the coming year, consider the many opportunities your clubs will have to promote Rotarians as people of action. Here are a few ways you can make the People of Action campaign more successful:

- Contact the club you were thinking about during the activity and ask officers if they have used this story for a People of Action ad — if not, ask them if they would consider creating one.
- Tell stories about Rotarians in your district as people of action during your club visits.
- Work with your public image committee to inspire your clubs to use the campaign. Challenge each of them to develop a People of Action ad during your year as governor.
- Share your successes with Rotary at pr@rotary.org.



STRENGTHENING YOUR MEMBERSHIP



Session 5

Facilitators:

RC Dian Edwards

RC Debbie High

RC Shannon Scheffel





ROTARY COORDINATOR

How the RC can work with you and your district:

1. Attracting New Members
2. Embracing Club Flexibility
3. Filling Leadership Positions

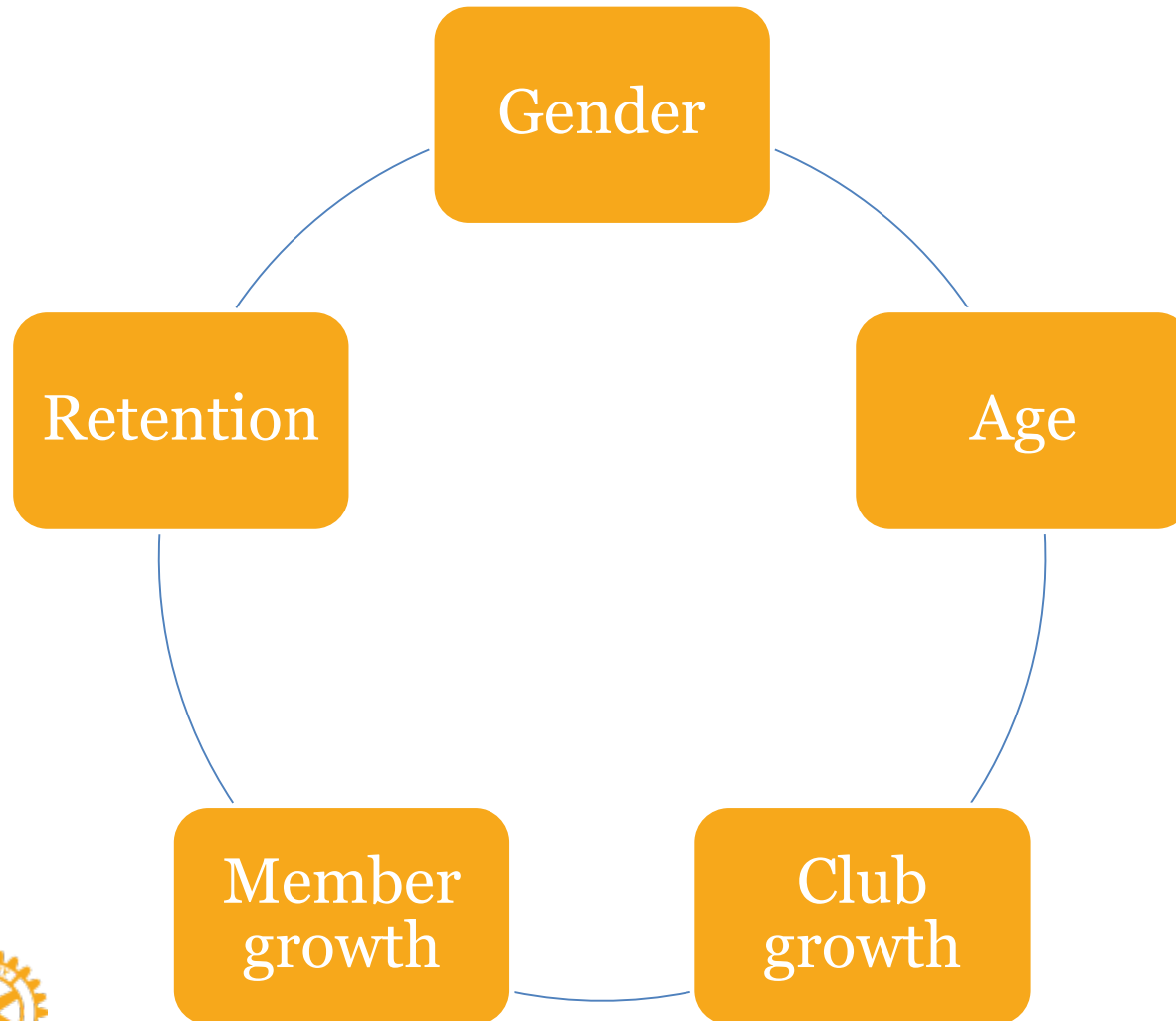
LEARNING OBJECTIVES

- New Club Development
- Club Flexibility
- Club Creation Strategy Exercise
- Nurturing New Clubs
- Resources

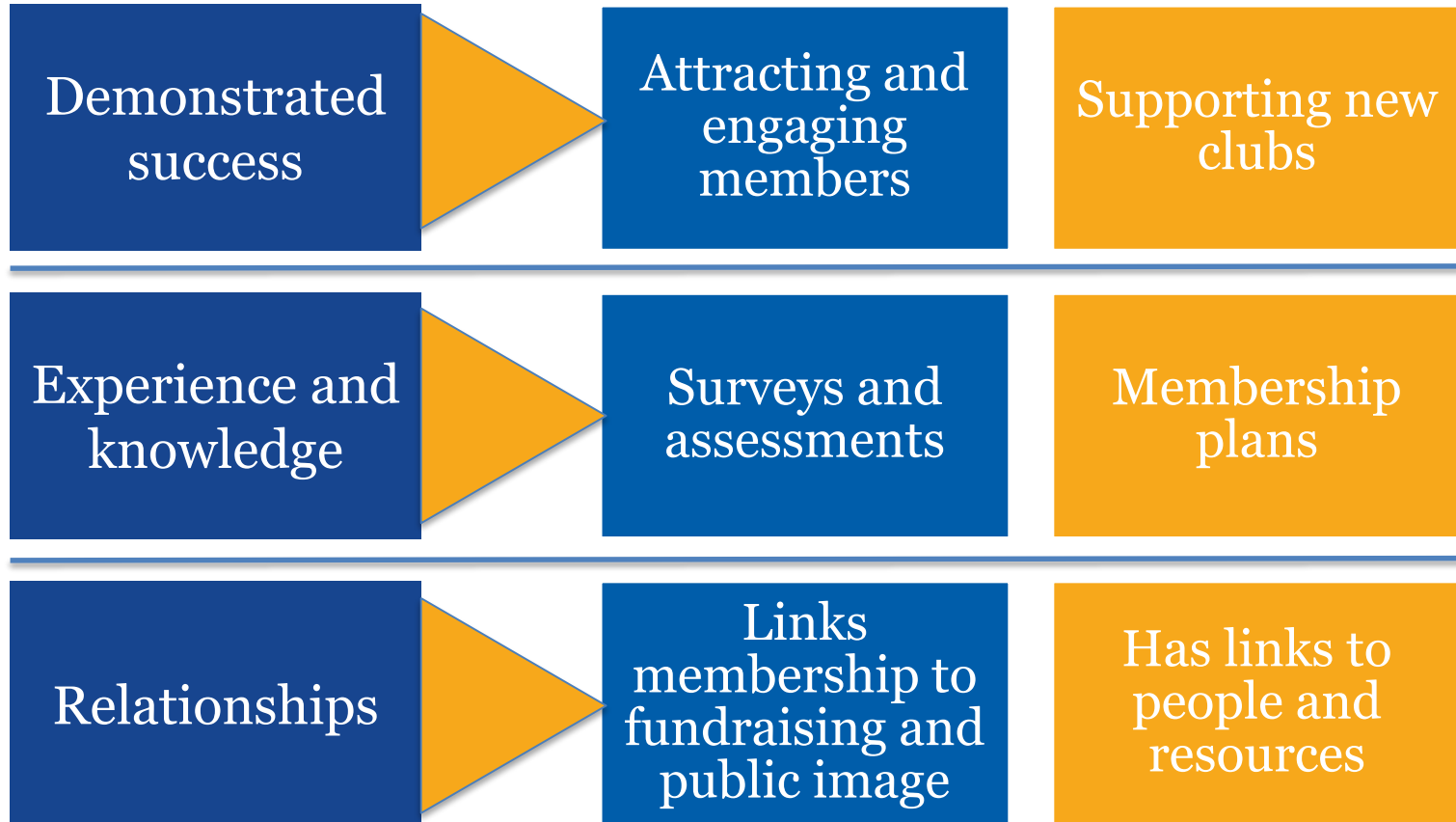


What are your membership goals?
What is your plan to achieve them
during your governor year?

MEMBERSHIP MEASUREMENTS



SELECTING A MEMBERSHIP CHAIR



Why is it
important for
clubs to evaluate
how they attract
and engage
members?



CLUB HEALTH AND GROWTH

Resources available on My Rotary



ROTARY CLUB HEALTH CHECK



MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

- ☐ Satisfied
- ☐ Somewhat satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Dissatisfied

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

		Somewhat	Neither agree nor	Somewhat	
--	--	----------	----------------------	----------	--

Rotary

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Step 1: Evaluating Your Club

-

-

-
-

STRENGTHENING THE POLICE AND JUDICIAL SYSTEM

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23

- Evaluating your club
- Creating a club vision
- Attracting new members
- Engaging members
- Improving public image
- Supporting new clubs

MEMBERSHIP LEADS

- Professionals who want to join
- Screened by Rotary
- More women and young professionals



HELPING CLUBS ADDRESS THEIR MEMBERSHIP CHALLENGES

With your group, review **one** of the following scenarios. On the following page, describe a membership challenge the club might face, and determine at least one strategy and one resource (person or publication) that may help the club address it. Then identify how you would work with the club to help it meet its goal.

Scenario 1

One of your evening clubs has consistently connected with younger professionals in the area. They regularly induct 2 or 3 new members each year but lose the same number, due to conflicting obligations such as work and family. The club's new president has come to you seeking advice on how her club can keep members from leaving due to other obligations and otherwise grow its membership.

Scenario 2

Your district includes a club with well-respected business and community leaders. They consistently donate to the Foundation and partner with another club to conduct the same service project every year. Because of their consistency, the club does not believe it has a membership challenge. Yet there has been very little change to their membership roster, and you have noticed that every member of the club is over 60 years old.

Scenario 3

A club in your district has a few dedicated members who usually fill the leadership roles. The other members attend and pay their dues but rarely volunteer to help with projects, serve in leadership positions, or otherwise get involved. The club leaders know that the club isn't accomplishing all that it could but don't know how to address the problem.

Scenario 4

One of your club membership chairs has noticed that a number of small businesses in the area are owned and operated by women, but his club has few female members. He believes his club is open to inducting more women, but he worries that the current gender imbalance and some members' attitudes and comments may put off potential candidates.

Scenario 5

One of your clubs has made an effort to invite more women, younger professionals, and recent retirees to their meetings. Nevertheless, they have not seen a significant change to their membership numbers in the last five years. None of the groups of people they are reaching out to seems interested in joining a Rotary club, and club leaders don't know where else to look for prospective members. The club's board has reached out to your team for help.

Describe a membership challenge this club might be facing.

Describe at least one strategy that could strengthen this club's membership.

List at least one resource (person or publication) that could offer the club additional strategies.

How would you and your district team support the club?

How and when would you follow up with the club to determine if any progress has been made based on your suggested strategies?

GROW ROTARY

Session 5 (Continued)

Facilitators:

RC Dian Edwards

RC Debbie High

RC Shannon Scheffel



What does the phrase
“Grow Rotary” mean
to you?



GROWING ROTARY



- Support traditional clubs
- Develop new club models



KEY OUTCOMES

Realize our clubs must improve their
club culture and club experience
to attract and retain Rotary members
and form new clubs.

CLUB MODEL TYPES

- TRADITIONAL
- E-CLUB
- SATELLITE
- PASSPORT
- CAUSED-BASED
- ALUMNI-BASED
- CORPORATE
- ROTARACT



SUN = WILD

CUSTOMIZED CLUB DESIGN

Rotary Club of Seaford, Australia

- Meets twice monthly
- Rotates meeting location – Rotarian's home, restaurant, hotel, bookstore, or coffee shop.
- Speakers are the exception, not the rule
- Main focus is service projects

Twin Cities Rotary EcoClub, MN, USA

- Theme-based club devoted to environmental issues
- Focus on positive impact and fun through service and socials
- “young adults & young thinkers of all ages”
- Low cost dues
- Fewer meetings, more action

Rotary “Ambassadors” Club, Kansas, USA

- 20 member capacity
- Meets twice monthly- online meetings and Sunday cocktail hours
- Quarterly home hosted Saturday night dinner
- Partner membership
- Paul Harris Society donors
- 3 projects annually

Rotary Club of Cross Timbers, TX, USA

- Listed what they felt would be the ideal clubs and chartered at 62 members and grew to 100 in a year
- Meets mid morning on Fridays after breakfast and taking kids to school
- Heavy emphasis on different forms of fellowship
- “Perfect engagement, not perfect attendance
- “No drama”
- Records every meeting for ease of access



What Would Be Your Ideal Rotary Club?

CLUB MODEL TYPES

- TRADITIONAL
- E-CLUB
- SATELLITE
- PASSPORT
- CAUSED-BASED
- ALUMNI-BASED
- CORPORATE
- ROTARACT

CLUB MODELS

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves. The criteria for membership are simple. For Rotary clubs, a member needs to be an adult — or for Rotaract clubs, a person age 18-30 — who demonstrates good character, integrity, and leadership; has a good reputation within their business or profession and community; and willing to serve in the community or have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

Club Model	Description	Appeals to	Minimum number of charter members
<u>Traditional Rotary Club</u>	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and traditions Learn more at <u>Start a Club</u> .	20
<u>Satellite Club</u>	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time other than what's offered by the traditional clubs in the area Learn more in the <u>Guide to Satellite Clubs</u> .	8
<u>E-Club</u>	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience Learn more about <u>online club meetings</u> .	20
<u>Passport Club</u>	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people Learn more in the <u>Guide to Passport Clubs</u> .	20
<u>Corporate Club</u>	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community	20
<u>Cause-Based Club</u>	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems.	20
<u>Alumni-based Club</u>	A club whose members (or most of them) are former Rotary or Rotary Foundation program participants	People who have participated in Rotary outside of a club	20
<u>Rotaract Club</u>	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service. Learn more in the <u>Rotaract Handbook</u> .	n/a

All club models meet at least twice each month. With exception of Rotaract clubs, all active members pay US\$68.00 in annual dues, are counted in Rotary International's database, and have voting privileges.

PEOPLE OF ACTION PLANNING TOOL

Use the
People of Action
Planning Tool
when developing
a new club

PEOPLE OF ACTION PLANNING TOOL FOR ROTARY CLUBS

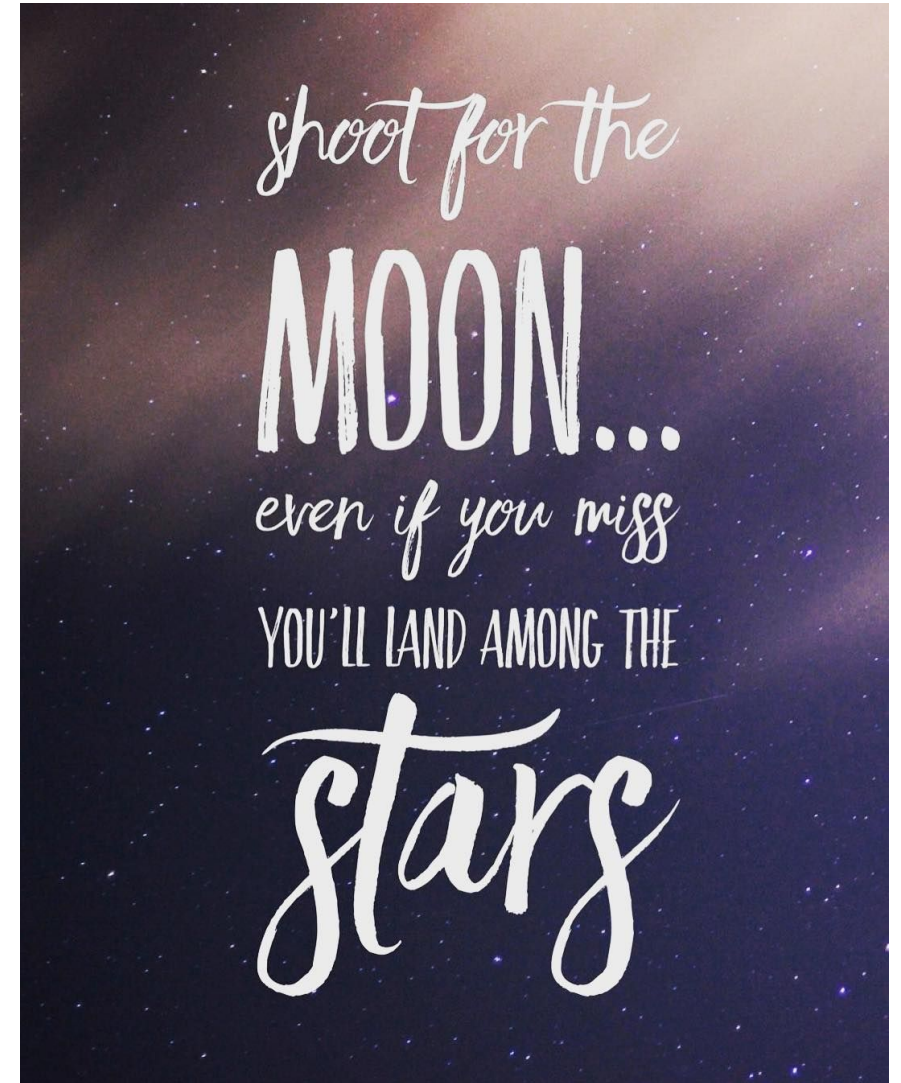
Club name <i>New Towne Rotary Club</i>	Who are the champions and leaders? <i>Co-Chairs: Mary Smith and Paul Harris</i>	From whom do we need buy-in? <i>Board, Club Members, Park Governing Body, Neighbors</i>	Who needs regular updates? <i>Board, Club Members, Park Governing Body, Neighbors</i>
Describe- <ul style="list-style-type: none"> • Concept • Idea • Project • Event • Challenge 	How will you include Rotary Brand focus: <ul style="list-style-type: none"> • Express clear Rotary club identification • Build pride for members • Inform the public & community about the project/event • Inform public & community about the club 	How will you include Membership focus: <ul style="list-style-type: none"> • Attract prospective members • Engage current members • Build connections & friendships 	How will you include Foundation focus: <ul style="list-style-type: none"> • Increase participation in projects • Share impact • Encourage giving • Provide recognition • Celebrate! • Attract future partners & donors
Rotarian at Work Day April 25, 2020 Local park that needs clean-up and rehab	<ol style="list-style-type: none"> 1. Create signage using your club's Rotary logo 2. Wear Rotary apparel or a special People of Action shirt for the event 3. Provide updated club brochures at the event 4. Share widely on social media platforms in advance 5. Use Facebook Live to share the action and results of the project 6. Take lots of photos to use as People of Action posts and print ads 7. Involve the media 	<ol style="list-style-type: none"> 1. Get all members on board and excited! 2. Members invite family and friends to the event 3. Invite another club to participate 4. Involve Interact and Rotaract and Alumni 5. Promote the event well in advance and invite neighbors and city officials 6. Keep a sign in sheet for participants and invite them to the club to thank 7. Celebration at end to thank volunteers 	<ol style="list-style-type: none"> 1. Use a district grant 2. Include Polio information at sign in table and in brochure/purple pinkies at sign in or at celebration 3. Recognize financial sponsors with Paul Harris recognition at the club after event 4. Include the club's grant projects in social media 5. Can this be part of a larger project in the future using Foundation?

NURTURING NEW CLUBS

- Notify existing clubs in the area
- Identify leaders/leadership for 3 years
- Be available for support and motivation
- Address conflict early
- Keep members engaged
- Celebrate success
- Utilize resources



Zones 26 & 27
Big West



GROWING ROTARY AS A TEAM



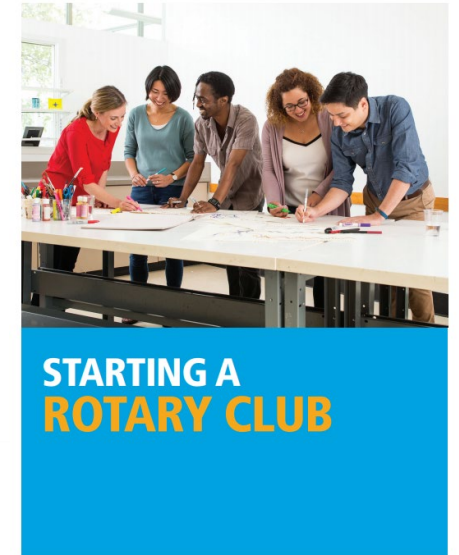
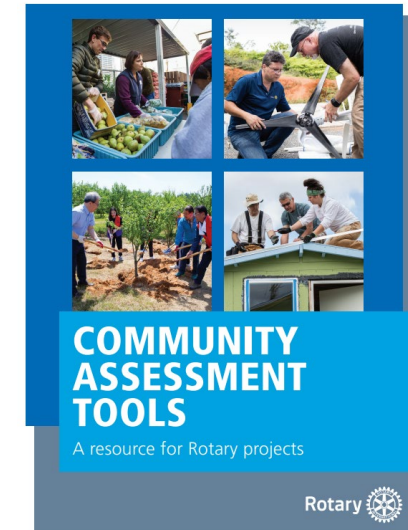
- Enlist specific members of your district team.
- Be available for support and motivation.
- Review the new club resources.
- Work with Rotary staff members.

RESOURCES

- Starting a Rotary Club
- *Start a Club, Membership, and Flexibility* pages on My Rotary
- Membership page on <https://zone2627.org/>
 - Including People of Action Planning Tool
- Data & Membership Reports
- Community Assessment Tools
- RC, ARC, RMO, and CDS



Zones 26 & 27
Big West



JOIN LEADERS: [Rotary.org](https://rotary.org)
800 691-0175

MEMBERSHIP RESOURCE GUIDE

The names of hyperlinked resources appear with an underline and usually in a blue font and can be downloaded on www.rotary.org by clicking on the hyperlink, or ordered on shop.rotary.org with the SKU number provided. If you experience any trouble when placing your order, please email membershipdevelopment@rotary.org or shop.rotary@rotary.org.

PUBLICATIONS			
Name	Description	Audience	Available
Strengthening Your Membership	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents and membership committees, and district membership chairs	http://shop.rotary.org/ (SKU: 417)
Starting a Rotary Club	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors	N/A
Introducing New Members to Rotary	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership	http://shop.rotary.org/ (SKU: 414)
Be A Vibrant Club	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership	http://shop.rotary.org/ (SKU: 245A)
Connect for Good	Eight-page guide shows how to get involved and connect with Rotary.	Current members	http://shop.rotary.org/ (SKU: 595)
Rotary Basics	This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.	New members	http://shop.rotary.org/ (SKU: 699)
Impact Begins With You	This prospective member brochure explains who we are and what sets us apart from other organizations.	Prospective members	http://shop.rotary.org/ (SKU: 001)

LEARNING CENTER: ONLINE COURSES			
Name	Description	Audience	Available
New! Leading Change	Learn the basics of change management, including how to succeed in leading change, how to assess people's readiness to make changes, how to plan for change, and how to respond to any resistance.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Rotary Basics	Meet members around the world, watch videos, deepen your understanding of Rotary, and test your Rotary knowledge in this course. While designed for new members, it's a good refresher for long-time members.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Club Membership Committee Basics	Learn more about your responsibilities in developing your club's strategic membership plan to attract and engage members.	Club membership committee members	http://rotary.org/learn (log in My Rotary account required)

Your Membership Plan	Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Best Practices for Engaging Members	Is your club losing more members than it's gaining? It's time to get serious about engaging members.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Kick-start Your New Member Orientation	Are new members leaving within a year or two? Learn how to better connect with them and help them get involved from the start.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Practicing Flexibility and Innovation	If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Building a Diverse Club	A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Online Membership Leads	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Is Your Club Healthy?	Take this course to help your club stay valuable to your members and your community.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Strategies for Attracting New Members	Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors.	Rotary members	http://rotary.org/learn (log in My Rotary account required)
Alumni Report Guide	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership	https://my.rotary.org/en/document/how-use-program-participants-and-alumni-report

TOOLS			
Name	Description	Audience	Available
Membership Best Practices Discussion Group	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members	https://www.rotary.org/myrotary/en/exchange-ideas/groups/membership-best-practices
Rotary Club Health Check	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders	http://shop.rotary.org/ (SKU: 2540)
Membership Assessment Tools	Learn how to evaluate and improve your membership development plan with these tools, complete with sample surveys and information on organizing new clubs, recruiting and retaining members.	Current members	http://shop.rotary.org/ (SKU: 801)
Customizable Rotary Club Brochure	In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials.	Prospective members	N/A
How to Delegate Your Online Access	As a club or district officer, you can temporarily delegate your level of access in My Rotary to another member for assistance in managing Rotary business online.	Club and District leaders	https://my.rotary.org/en/document/how-delegate-your-online-access
New! Club Planning Assistant	This web-based interactive tool allows clubs to explore possible solutions to their biggest challenges by offering customized strategies and resources.	Club leaders	https://rotary.qualtrics.com/jfe/form/SV_8798Eo0G6otlbsV

RESOURCES			
Name	Description	Audience	Available
Starting a Club webpage	Find information and resources about the process of starting a Rotary club	Rotary members	https://my.rotary.org/en/learning-reference/learn-topic/start-club
New! Guide to Corporate Membership	This guide describes the benefits of corporate membership and how to use it in your club.	Rotary members	https://my.rotary.org/en/document/guide-corporate-membership
Guide to Satellite Clubs	This guide describes the benefits of a satellite club and how to start one.	Rotary members	https://my.rotary.org/document/guide-satellite-clubs
New! Guide to Passport Clubs	This guide describes what a passport club is, how it works, and what the benefits are. Sample bylaws included.	Rotary members	https://my.rotary.org/en/document/guide-passport-clubs
New! Rotary Club Models Matrix	This guide provides a high-level overview of different club models in the Rotary world.	Rotary members	https://my.rotary.org/en/document/club-types
Club Membership Committee Checklist	Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives.	Rotary Members	N/A
Engaging Young Professionals Toolkit	This online toolkit can help clubs connect with Young Professionals by first understanding them. Topics included are characteristics of your audience, your club's culture, ideas for outreach and engagement, and the long-term benefits of becoming a Rotarian.	Rotary Members	N/A
State of Rotary's Membership power point	Understand the current State of Rotary's Membership: how we got here, who is joining, who is leaving — and the opportunities that exist to strengthen membership.	Rotary Members	N/A
Club Flexibility web page	This web page offers ways clubs can implement the new flexible options Council decisions granted them. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members	N/A
“Discover Rotary” Power Point	Show this presentation at prospective member or other events to introduce Rotary to the public. It covers Rotary's values, history, and the benefits of membership.	Prospective members	N/A
Understanding Membership Reports: Getting Started	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members	N/A
Creating a Positive Experience for Prospective Members	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members	N/A
Proposing New Members	Best practices for proposing new members to your club.	Rotary members	N/A
How to Manage Membership Leads (Clubs)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-clubs
How to Manage Membership Leads (Districts)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders	https://www.rotary.org/myrotary/en/document/how-manage-membership-leads-districts

New Member Welcome Kit	Welcome new members to your club with pre-packaged Rotary essentials: Connect for Good brochure, What's Rotary? card, RI/TRF Annual Report, and Proud Member window cling.	New members	http://shop.rotary.org/ (SKU: 426)
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders	www.rotary.org/en/new-s-features/newsletters
Strategic Planning Guide	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders	https://www.rotary.org/myrotary/en/document/strategic-planning-guide

WEBINARS			
Name	Description	Audience	Available
Courageous Leadership	Using stories of transformation from Rotary and in their professional careers, hear trainers Louisa Horne and Doug Logan outline strategy for clubs on creating a vibrant membership experience. One that is irresistible to both members and visitors.	Rotary members	https://vimeo.com/channels/rotarymembershi p/327063526
Membership Models for the Future of Rotary	Associate and corporate memberships, passport, satellite, and hybrid clubs: these are just some of the innovative, flexible models that clubs have designed recently. Panelists on this webinar discuss the challenges, benefits, and lessons of designing a club experience that works for every member	Rotary members	https://vimeo.com/channels/rotarymembershi p/304737887
Building New Clubs Together	This webinar will be helpful if you believe that adding a new Rotary club in your community will broaden your capacity for service, think a satellite club may allow more prospective members to engage with Rotary, or want tips on how to charter a Rotaract club, or encourage Rotaractors to start their own clubs.	Rotary members	https://vimeo.com/channels/rotarymembershi p/284246603
Hot, Warm, and Cold Leads: Engaging Your Prospective Members (Club Level)	Rotary volunteers and staff share best practices in communicating with prospective members, ensuring their Rotary experience is positive, and managing and admitting them through the Membership Leads platform.	Club leaders	https://vimeo.com/240685013
First Impressions Matter webinar: The Membership Experience	Find out what happens when Rotarians use every interaction to engage, educate, and inspire fellow Rotarians and the community. Moderated by Jennifer Jones, Past Rotary Vice President.	Rotary members	https://vimeo.com/232717098
How to Manage Membership Leads for District Leaders	This webinar shows district leaders how to effectively utilize the Membership Leads platform, provides best practices for encouraging clubs to take action with leads, and includes a Q&A section with attendees.	District leaders	https://vimeo.com/214073740
Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members	https://vimeo.com/180066536

TRAINING MANUALS & DOCUMENTS			
Name	Description	Audience	Available
District Membership Seminar Leader's Guide	This guide provides you with speaking points, PowerPoint templates, and exercises to ensure your attendees participate and are engaged in each breakout session for club leaders or members.	District leaders	N/A

District Membership Committee Terms & Responsibilities	This sheet explains the district membership committee's purpose, chair appointment, qualifications, duties, and responsibilities.	District leaders	N/A
Lead Your District: Committee Chair	Use this manual to set up and run an effective district committee	District leaders	N/A

Questions? Please contact Regional Membership Officer for zones 29 and 25B
Emily Tucker | Emily.Tucker@rotary.org | +1-847-866-3258



CONNECTING WITH CLUBS

Session 6

Facilitator:

PDG Lisa Faith Massey



LEARNING OBJECTIVES

By the end of this session, you will be able to:

- Determine the best ways to communicate with clubs
- Develop a plan to give your club visits the greatest impact



What is an example of great district communication that you have seen? What made it appealing?

YOUR MONTHLY COMMUNICATION

Newsletter

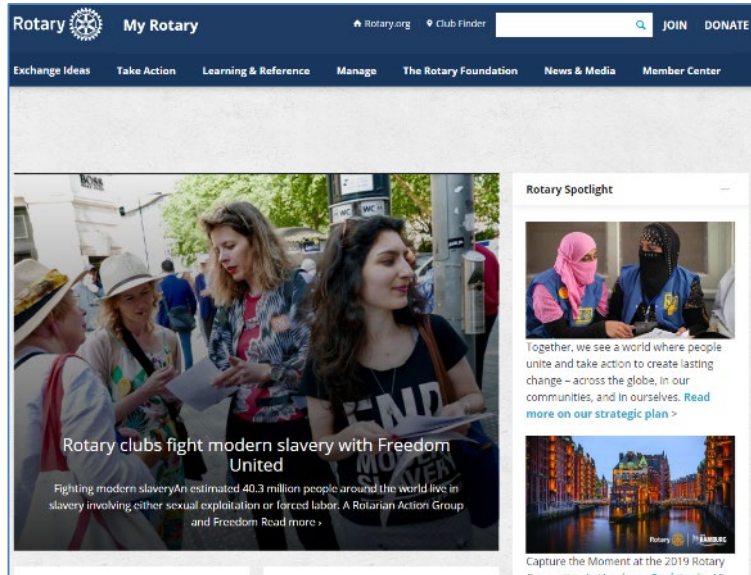
Blog

Video

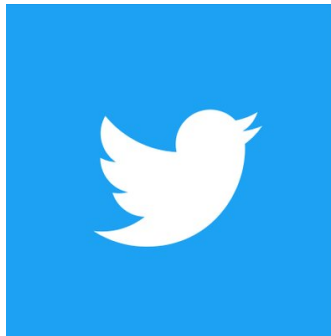
Email



ENHANCE YOUR CONTENT



the **rotarian**® 



2019

MAXIMIZE THE IMPACT OF YOUR DISTRICT WEBSITE

- Is contact information easy to find?
- Is the site free of Rotary jargon?
- Are there pictures?
- Are there distinct areas for members and nonmembers?
- Do you update your content regularly?

Trainer:
Insert a picture of an effective
district website here

PREPARE YOUR COMMUNICATIONS



**Consider how
clubs like to
receive
information**

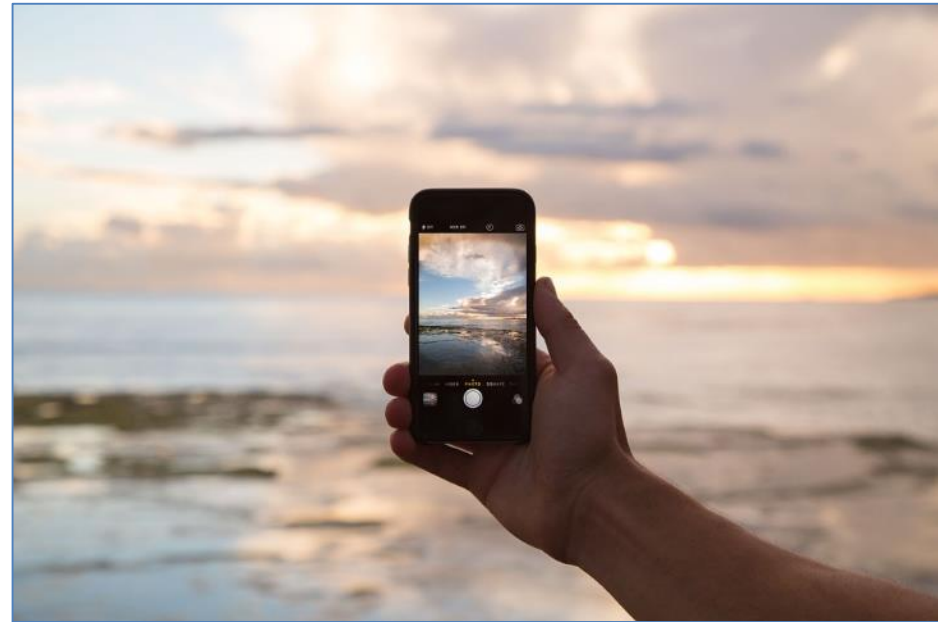
**Develop a
communications
plan**

ACTIVITY: ENHANCING YOUR COMMUNICATION WITH CLUBS

- Work with a team on the communication method assigned to you.
- Review the worksheet's chart of ideas.
- Choose a message, an audience, a sender, and a reason why that method is the most effective for your message.
- Share your work with the group.

REFLECTION

What will be your
primary tool for
connecting with clubs?
Why?



Answer these questions in your
workbook and then discuss.

What makes a club visit engaging?
What makes a club visit ineffective?



ACTIVITY: CLUB VISIT SPEECH

- Work with a partner.
- Alternate delivering 1-2 minutes of a club visit speech that listeners will connect with.
- If you did not draft an outline, do so now.
- Give feedback to your partner.
- Share an example of an effective speech with the group.

REVIEW OF LEARNING OBJECTIVES

By the end of this session, you will be able to:

- Determine the best ways to communicate with clubs
- Develop a plan to give your club visits the greatest impact

GETS WORKSHEET

ENHANCING YOUR COMMUNICATION WITH CLUBS

How will you communicate information to clubs? How will you convey news from clubs to your district team? You'll be assigned one of the communication methods listed below. Consider what kind of messages it's best suited for. Develop your plan by answering the questions as shown in the example. Remember that each question can have more than one answer. The chart lists ideas you might consider.

Methods of communication:

- A message on the district website
- A post on Facebook, Twitter, Instagram, or other social media
- A monthly communication such as a newsletter, a video message, or a blog post
- A phone call
- An email

Example:

- Method: An email
- What is the message? The club attendance policy has changed.
- Who needs to receive it? Club members, club presidents, district leaders
- Who should send the message? Assistant governors
- Why send it this way? The news is timely and important.

Potential messages	Potential recipients/senders	Potential reasons for using this method
Highlighting a great project	Recipients	Information is concise and has good images
Thanking a Rotarian in your district for a significant donation to The Rotary Foundation	Club members in your district	Information could be inspiring for members
Clubs in your district are struggling with attendance and haven't reached their goals	Club officers	Information is timely and important for clubs to know
A club member has been given a prestigious international award	District leaders	The more people you contact, the better
Soliciting opinions from club members on your next district project	Committee members	The content of this message is sensitive
The district conference dates and location have been selected	Rotarians around the world	A dialogue is the best way to be sure everyone understands
	Non-Rotarians (potential members)	
	Senders	
	District governor	
	Assistant governors	
	District chairs	
	Event organizers	

Method of communication:

What is the message?

Who needs to receive it?

Who should send the message?

Why send it this way?



STRATEGIC PLANNING

Session 7

Facilitator: PDG Rich Rowland



LEARNING OBJECTIVES

By the end of this session, you will be able to:

- Explain Rotary's new strategic plan and work with your team to plan for the district's future
- Engage clubs in the strategic planning process

Why is it
important for
Rotary to review
and revise its
strategic plan
periodically?



OUR NEW VISION STATEMENT



Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

OUR NEW STRATEGIC PLAN

Increase
our impact

Expand
our reach

Enhance
participant
engagement

Increase our
ability to
adapt

Refer to appendix 1 of Lead Your
District: Governor.

ACTIVITY: IMPLEMENTING ROTARY'S NEW STRATEGIC PLAN

PART 1:

Thinking of one of the four strategic priorities, write down 2-3 of your district's

- Strengths
- Weaknesses
- Opportunities
- Challenges

PART 2:

- Review how your district already represents one or more of the objectives of the priority
- Strategize how your district can work toward achieving one or more of the objectives of the priority

REFLECT

How do you plan
to communicate
Rotary's new
strategic plan to
clubs?



Answer this question in your
workbook and then discuss.



What will be the greatest opportunity and the greatest barrier to communicating the plan to clubs?

RESOURCES

- District Planning Guide
- Strategic Planning Guide
- Rotary Club Central
- Membership Assessment Tools
- Be a Vibrant Club
- Rotary coordinators
- Assistant governors



GETS WORKSHEET

IMPLEMENTING ROTARY'S NEW STRATEGIC PLAN

Your class of governors is one of the first to serve under Rotary's new vision statement and strategic plan. This means it's a good time to review your district's strategic plan and begin aligning it with the new Rotary priorities.

In this exercise, you'll complete activities related to one of Rotary's four strategic priorities. After GETS, continue this exercise with each of the other three priorities. Share this information with your current governor and governor-nominee, as well as your district team. Together, determine how the district can best understand and represent the new strategic plan and communicate its value to clubs.

You may want to reuse this activity and expand on it if you facilitate a strategic planning or visioning workshop with clubs.

Remember, strategic plans should include these elements:

- Analysis of current condition (What is our district like now?)
- Vision (What do we want to accomplish in a specific time frame — for example, 3-5 years?)
- Strategic priorities and supporting goals (What must we achieve to be the kind of district we want to be?)
- Action plans and definitions of success (How do we reach each goal?)
- Steps to implement the plan, including identifying the people responsible
- Methods for evaluating the plan's success, communicating about progress toward goals, and adjusting the plan if needed

PART 1

You'll be assigned one of the four priorities of the new strategic plan in appendix 1. Then, on the following page, note 2-3 of your district's strengths, weaknesses, opportunities, and challenges that are related to that priority. Keep in mind that strengths and weaknesses are internal to the organization, or within Rotary's control, and opportunities and challenges are external to the organization, or outside Rotary's control.

Priorities: Increase our impact, expand our reach, enhance participant engagement, increase our ability to adapt

Priority:

District strengths (such as diverse membership)	District weaknesses (such as poor public image)

Opportunities for the district (such as new businesses in the area, growing population)	Challenges for the district (such as economic decline in the area, other activities that compete for members' time)

PART 2

Review the objectives under the priority you discussed.

Think about the strengths, weaknesses, opportunities, and challenges you listed in the chart in part 1. Now, write specific examples of how your district already represents at least one of the objectives through your strengths. Then list what your district can do to use its opportunities, or address its weaknesses and challenges, by supporting at least one of those objectives.

Strengths: How does our district currently exemplify this objective?	Weaknesses, opportunities, or challenges: In the future, how can our district work toward this objective?
--	---

Objective	

Objective	

Objective	

Objective	

YOUR SUPPORT FROM ROTARY



Session 8

Facilitator:

John Hannes, RI Club & District Support



Rotary

Club and District Support
Americas | Zone 25B



YOUR KEY CONTACT – CLUB AND DISTRICT SUPPORT (CDS)

www.rotary.org/cds

Provides personalized service, training, and regional guidance on

-  Rotary Resources and Services
-  Administrative Procedures
-  Board Policy and Rotary Constitutional Documents
-  Navigating www.MyRotary.org and Conducting Rotary Business Online



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-  Navigating www.MyRotary.org and Conducting Rotary Business Online



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TBD



PLANNING YOUR EVENTS

Session 9

Facilitator:

PDG Lisa Faith Massey



LEARNING OBJECTIVE

By the end of this session, you will be able to:

Complete your planning and implement innovative ideas for your training seminars and district conference

What makes a
training event
effective?
Ineffective?



CONVENING TRAINING EVENTS



Role-based

Topic-based

FLEXIBILITY IN TRAINING

- Conduct needs assessments
- Combine events
- Hold webinars



MAXIMIZING THE IMPACT OF YOUR TRAINING EVENTS



- Designate conveners and organizers.
- Report your district trainer.
- Stay aware of initiatives and policies.
- Focus on outcomes.
- Use Rotary materials and resources.

ACTIVITY: MAKING A TRAINING EVENT SUCCESSFUL

On the worksheet, complete the first and second columns for at least:

- One role-based training event
- One topic-based training event

Find a partner and discuss:

- A role-based event
- A topic-based event

Share great suggestions with the group.

REFLECT

How will you
implement one of
your partner's
suggestions after
GETS?



Answer this question in your
workbook and then discuss.



What are your
goals for your
district
conference?

DISTRICT CONFERENCE

- Prioritize member engagement
- Widen your audience
- Celebrate new ideas



MAKING A TRAINING EVENT SUCCESSFUL

Choose one role-based training event and one topic-based training event from the lists below. Then, write down a goal and a question you have for each event, and discuss them with your partner. Write down a tip or suggestion from your partner that addresses your question. Then offer a tip or suggestion to address your partner's question.

Role-Based Training Events

EVENT	One goal I have for this event	One question I have regarding this event	Suggestion from partner
District Team Training Seminar			
Presidents-elect Training Seminar (PETS)			
District Training Assembly			

Topic-Based Training Events

EVENT	One goal I have for this event	One question I have regarding this event	Suggestion from partner
Vibrant Club Workshop (replaces the District Rotary Foundation Seminar, District Membership Seminar, and District Public Image Seminar 1 July 2020)			
Grant Management Seminar			
Rotaract District Leadership Training			

POLISHING YOUR PUBLIC SPEAKING

TELL ROTARY'S STORY
WHEN YOU EXPECT TO
SPEAK - AND WHEN IT IS

IMPROMPTU

Session 10

Facilitator: P D G Rich Rowland



LEARNING OBJECTIVES

Know the principles of public speaking

Know the norms in your region and specific location at the time

Develop tools to be comfortable with both prepared presentations and impromptu requests to speak

POLISH YOUR PUBLIC SPEAKING SKILLS

Seven Principles of Public Effective Public Speaking...

Perception

Perfection

Visualization

Discipline

Inspiration

Anticipation

Make it Personal

ON STAGE

You have three minutes to work on a speech.

Deliver the most impactful message you can in one minute.



TAKE ACTION

Consider these ideas in planning for your prepared presentations.

Plan and practice for those impromptu opportunities that will come up.

Use your Rotary Resources to find new information available on an ongoing basis to share as you speak.

PREPARING FOR THE INTERNATIONAL ASSEMBLY



Session 11

Facilitators:

PDG Gary Bren & PDG Judy Hutcherson,
PDG Lisa Faith Massey & PDG Rich Rowland

LEARNING OBJECTIVES

By the end of this session, you will be able to:

- Understand the program and goals of the International Assembly
- Prepare for the International Assembly



What are you
most looking
forward to during
the International
Assembly?

GENERAL SESSIONS



BREAKOUT SESSIONS



CULTURAL EXCHANGE



ROTARY RESOURCE CENTER



PRESIDENT-ELECT PHOTO SESSIONS



EVENING SOCIAL EVENTS



PROGRAMS AND ATTIRE



GOVERNOR-ELECT AND PARTNER MATERIALS

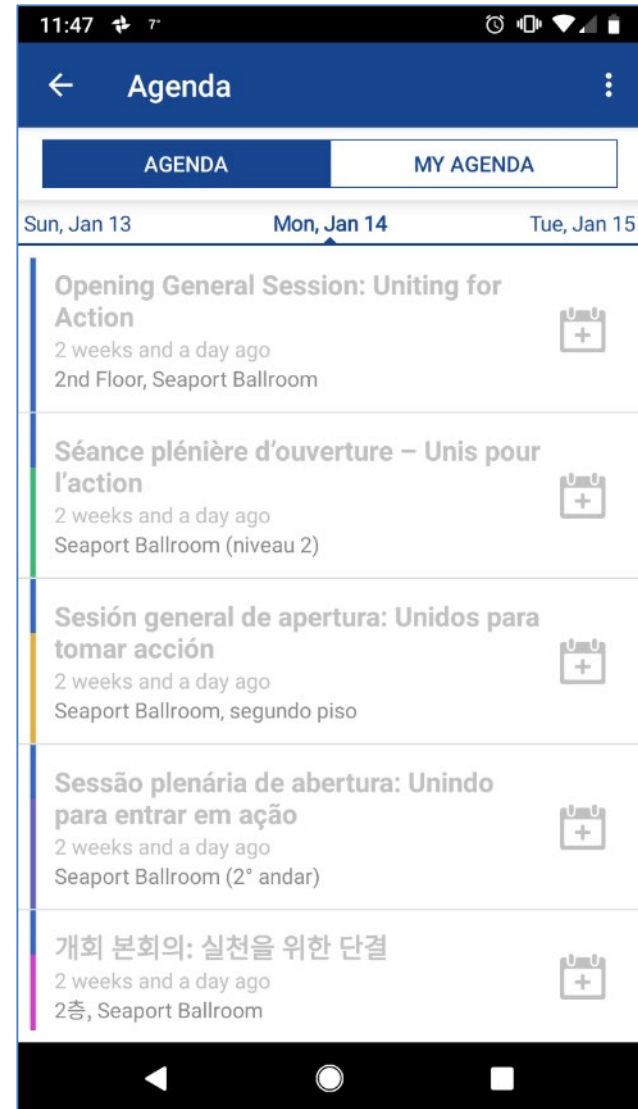
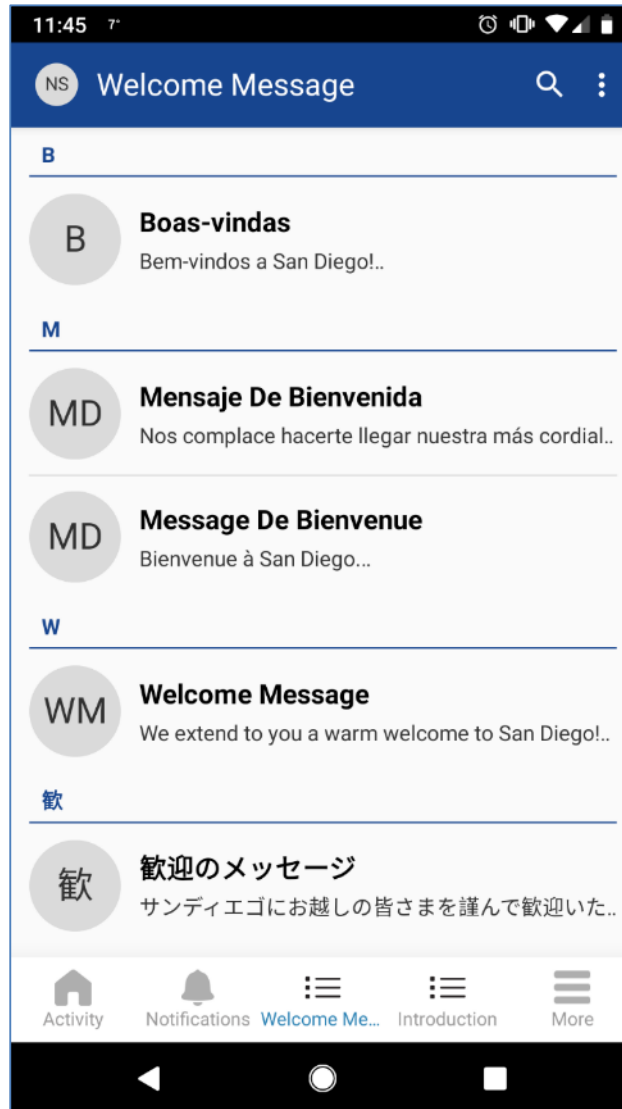
Governor-elect workbook

Presidential theme materials

Rotary Citation requirements

Governor-elect partner workbook

MOBILE APP



HOW CAN YOU PREPARE FOR THE ASSEMBLY?



**Read all
International
Assembly-related
communications**

**Identify learning
opportunities**

**Get to know the
Rotary website and
online tools**

**Consider what other
districts you want
to connect with**

PREPARING PARTNERS — ALL ARE WELCOME!



**Talk with current
governor's partner**

**Prepare questions
and success stories**

**Read Rotary
communications**

**Update contact
information**

What questions
do you have about
the International
Assembly?



DISTRICT FINANCE

Session 12
Facilitator:
PDG Ronney Reynolds





The Financial Responsibilities of being District Governor

July 1, 2019



The Financial Responsibilities of Being District Governor

As a Rotary International District Governor, you have many fiscal responsibilities such as managing the district's finances, monitoring the funds of clubs, practicing good stewardship, and ensuring that the district complies with all local laws, including tax and nonprofit (as applicable).

To create training material concerning the financial responsibilities of being a District Governor as you can imagine was quite a challenge. Not all Rotarians serving as District Governors have had professional training in financial management.

Training material in the following areas were developed by recognizing the challenges you might encounter during your term:

- District and Club Finances
- Rotary Funding for Governors
- Documenting Expenses
- Authorized Expenses
- District Governor Expenses
- Top Eight District Governor Expense Reporting Errors
- Additional Reimbursements-International Assembly
- Risk Management
- Insurance provided by Rotary International
- U.S. Rotary Club and District Liability Insurance Program
- Compliance issues
- Incorporation

Please note, we will not cover all the materials in depth. They should serve as a resource. The session will focus on specific key areas, while responding to your concerns and interests. Any new procedures from Rotary International will be included in the discussion.

I sincerely hope you enjoy your training session and wish you the very best in your service to Rotary International as a District Governor.

Ronald (Ronney) Reynolds, CPA
PDG 2008-2009 District 5870
Rotary Zone 21B-27
Treasurer 2011-2019
E/MGA 2016-2019
Rotary Zones 25B & 29 Institute Chair
ronney@reynoldsfranke.com
512-206-3141

July 1, 2019



Method of presentation:

Before we get started, I want you to think of the questions you want answered. If you are looking at this page before the presentation, write them down in the space below. At the beginning of this presentation I will ask for your questions. We will have volunteer stenographers writing each question down. If this is the first time you have seen this page, do not worry. We will go around the room and get as many of these questions recorded as possible.

I will then give my remarks, answering as many questions as possible during the presentation. At the end I will ask the stenographers if I have answered all the questions. All unanswered questions will be addressed.

Therefore, each of these presentations is different. No two are alike. They are geared toward not only your needs, but your questions.

Now write down your questions.

- 1.
- 2.
- 3.
- 4.

Ronney

July 1, 2019



The Financial Responsibilities of Being District Governor

Table of Contents

- I. The Financial Responsibilities of being a District Governor:
 - a. District Finances
 - b. Club Finances
- II. Rotary Funding for Governors
 - a. Regular
 - b. Alternative
- III. Documenting Expenses
- IV. Authorized Expenses
 - a. District Governor Nominee and District Governor Elect
 - b. District Governor
- V. District Governor Expenses
 - a. District Governor Expense Statement
 - b. District Governor Expense Statement Forms
 - c. Rotary Funding to DG vs District (Flow of Funds)
 - d. Worksheet example
- VI. Top Eight District Governor Expense Reporting Errors
- VII. Additional Reimbursements-International Assembly
- VIII. Risk Management

- IX. Insurance Provided by Rotary International
- X U.S. Rotary Club and District Liability Insurance Program
- XI. Compliance Issues
 - a. District and Rotary Clubs – Type of Organization
 - b. IRS Filing Requirements:
 - i. Who must file?
 - ii. So what form should be filed?
 - iii. What are gross receipts?
 - iv. Do Rotary Districts and Clubs have to pay taxes?
 - v. What are the penalties for not filing?
 - vi. Identification Numbers:
 - 1. Federal Identification Number
 - 2. Group Exemption Number
- XII. Incorporation

July 1, 2019



The Financial Responsibilities of Being District Governor

Section I – A – District Finances

As district governor, you have fiscal responsibilities such as managing the district's finances, monitoring the funds of clubs, practicing good stewardship, and ensuring that the district complies with all local laws, including applicable tax and nonprofit laws.

District Funds/Budget

Districts may establish a fund for financing district-sponsored projects and the administration and development of Rotary in the district. The district fund shall be established by resolution of the district conference. It is important to ensure that

- Decisions about the fund, including the district levy, are voted on at the district assembly, presidents-elect training seminar, or district conference
- The fund is not controlled by a single individual
- An annual statement and report of income and expenditures for the fund is presented to all clubs
- The district per capita levy finances the district fund. The annual budget should help set an appropriate levy amount. The per capita levy may be established or changed by at least three-fourths of the Incoming club presidents at PETS or the district training assembly, or by a majority of the electors present and voting at a district conference. Once established, the levy requires additional approval only if the amount needs to change.

The district finance committee will review and study the necessary costs of district administration. This committee should prepare a budget of district expenditures that should be submitted to clubs at least four weeks before your district training or presidents-elect training seminar and approved at a meeting of the incoming club presidents (at district training assembly, president-elect training seminar, or district conference).

Select one member of the district finance committee to act as treasurer and keep proper records of income and expenditures for each of your district's funds. You and the treasurer will supervise the funds, which should be held in a bank account in the district's name.

If your district raises funds for a specific purpose, such as a multi-district Rotary youth Exchange, a budget should be prepared and submitted to the governor and finance committee for approval, and subsequently to the club presidents. It is essential to maintain separate bank accounts for specific funds and to designate the chair of the appropriate committee as one of the signatories.

District budgets should include funds to support the governor and governor-elect (in addition to Rotary International's funding) as they prepare for and perform the responsibilities of office. Besides the official Rotary activities within the district, special club or district events may require your participation as governor. In accordance with RI policy, the expenses associated with these additional activities should be covered by the club or district. The district fund should also be used to defray the expenses of any visit to your district by the RI director for your zone or any other RI or Rotary Foundation officer invited to your district.

Reporting

After your year is over, work with the district finance committee to prepare an annual statement and report of district finances, which should mention all sources of district funds, including:

- All funds received by or on behalf of the district from fundraising activities
- Funds of the Rotary Foundation, including grants
- All district committees' financial transactions
- All the governor's financial transactions by or on behalf of the district
- All district fund expenditures
- All funds from RI to the governor

When the report is ready, have a qualified accountant or audit committee independently review it. After the review, the report should be discussed and formally approved at the next district meeting. If it is not adopted, then, it should be moved for discussion and adoption at the district conference. Make sure to provide 30 days' notice so all clubs can send a representative. If the annual statement has not been discussed and approved at the district conference, plan for its formal adoption at a separate meeting also to be announced with 30 days' notice, and to be held within three months of the district conference. If no such meeting takes place, a ballot-by-mail must be conducted within 60 days after the end of the district conference.

Also, you need to submit a copy of your district's annual statement and report of district finances to your Club and District Support representative, along with confirmation that it has been independently reviewed and shared with your district's clubs, within 12 months following your term. Otherwise, until the district financial statement is shared with your clubs and RI, and adopted by the clubs, you will not be eligible for:

- Any expense reimbursements from RI even if RI has validated your submitted expense report
- Any RI volunteer appointment or assignment
- Any Rotary Foundation appointment or assignment
- Any RI or Rotary Foundation award



The Financial Responsibilities of Being District Governor

Section I – B – Club Finances

Club Finances

Any per capita levy established by the district is mandatory for all clubs. Your service as governor and the services of RI can be withheld from any club that does not pay the district levy. In addition, per capita dues to Rotary International are mandatory for every club in your district. RI depends on you, as governor, to work with the clubs in your district to ensure they pay on time.

RI bills each Rotary club for per capita dues and required subscriptions to *The Rotarian* or a Rotary regional magazine (where applicable) twice per year. Council on Legislation charges and other fees are billed annually in July. All assessments are included in the same billing. The club dues invoice is created from the membership information your club has submitted to RI by 1 January or 1 July. Club presidents must ensure that their secretaries provide a current club member list to RI by 1 January and 1 July of each year. Once your club invoice is generated, adjustments to the balance can no longer be made.

Notifications of club termination for nonpayment will be sent to you and the RI director for your zone. You can download a copy of the Daily Club Balance report from rotary.org to monitor clubs' payment of RI dues and address problems before clubs are terminated. If you have difficulty accessing the report, contact your RI finance representative. You can locate your RI finance representative at rotary.org/cds.

As governor, you are asked to work with assistant governors and clubs to avoid termination and reinstate any terminated clubs. RI policy for termination and reinstating clubs is listed below.

Termination

* Clubs with unpaid dues of \$250 or more will be terminated 4 months after the 1 July and 1 January invoice dates. Code of Polices 9.020.1 (2).

Reinstatement

* Clubs can only seek reinstatement within 150 days after termination.

* To reinstate, a club must pay it's accrued balance in full, including a reinstatement fee of \$30 per member. Code of Policies 9.020.

* See Code of Polices 9.030 for actions clubs are not allowed to make while terminated.

Information obtained from the Rotary International
Lead Your District Governor
Club Invoice, Key Points for Club Presidents
And Rotary Code of Polices

July 1, 2019



The Financial Responsibilities of Being District Governor

Section II –A Rotary Funding for Governors – Regular (thru 6/30/21)

As governor, you will receive funding from Rotary International to assist you in fulfilling your official responsibilities in the district. In February of your year as governor-elect, you'll be advised of your allocated funding, which is determined by the RI Board of Directors. Your funding will take into consideration the needs of your district (# of Rotarians, # of clubs, # of club visits, estimated hotel overnights, training costs, office expenses, size of district, and # of languages) and then available Rotary funds. In first week of July, you will receive 70 percent of the allocated funding. These funds, given in your local currency whenever possible, are intended to subsidize the expenses you personally incur in carrying out your official duties as district governor, governor-elect, and governor-nominee including conducting your district team training events, presidents-elect training seminar, district assembly and district conference, visits to clubs, and office supplies. They are not intended to cover expenses incurred by the district, such as meeting and hotel rooms, meals, transportation expenses for attendees of district meetings, the publication of a district directory, and other district meetings and functions. The premise is that the funds will be used to further Rotary in the DG's district. This funding still does not cover expenses of spouses/significant others.

To receive any portion of the remaining 30 percent, you must first spend it on authorized expenses and provide documentation to RI no later than 31 July after your year-end.

For districts in the new governor funding process, the district finance committee will receive and distribute Rotary funds for the governor.

Information obtained from Rotary International
Lead Your District Governor
And April 2019 RI Board of Directors' Minutes

July 1, 2019



Section II B Rotary Funding for Governors – Alternative (To become mandated 2021)

- The district finance committee is responsible for
 - overseeing the funding,
 - creating an expense report for the DG to use,
 - determine the timing for DG's to submit their reports, and
 - approving the expenses the DG submits
- The participating districts receives 100% of the funding in July of the DG's year.
- By 31 July of the year following the DG's year (31 July 2020 for 2019-20 DG's) the finance committee is responsible for submitting a DG Funding Report (sample attached)
- The IPDG is still required to submit to the clubs an Annual Financial Statement, as required in Article 16 in the RI bylaws and ensure that it is discussed and approved by the clubs at a district meeting, also as noted in the bylaws. A copy must also be sent to Rotary International (through the district's CDS representative).

Regarding the last bullet point, please note that though the bylaws state this must be done by 30 September, the RI Board has extended the deadline. IPDG's have until 30 June of the year after the year the DG served (for 2019-20 DG's this would be 30 June 2021) to accomplish these requirements.

There is a course on the funding test entitled *District Governor Funding Test Resources* in the Learning Center on www.rotary.org/myrotary. The next few pages are excerpts from the course.

Information courtesy of memo from James Damato
& April 2019 RI BOD Minutes

APPENDIX: ALTERNATE DISTRICT GOVERNOR FUNDING PROCESS



This section is only for district finance chairs who have agreed to test a new district governor funding process. The requirements for participating districts are outlined below.

Receiving funds

- Learn the funding amount from RI in February.
- Have your committee submit a completed district payee form by 28 April to enable RI to send the district governor the funding payment each July. The district bank account must have at least two Rotarian signatories from the district finance committee.
- Receive 100 percent of the governor funding in the district account on 1 July.

Disbursing funds

- Distribute funds from the district account to the governor for eligible expenses, such as club visits, training events, office supplies, and other related expenses.
- Consider giving the district governor an advance for eligible expenses.
 - Establish a percentage based on total funds provided.
 - Review previous expense statements before disbursing additional funds.

Managing funds

- Determine how frequently governors must report expenses for reimbursement.
- Ask governors to provide expense documents as required by local laws.
- Report any substantiated misuse and mismanagement to your Club and District Support representative.
- Maintain appropriate recordkeeping systems to comply with local laws.
- Agree to return to the standard district governor funding process on 1 July 2020.

Reporting

- Submit the district governor funding report form to RI by 31 July following the governor's term. Include expenses incurred as a governor-nominee, governor-elect, and governor.
- Return any unused funds to RI by 30 September following the governor's term.
- Cooperate with any audits (financial, district governor funding, operational).
- Provide annual feedback about this process to Rotary International.

If you have any questions about the alternate governor funding process, contact your [Club and District Support representative](#).



DISTRICT GOVERNOR NEW FUNDING PROCESS

Participation Agreement

The 2017-18 district governor, 2018-19 district governor, 2019-2020 district governor (if named), and 2017-18 district finance committee chair agree to test a new process for District Governor Funding by adhering to the following requirements and signing this agreement by 15 August 2016:

- Appoint a district finance committee chair by 15 August 2016 and by 31 December of the following two years.
- Submit a completed Rotary payee form by 1 April 2017 to provide district account information enabling Rotary to send the DG funding payment each July. The account must have at least two Rotarian signatories from the district finance committee.
- Receive 100% of the DG funding in the district account and ensure unused funds are returned to Rotary no later than 90 days following the end of term (30 September).
- Distribute DG funding from the district account directly to governors for eligible expenses (club visits, district training, district conference, and office expenses).
- Agree to follow all policies in the DG Funding Agreement (available upon request).
- Collaborate on the annual statement and report of district finances and provide a copy to the clubs in accordance with Article 15.060.4 of the RI Bylaws. A financial statement template is available as needed.
- Submit the DG funding report form (enclosed).
- Agree to cooperate with audits (financial, district governor funding, or operational).
- Agree to investigate and resolve any misuse or mismanagement of DG funding, and report any substantiated misuse to Rotary’s General Secretary.
- Agree to return to operating in accordance with the standard DG funding process on 1 July 2020.

District Governor 2017-18

Signature/Date

District Governor 2018-19

Signature/Date

District Governor 2019-20 (if named)

Signature/Date

District Finance Chair 2017-18 (if named)

Signature/Date



DISTRICT PAYEE FORM

FUNDING PROCESS TEST (2017-20)

EN—(1216)

This form is only for districts that are participating in the district governor funding test. If your district is part of the test, complete this form by **28 April 2017** to provide Rotary with the information we'll need to send your district governor's funding to a district account.

The information you submit below will be used for all payments (except personal International Assembly reimbursements) in 2017-18, 2018-19, and 2019-20.

Before completing the form, refer to the [Payment Instructions by Country](#) (available on [Rotary.org](#)) to determine the payment method, currency, and the banking information that's required in your country. You may want to check with your bank to make sure you've included all the necessary information.

Note: Local regulations require district governors in Argentina, Brazil, Chile, and Colombia to provide a tax identification number.

Email this form to Rotary's Accounts Payable department at vendors@rotary.org, or fax it to +1-847-556-2137. If you complete the form by hand, print legibly in black or blue ink. If you have any questions, ask vendors@rotary.org or your Club and District Support representative.

* Indicates a field that is required for some or all countries.

SECTION A: DISTRICT CONTACT INFORMATION

* District Finance Committee Chair _____

* District Mailing Address _____

* City _____ * State or Province _____

* Postal Code _____ * Country _____

* Phone _____ * Email _____

* District Tax Identification Number _____
(required for Argentina, Brazil, Chile, and Colombia)

SECTION B: DISTRICT BANK ACCOUNT INFORMATION

Please note: Refer to [Payment Instructions by Country](#) to see the currencies available for your country and provide an account in the currency indicated for your country. The district must be the account holder, because the district is responsible for the use and documentation of these funds. The district may also be subject to local tax reporting requirements related to receiving these funds. We recommend checking with your tax advisers to ensure that you're in compliance.

* Account Holder Name (Beneficiary) _____

* Account Number _____ * Bank Account Currency _____

* Account Type (select one): ☐ Checking ☐ Savings ☐ Other (please specify) _____

* Bank Name _____ Phone _____

* Address, City, Postal Code, Country _____
(city and country required)

* Direct Deposit ABA Routing # _____
(required for all U.S. electronic funds transfers)

* SWIFT Code/BIC _____
(required for all international transfers)

* IBAN _____
(required for all payments to Europe)

* Other Required Bank Codes _____
(BSA, Sort, Branch, IFSC, CLABE, CBU, or Bank Clearing code; refer to [Payment Instructions by Country](#))

* U.S. Correspondent Bank Name _____
(required for international electronic funds transfers of U.S. dollars)

* U.S. Correspondent Bank ABA Routing # and/or SWIFT Code/BIC _____
(required for international electronic funds transfers of U.S. dollars)

* District Finance Chair Signature _____ Date _____
(not required if submitted by email)

START GUIDE FOR DISTRICT GOVERNOR FUNDING TEST DISTRICTS

Use the questions in this worksheet to help you determine how your district will handle Rotary funding for district governors, including procedures for receiving the funds from Rotary, providing funds to the district governor, verifying proper usage of the funds, and reporting to Rotary.

1. What bank account will receive the DG funding payment from Rotary International?
This account must be a District controlled account.

2. How many signatories will you have on the district bank account receiving the funds from Rotary International and what are their positions? A best practice is to have at least two signatories (who should not be the DG, unless at least two signatures are required to withdraw funds from the account).

3. How will the Rotary funds be distributed to the district governor?* When determining this, please consider local laws, tax codes and local financial best practices, as there may be local tax or other implications based on how the funds are distributed.
Options include but are not limited to:
 - a. Reimbursement only upon receipt of valid expense report
 - b. 70% advance on [Date] and up to 30% additional reimbursement upon receipt of valid expense report (same as current Rotary process)
 - c. ___% advance on [Date] and up to ___% additional reimbursement upon receipt of valid expense report (choose different percentages)

4. What form will be used by the governor to document/validate expenses?
 - a. District will create own form
 - b. District will use template form from Rotary

(It is recommended the form track expenses according to club visits, training, and office supplies so the DG Funding Report can be completed with ease.)

District Governor Funding Report	
District	
District Governor Name	
Year Served	
Funding from Rotary	
Please list all Rotary funds distributed to this district governor by the district finance committee for expense incurred as a DGN, DGE, and DG.	
Total DG Funding Received from Rotary	0.00
Category	Total Expenses
Club Visits	0.00
District Training Meetings	0.00
District Conference	0.00
Office Supplies	0.00
Total Rotary Funds Distributed to DG	0.00
Funds to Return to Rotary	0.00
Funding from District	
Please list all non-Rotary funds distributed to this district governor as a DGN, DGE, and DG.	
Category	Total Expenses
District Governor-Nominee	0.00
District Governor-Elect	0.00
District Governor	0.00
Total non-Rotary Funds Distributed to DG	0.00
Total Rotary and Non-Rotary Funds Distributed to DG	0.00

Annual Statement and Report of District Finances		
District		
Rotary Year		
DG Name		
ID	List All District Revenue	Total
1	District per capita levy on clubs	0.00
2	Youth programs	0.00
3	Events	0.00
4	Fundraising	0.00
5	Governor funding from Rotary	0.00
6	TRF grant or other TRF funds designated for district use	0.00
7	Bank account interest	0.00
8	Other income	0.00
9	Total District Revenue	0.00
ID	List all District Expenses	Total
10	Rotary clubs	0.00
11	Youth programs	0.00
12	Events	0.00
13	Fundraising	0.00
14	District office and administration	0.00
15	District projects	0.00
16	Rotary-funded grant projects	0.00
17	Governor expenses	
17a	Club visits	0.00
17b	District training meetings	0.00
17c	District conference	0.00
17d	Office supplies	0.00
17e	Other governor expenses	0.00
17f	Governor expenses subtotal	0.00
18	Incoming governors	0.00
19	Assistant governors	0.00
20	District committees	0.00
21	Other expenses	0.00
22	Total District Expenses	0.00
23	Starting balance (from 30 June of the previous year)	0.00
24	Ending Balance	0.00

Additional Information

Reporting Requirements

At its January 2017 meeting, the RI Board approved more detail related to non-compliance with the bylaws provision for furnishing an annual statement to clubs and RI. This applies to all districts, whether participating in the alternate funding test or not. If a IPDG fails to comply with this requirement, they will be ineligible to receive:

- any additional expense reimbursements from RI**
- any RI volunteer appointment or assignment**
- any Rotary Foundation appointment or assignment**
- any RI or Rotary Foundation award**

Information courtesy of memo from James Damato



The Financial Responsibilities of Being District Governor

Section III – Documenting Expenses

Documenting Expenses

You will be reimbursed only for expenses you document and submit to RI and only up to the amount of your original funding. If it appears that you will need additional funds because of unusual circumstances, you must obtain prior approval from the RI general secretary. You are responsible for checking local tax regulations related to expense reporting to ensure that you are complying with your country's laws. The only form to complete is the new District Governor Expense Statement.

To be reimbursed for your expenses, you must include original, or legible copies of receipts for all individual expenses that total US\$75 or more (contact your Club and District Support representative for additional local requirements). Consider the following exceptions and suggestions when documenting your expenses:

- For all hotel and lodging expenses, a zero-balance hotel folio receipt is required, regardless of the amount.
- For all air travel, a receipted invoice must be provided.
- If a rental car is used, a copy of the rental agreement and a receipt for the amount paid must be provided. When renting a car, use either mileage or the cost of the rental, not both and not fuel.
- RI asks that the receipts be put in the same order as on the report. And if you want to use some coding system, all the better.
- You are encouraged to submit electronically via e-mail, by scanning the receipts in the order of the report. Be sure scanned copies are legible. (maybe required now)
- Maintain a detailed record of your expenses, even those for which receipts may not be available (for instance, taxi fares or tips). Detailed records will simplify computing your expense report and ensure you are prepared in case you are audited.
- At the minimum, all governors are required to submit an expense report detailing their use of the 70 percent advance from RI. If you wish to claim any portion of

the final 30 percent of your funding, you must also submit documentation. Any undocumented portion of the advance will be considered monies due to RI and must be returned. If amounts exceeding \$100 are owed to RI and are not returned within 90 days, you will be ineligible for any further Rotary or Rotary Foundation appointments.

- U.S. governors only: To comply with Internal Revenue Service regulations, district governors in the United States, its territories, and its possessions must document the use of the funds advanced to them personally by RI and return any unused funds. Failure to do so will require RI to issue a Form 1099 MISC, which reports the funds as income to the IRS.

Information obtained from the Rotary International
Lead Your District Governor
And memos from James Demato, RI Club & District Support

July 1, 2019



The Financial Responsibilities of Being District Governor

Section IV – A – Authorized Expenses – District Governor Nominee and District Governor Elect

Rotary Funding for Governors now covers eligible expenses from the time an individual is selected as DG, to the last day of their DG year. Separate expense reports are no longer used for Governors-elect Training Seminar, Assistant Governor Training, and costs associated with organizing new clubs.

The types of expenses available for reimbursement are the same as for District Governors. However, please note there is no substantial increase in funding, just more flexibility. And travel to the RI convention and purchase of any type of equipment, such as desktop computers, laptops, iPad's, cell phones, etc. are still not reimbursable. Please ask your Club and District Support Representative (www.rotary.org/cds) any questions concerning reimbursable expenses.

Information obtained from Rotary International
Lead Your District Governor
And Memo from James Demato, RI Club & District Support

July 1, 2019



The Financial Responsibilities of Being District Governor

Section IV – B – Authorized Expenses – District Governor

The Governor Expense Guide has been eliminated, and funding is now at the discretion of the DGN, DGE, and DG, keeping in mind there will not be a substantial increase in their funding and that the funding should be used to further Rotary in their district.

Expenses considered basic governor responsibilities:

Club Visits

1. Travel
2. Hotel
3. Meals

Training & Other Meetings

1. Travel, hotel, and meals for meeting attendance and site visits (GETS, AG Training, PETS, district assembly, district conference, and district team training).
2. Funding can be used to reimburse expenses from district training team members (including assistant governors).

Office Expenses

1. Supplies, printing, copying
2. Phone and internet
3. Publications and mailings

Other

1. Theme pins
2. Banners,
3. Gifts,
4. Theme jackets

Expenses specifically excluded include travel to RI convention and purchase of any type of equipment, such as desktop computers, laptops, iPad's, cell phones, etc.

Information obtained from Rotary International
Lead Your District governor
And Memo from James Demato, RI Club & District Support

July 1, 2019



The Financial Responsibilities of Being District Governor

Section V – A – District Governor Expense Statement

Although there is now just one form, as compared to 7 in prior years, you may still desire to complete the forms by type of expenditure. You could also choose to keep expenditures in date or event date order. A copy of the new District Governor Expense Statement follows.

How to Prepare Your Expense Report

Please follow these steps to prepare your expense statement.

1. Be sure to type or print legibly
2. If you include an expenditure over \$75, make sure you have appropriate documentation to attach
3. If you include a hotel expense make sure you have appropriate documentation
4. Remember when renting a car, use either mileage or the cost of the rental, not both and not fuel.
5. Record every expense separately. Do not group.
6. Total the expenses and record at the bottom. If you've used additional pages, record the total on the last page only.
7. Complete the entire form, sign, and date.
8. Keep a copy of the completed pages and accompanying receipts for your records.
9. Mail or e-mail the signed Summary Report, completed report forms, and required receipts to your Club and District Support representative at the RI office serving your district. (May now require e-mail only)

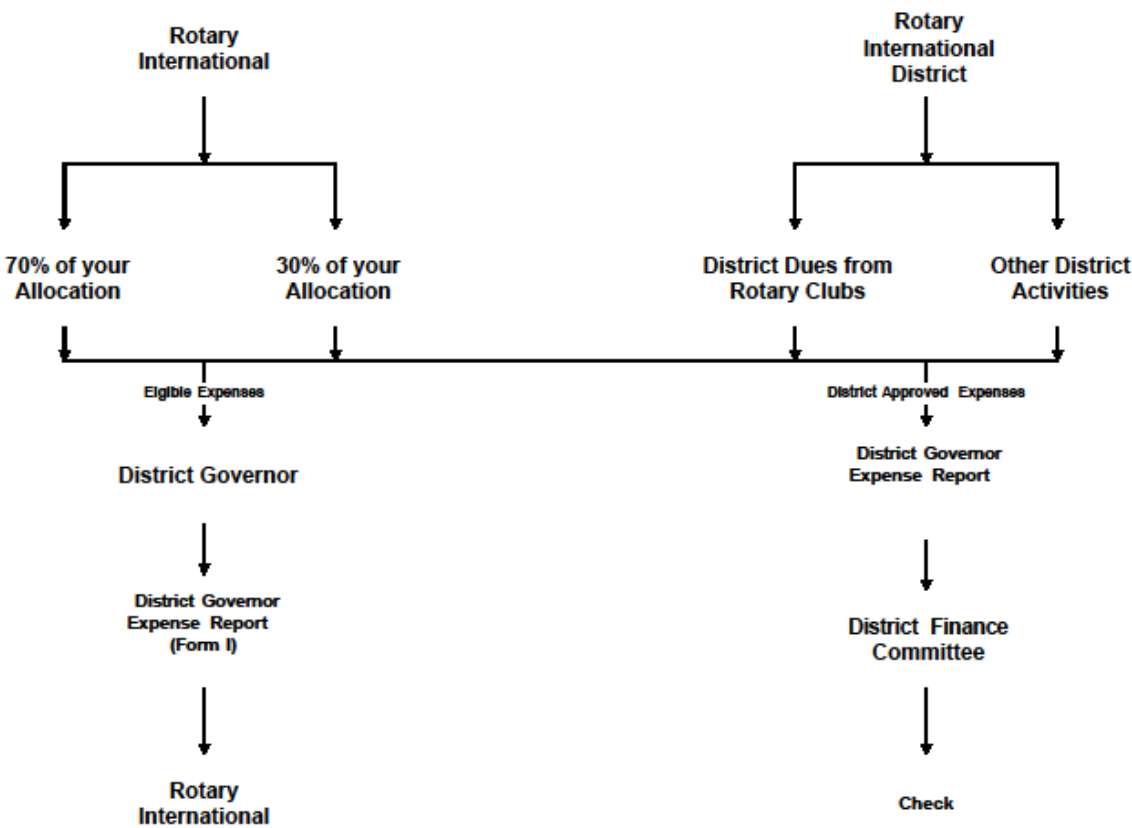
You may incur expenses that are not reimbursable but may be paid from other sources, such as your district fund, or even your own club. If you need help or have any questions, please contact your Club and District Support representative.

AUTO TRAVEL LOG

[illegible]

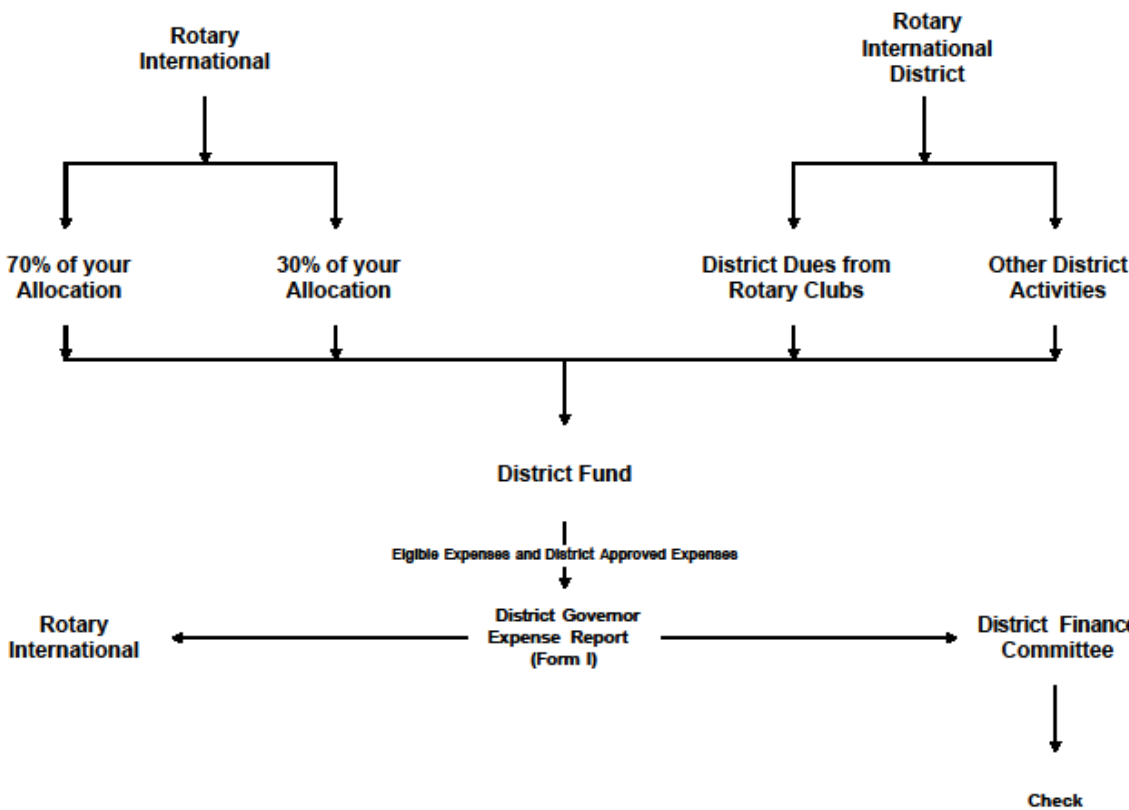
Rotary International District Governor Expense Report

Possible Flow of Funds - Example 1



Rotary International District Governor Expense Report

Possible Flow of Funds - Example 2



Mileage Schedule									
Month: July									
		# of							
Date	Purpose/descriptpn	miles	rate	total	Rotary Int	District	Club	Personal	Explanations
1	Visits-RC of Killeen	140	0.545	76.30	76.30				use up RI allocation, then District, then club
2	Training-RC of Waco	200	0.545	109.00	109.00				
2	Visit- RC of Hillsboro	78	0.545	42.51	42.51				
3	Fd training-Austin	55	0.545	29.98		29.98			Foundation exp not reimb by RI
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
			0.545	-					
	Totals			257.79	227.81	29.98			



The Financial Responsibilities of Being District Governor

Section VI – Top Eight District Governor Expense Reporting Errors

Below are the most common errors made in reporting district governor's expenses.

1. Insufficient detail provided on each line item (especially for printing and postage expenses). Make sure to include specifics of the official RI business purpose of each expense;
2. Receipt not included for expenses US\$75.00 or more, and all hotel expenses. Hotel expenses must be accompanied with a hotel bill (folio);
3. A credit card statement does not suffice as receipt;
4. Expenses claimed for spouse or district officer, or at district committee meetings, etc.;
5. Expenses related to RI Foundation activities;
6. Expenses incurred by the district instead of expenses personally incurred by the governor. The governor's allocation is intended to reimburse governors for personal expenses incurred while performing official RI duties;
7. Incorrect mileage rate for automobile travel expenses. Current mileage rates are listed in the "Travel services" of the "General information" area in the Members section of www.rotary.org;
8. A "per day" amount for meals (e.g. 5 meals at \$20.00/day). Each individual expense must be listed out separately.



The Financial Responsibilities of Being District Governor

Section VII - Additional Reimbursements-

International Assembly

RI provides the air transportation, hotel accommodations, and meals for you and your spouse for the International Assembly. Information on making arrangements and additional allowable expenses are included in the registration mailing you'll receive from RI in August or September. To be reimbursed for any additional authorized costs you incur attending the assembly, submit the Rotary International and Rotary Foundation Expense Statement within 60 days after the International Assembly.

If your spouse/partner decides to skip the assigned meetings, RI will charge you the costs of bringing him/her to International Assembly. I.e. If RI pays, you and your spouse/partner **will** attend.

Information obtained from the Rotary International
District Governor's Manual Publication

July 1, 2019



The Financial Responsibilities of Being District Governor

Section VIII – Risk Management

Risk management is the process of planning, organizing, leading, and controlling an organization's activities to minimize the adverse effects of accidental losses on the organization. You are able to minimize risk and safeguard Rotarians, program participants, and assets belonging to the district. Limit your personal liability and that of your district by answering three basic questions when planning activities and events for your year as governor:

- What can go wrong?
- If something goes wrong, how will I or the district respond?
- How will any losses be paid for?

If there's a significant possibility that something can go wrong, you can reduce risk by

- Not conducting the activity or event
- Modifying the activity or event to lessen the risk
- Preparing a plan to address any potential problems
- Finding another organization that will agree to participate and share the risk

Though conducting business through handshakes or verbal agreements may be common, RI strongly recommends that your district use written and signed contracts. A contract attempts to clearly define the roles and responsibilities of each party and can include provisions to limit risk. When negotiating a contract, read it thoroughly to understand what you are agreeing to. Retain legal documents for several years after the event in case a claim is made.

Districts and clubs are urged to obtain the advice of legal and insurance counsel regarding liability protection. Protection may come through the incorporation of the district or club (or its activities) or the purchase of liability insurance coverage as deemed appropriate. See the *Manual of Procedure* (035) for additional information

Information obtained from Rotary International
Lead Your District Governor

July 1, 2019



The Financial Responsibilities of Being District Governor

Section IX – Insurance Provided by Rotary International

Insurance Coverage Provided by Rotary

While you are acting in your role as a Rotary officer during your term as district governor (1 July to 30 June), you will be covered by the RI general liability and directors and officer's liability insurance policies.

You are covered under these policies only while you are acting in your role as a Rotary officer. Because you will not be serving in this role at all times during your year in office, your district is urged to secure general liability and directors and officers liability insurance to ensure complete coverage. The cost of obtaining additional coverage is not reimbursable as part of your district governor's allocation from RI. To obtain insurance appropriate for your geographic area, contact a local insurance agent. If you are aware of an insurance claim or an incident that may give rise to a claim while you are serving as governor, contact your CDS representative immediately.

Coverage for U.S. Districts

Districts in the United States and its territories and possessions are automatically covered by general liability and directors and officers employment practices liability insurance through a program arranged by RI and paid for by all active U.S. clubs through the semiannual dues report.

Coverage at the International Assembly

You and your spouse will be covered by travel insurance while traveling to and from the International Assembly and attending the meeting. This coverage, which is intended for use in the event of an illness or injury, varies depending on your home country. For example, if you live in the United States, travel medical insurance coverage will not be provided. Your International Assembly registration packet will include more detailed information about the insurance coverage provided by RI.

Information obtained from Rotary International
Lead Your District Governor

July 1, 2019



The Financial Responsibilities of Being District Governor

Section X – U.S. Rotary Club and District Liability Insurance Program

Active U.S. Rotary clubs and districts are provided with general liability ("GL") and directors & officers/employment practices liability ("D&O/EPL") insurance through the U.S. Rotary Club and District Liability Insurance Program ("Program"). The Program is financed by insurance assessments collected from U.S. Rotarians.

Note: The Program does NOT provide coverage for bodily injury or property damage sustained by a first-party insured, such as a Rotarian or volunteer.

To obtain a certificate of insurance, insurance policies and summaries, and loss control guidelines, please visit the Insurance Information Portal.

Note: Insurance information Portal is a protected website and can be accessed with a user name and password only. User name and password have been provided to club and district officers through the annual mailing. You can also contact Lockton to obtain a user name and password at rotary@lockton.com.

Insurance Information Portal's web address
<https://www.locktonportal.com/sites/rotary/resources>

To report an incident, please contact [Rotary International Risk Management](#).

Information obtained from the Rotary International Web Site
<https://www.rotary.org/en/members/generalinformation/insurance/pages/ridefault.aspx>

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Section XI – A – District and Rotary Clubs – Type of Organization

On 13 May 1958, the Internal Revenue Service declared that Rotary International (RI) and its clubs and districts are entitled to exemption from federal income tax under Section 501(c)(4) of the Internal Revenue Code.

Tax Deductible Status:

Contributions to clubs and districts are generally not tax deductible as charitable contributions. Clubs and districts that have gross annual receipts that normally exceed \$100,000 generally must include a disclosure statement regarding the non-deductibility of contributions during fundraising solicitations (IRC Sec. 6113). Note that this includes invoices *for payment of dues*. See **IRS Notice 88-120** for more details and acceptable disclosure language. Sometimes clubs create a separate charitable organization or fund and obtain tax exemption under Section 501(c)(3) of the Internal Revenue Code. Contributions to such exempt fund may be tax deductible as charitable contributions. Membership dues may be deductible for some Rotarians as business expenses.

Information obtained from Rotary International and the Internal Revenue Service
– Code, Regulations, and Instructions

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Section XI – B – I – Filing Requirements – Who Must File?

While Rotary clubs and districts are exempt from paying *federal income tax on exempt function activities*, **the law does require Rotary clubs and districts to file an annual information return (Form 990, 990-EZ) or submit an annual electronic notice (Form 990-N). The version a club files is dependent upon its gross receipts for the year.**

If the Rotary Club or district engages in activities that are regularly carried on, not a part of their exempt function, and the gross receipts exceed \$1,000, they are required to file a Form 990T, and could be subject to paying income tax. Examples of activities would be advertising or marketing for a for-profit business.

These returns are required annually. The law mandates that this information be submitted on or before the 15th day of the 5th month following the close of the annual accounting period **(no later than 15 November)**. Failure to meet the annual filing requirement for three consecutive years will result in **revocation of the tax-exempt status of the club or district** in question. To learn more about this requirement, visit the US Treasury website at: www.irs.gov/eo, or call the toll-free number: (877) 829-5500.

Information obtained from the Internal Revenue Service –
Code, Regulations & Instructions

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Section XI – B – II – So what form should be filed?

Form 990-N. If an organization normally has gross receipts of \$50,000 or less, it must submit Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required To File Form 990 or 990-EZ, if it chooses not to file Form 990 or Form 990-EZ (there are exceptions for certain section 509(a)(3) **supporting organizations** and for certain organizations described in *Part B, of IRS instructions*).

Form 990-EZ. If an organization has **gross receipts** less than \$200,000 and **total assets** at the end of the tax year less than \$500,000, it can choose to file Form 990-EZ, Short Form Return of Organization Exempt From Income Tax, instead of Form 990. See the instructions for Form 990-EZ for more information. There are special rules for **controlling organizations** under section 512(b)(13) and **sponsoring organizations of donor advised funds**.

If an organization eligible to submit the Form 990-N or file the Form 990-EZ chooses to file the Form 990, it must file a complete return.

Information obtained from the Internal Revenue Service Instructions for Form 990
Return of Organization Exempt From Income Tax

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Section XI – B – III – What are Gross Receipts?

Gross receipts are the total amounts the organization received from all sources during its annual tax year (including short years) without subtracting any costs or expenses.

Information obtained from the Internal Revenue Service Instructions for Form 990
Return of Organization Exempt From Income Tax

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Section XI – B – IV – Do Rotary Districts and Clubs have to pay taxes?

Other Taxes:

Clubs or districts may be required to file **IRS Form 990-T** if they have "*unrelated business income*." An unrelated trade or business is defined as any trade or business that is regularly carried on, and that is not substantially related to the organization's exempt purpose or function. (IRC Sec. 513). Federal Social Security and withholding taxes, and local state income taxes may be required from a club or district that has one or more paid employees. Please contact the IRS or your tax consultant or attorney for guidance on this issue.

The laws of individual states vary regarding state income tax, sales tax, other taxes and special licenses. The 501(c)(4) status applies only to federal income tax and does not necessarily have any bearing on state or local taxes. IRS interpretation of its Code also can vary slightly in different US Treasury districts.

Information obtained from the Rotary International and the Internal Revenue Service – A Bulletin for Rotary Clubs and Districts in the USA, Puerto Rico, US Virgin Islands, Guam, American Samoa, and Northern Mariana Islands

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Section XI – B – V – What are the penalties for not filing?

Against the organization

Under section 6652(c)(1)(A), a penalty of \$20 a day, not to exceed the lesser of \$10,000 or 5% of the **gross receipts** of the organization for the year, can be charged when a return is filed late, unless the organization shows that the late filing was due to reasonable cause. Organizations with annual **gross receipts** exceeding \$1 million are subject to a penalty of \$100 for each day failure continues (with a maximum penalty for any one return of \$50,000). The penalty applies on each day after the due date that the return is not filed.

Tax-exempt organizations that are required to file electronically but do not are deemed to have failed to file the return. This is true even if a paper return is submitted, unless the organization files by paper to report a name change.

The penalty can also be charged if the organization files an incomplete return, such as by failing to complete a required line item or a required part of a schedule. To avoid penalties and having to supply missing information later:

- Complete all applicable line items,
- Unless instructed to skip a line, answer each question on the return,
- Make an entry (including a zero when appropriate) on all lines requiring an amount or other information to be reported, and
- Provide required explanations as instructed.

Also, this penalty can be imposed if the organization's return contains incorrect information. For example, an organization that reports contributions net of related fundraising expenses can be subject to this penalty.

Use of a paid preparer does not relieve the organization of its responsibility to file a complete return.

Against responsible person(s).

If the organization does not file a complete return or does not furnish correct information, the IRS will send the organization a letter that includes a fixed time to fulfill these requirements. After that period expires, the person failing to comply will be charged a penalty of \$10 a day. The maximum penalty on all persons for failures for any one return shall not exceed \$5,000.

There are also penalties (fines and imprisonment) for willfully not filing returns and for filing fraudulent returns and statements with the IRS (see sections 7203, 7206, and 7207). States can impose additional penalties for failure to meet their separate filing requirements.

Automatic revocation for non-filing for three consecutive years

The law requires most tax-exempt organizations, other than churches, to file an annual Form 990, 990-EZ, or 990-PF with the IRS, or to submit a Form 990-N e-Postcard to the IRS. If an organization fails to file an annual return or submit a notice as required for 3 consecutive years, it will automatically lose its tax-exempt status. Organizations that lose their tax-exempt status may need to file income tax returns and pay income tax but may also apply for reinstatement of exemption. For details, go to www.irs.gov/eo



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Section XI – B – VI – 1 – Federal Identification Number

This 9-digit number is essentially a tax ID number and has nothing to do with whether the club or district has any employees. As RI must report annually the EINs of all districts and clubs in the USA, Puerto Rico and Virgin Islands, the RI secretariat maintains a list of those EIN tax numbers for reference. New Rotary Clubs, however, must apply directly to the IRS for an EIN number to be assigned to the new Rotary club. Please contact your Club and District Support (CDS) representative at Rotary International headquarters if you have any questions about the EIN number for your club or district.

Information obtained from the Rotary International and the Internal Revenue Service – A Bulletin for Rotary Clubs and Districts in the USA, Puerto Rico, US Virgin Islands, Guam, American Samoa, and Northern Mariana Islands

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Section XI – B – VI – 2 – Group Exemption Number

RI's **Group Exemption Number** (referred to as "GEN" on Form 990), is **0573**, which applies to RI as well as all USA, Puerto Rico and Virgin Islands clubs and districts. At the same time, every club and district in the USA, Puerto Rico and Virgin Islands is required to have its own ***Employer Identification Number (EIN)***.

If the club or district fails to file their tax return for 3 years and loses their exemption from IRS, they will also lose the ability to use RI's Group Exemption Number. They will also have to make application (Form 1024) to the Internal Revenue Service to be an exempt organization. The Form 1024 is long and detailed, and the review process by IRS can take six months or more.

Information obtained from the Rotary International and the Internal Revenue Service – A Bulletin for Rotary Clubs and Districts in the USA, Puerto Rico, US Virgin Islands, Guam, American Samoa, and Northern Mariana Islands

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Section XII – District Incorporation

1. When a group or organization incorporates, it forms into a legal corporation. The primary benefit of incorporating is to protect personal assets from potential business liabilities. Incorporation may also support continuity and consensus for decision-making, because the district board of directors will be involved in short- and long-term decisions that affect the district.

Districts may seek the RI Board's approval to incorporate if they have the support of at least two-thirds of their clubs. RI requirements for district incorporation include:

- All clubs must be members of the incorporated district.
- The district governor must be the highest officer of the district corporation.
- The district's corporate documents must be consistent with the RI Constitution, RI Bylaws, and policies to the extent permitted by the laws of the local jurisdiction.

If you are considering incorporating your district, contact your CDS representative. Find more information about incorporation at rotary.org.

Information obtained from Rotary International
Lead Your District Governor
And Manual of Procedures

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WRAP UP