



# IMAGINE ROTARY



Rotary



**2022-23**  
**REGIONAL ROTARY CHALLENGE**

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**ZONES 25B & 29**

## DEAR DISTRICT GOVERNORS AND ROTARY LEADERS OF ZONES 25B AND 29,

*We know how exciting the beginning of a Rotary year is as you anticipate and plan on how you and your team will meet your Rotary Goals. Every District Governor and their teams are committed to achieving their goals but sometimes are not sure of what strategies will work best to achieve those goals.*

*The Rotary Zones 25B and 29 Coordinators have gathered some of the best practices that lead to successful achievement of the goals in Membership, Foundation, Public Image, Polio, and Endowment/Major Gifts.*

*In order to encourage your participation, the Zone Leaders have created Challenge Awards for each area that demonstrates adoption of the interventions. To support additional innovative strategies, you can also share your best practices in the Challenge Award.*

*Your Zone Coordinators and their assistants will be working with you and your teams throughout the year on how you can best take advantage of the Challenge Award strategies to achieve your goals.*

*We wish you the best as we all Imagine Rotary and work together to achieve goals that we know will be beneficial to all!*

**Pat Merryweather-Arges**  
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### VISION:

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

### GOALS FOR PRIORITY 1 – INCREASE OUR IMPACT

- Eradicate polio and highlight Rotary's role
- Increase contributions to the Annual Fund and PolioPlus while building the Endowment Fund to \$2.025 billion by 2025
- Develop new partnerships and showcase effective club, district, and international programs and projects particularly in Rotary's seven Areas of Focus

### GOALS FOR PRIORITY 2 – EXPAND OUR REACH

- Elevate Rotary's global profile as people of influence, people of purpose, and people of action
- Start and nurture new, innovative clubs and participant engagement channels

### GOALS FOR PRIORITY 3 – ENHANCE PARTICIPANT ENGAGEMENT

- Enhance member engagement tools that support Rotary's core values through personal growth, leadership development, service, and networking opportunities
- Increase collaboration between all participants particularly Rotary, Rotaract, and Interact clubs

### GOALS FOR PRIORITY 4 – INCREASE OUR ABILITY TO ADAPT

- Support and encourage the use of virtual connectivity to optimize in-person meetings, training, fundraising, and service projects
- Further a commitment to Diversity, Equity and Inclusion at every level of leadership within the family of Rotary
- Review our service delivery and volunteer leadership structure to improve effectiveness, responsibility, and accountability

# General Program **OVERVIEW AND RULES**

## **GOAL:**

To provide actionable and measurable objectives for districts to meet in several areas, allowing the districts to focus on activities and benchmarks that will lead to increased and continued success.

## **RECOGNITION:**

In each of the four areas (Membership, Polio Plus, Public Image and The Rotary Foundation), districts will submit a summary of the activities they completed and benchmarks they achieved. If a district completes at least three of the activities/benchmarks in each category, they will be recognized with the “Regional Citation” in that area. Additionally, if a district completes the required criteria in each of the four areas, they will be recognized as an “All Star District”.

## **COMPETITION:**

Along with the Citation, the district in each zone that completes the most activities/benchmarks in an area will be recognized as the “District of the Year” in that area.

## **DISTRICT OF THE YEAR:**

Further, the standings in each area will be combined to determine an overall “District of the Year” in each zone, recognizing that district for outstanding performance towards meeting objectives and benchmarks across all areas.

## **SUPPORT:**

Regional Leadership, including Regional Coordinators and their teams, will assist districts in several ways:

- Design Zone Institute track training that centers around the activities in the Challenge, which will lead to increased productivity and success in the districts
- Provide ongoing data to districts so they can track their progress towards benchmarks during the Rotary year
- Provide ongoing training opportunities throughout the year to assist districts in developing plans geared towards completing activities
- Work with districts on an individual basis to assist as needed, and to provide proactive communication that will help identify any needs

## **OVERALL BENEFITS:**

The benefits of this District Challenge include:

- Providing a road map to districts to help determine what to focus on in their planning activities (eliminating the practice of reinventing the wheel each year)
- Help create good habits in districts that can be built upon to create sustainable success
- Build teamwork within districts so more can be accomplished when people work together
- Encourages sharing of ideas between districts
- Allow for recognition for a job well done, which builds additional momentum for the future
- Provides a historical record of what was accomplished each year
- Creates friendly competition that will result in all districts doing more (and benefiting everyone)
- It’s fun!

## **GENERAL RULES**

- Districts will have the full 2022-23 Rotary year to complete the activities
- All submissions should be received no later than August 1st, 2023, and should be completed using the defined submission process (combination of checklist & narrative)
- Submission process will be communicated to district leadership far in advance of August 1, 2023
- Final determination on whether a submission in any area qualifies for credit will be made by the Regional Leadership Team
- All recognition will be provided at the 2023 Zone Institute

**FOR MORE INFORMATION, GO TO [www.zones25b-29.org](http://www.zones25b-29.org)**



*Membership is the lifeblood of Rotary. The more members we have, especially engaged members, the more impact we can have on the world around us. Attracting new members, engaging and retaining current members, and starting new clubs are all important in representing and serving the diverse communities we reside in. By implementing and achieving activities related to membership, your clubs will be strong, healthy and vibrant!*

#### CATEGORY 1: TEAM MAKE-UP

1. Have a District Membership Team made up of at least five members, with subcommittees including attraction, engagement, and leads, and at least one of which that is a Rotaractor, identified by September 1st that meets at least four times during the year (List members and dates of meetings)
2. Establish Membership Team goals that are clear and measurable by September 1st (Send a copy to the Zone Coordinator (Membership) by September 1 and include in submission)
3. Promote the Membership Team, resources, and activities on the district website (Describe in narrative)
4. Develop and implement a strategy to take action on Rotary's Leads Program (Include with submission)
5. Develop a succession plan for Membership Team members to ensure continuity (Describe in narrative)
6. Other significant and innovative team make-up related initiatives (Describe in narrative)

#### CATEGORY 2: TRAINING/COMMUNICATION

1. At least 90% of Rotary and Rotaract clubs have a Membership team leader identified in My Rotary
2. Conduct at least two District Membership Training Seminars/Workshops with different purposes (Please attach agenda and provide dates/locations)
3. At least 50% of Rotary and Rotaract clubs have a member complete a Membership related course on Rotary's Learning Center
4. The Membership team leader, or another significant Team Member (not a Zone officer) attends the Membership training session at the 2022 Zone Institute in Minneapolis, Sept 14-18 or the 2022 Multidistrict Training Institute in Pflugerville, Tx, August 5-6 (Include name/position)
5. Provide at least bi-monthly (six times during the year) progress updates so club leadership know where they stand in relation to their membership goals (Include dates and examples of communications)
6. Other significant and innovative training/communication related initiatives (Describe in narrative)

#### CATEGORY 3: MEMBER ENGAGEMENT

1. Increase district member retention rate, as compared to 2021-22 (Include 2021-22 and 2022-23 retention rates)
2. Work with at least 25% of your Rotary and Rotaract clubs to implement membership assessments to help clubs determine the needs of their members (Include the clubs worked with, along with details of the assessments)
3. Conduct a survey of Rotary and Rotaract clubs to determine the number of hands-on service projects they implement and encourage clubs to implement additional projects, so the district-wide average is at least 4 hands-on service projects per club (Include list of clubs with number of service projects conducted)
4. Design and distribute to Rotary and Rotaract clubs a template mentorship program for new members that focuses on engaging them throughout their first year of membership (Submit a copy of program documents)
5. Create and implement an activity that will have a direct impact on members, which meets the guidelines to be eligible for the Zone \$500 reimbursement (Include details in narrative)
6. Other significant and innovative membership engagement related initiatives (Describe in narrative)



**CATEGORY 4: MEMBER ATTRACTION**

1. Develop a specific plan with actionable steps to increase Rotary and Rotaract membership in district (include a copy of the plan)
2. From July 1, 2022, to June 30, 2023, have a net gain in overall membership (Include July 1, 2022, and June 30, 2023, membership counts).
3. Work with clubs so that at least 25% of Rotary and Rotaract club presidents sponsor a new member into their club, or another club (Include list of clubs/presidents/new member)
4. Design and distribute to Rotary and Rotaract clubs a new member orientation program that can be implemented for all new members (Submit a copy of program documents)
5. Welcome all new members to the district with communication from the District Membership Team (Provide copy of communication and list of recipients)
6. Other significant and innovative member attraction related initiatives (Describe in narrative)

**CATEGORY 5: NEW CLUB DEVELOPMENT**

1. Identify and appoint a “New Club Development Chair” that serves on District Membership Team by September 1st
2. Hold at least one training session on innovative club formats and Rotaract clubs (Provide date/location/agenda)
3. Work with district leaders (and innovative club advocates) to analyze membership and community demographic data to identify locations that can support new Rotary and Rotaract clubs (Describe activities in narrative)
4. Create a sustainable support plan for new Rotary and Rotaract clubs to help them thrive over the long term (Provide copy of plan)
5. Start and nurture at least two new Rotary or Rotaract Clubs in your district
6. Describe your district’s innovative club initiative, or other activities, in the narrative

**CATEGORY 6: DIVERSITY, EQUITY, AND INCLUSION**

1. Develop a specific plan with actionable steps to promote importance of diversity, equity, and inclusion in our Rotary and Rotaract clubs (include a copy of the plan)
2. From July 1, 2022, to June 30, 2023, have an increase in female membership percentage (Include July 1, 2022, and June 30, 2023, female membership percentages)
3. From July 1, 2022, to June 30, 2023, have an increase in under 40-year-old membership percentage (Include July 1, 2022, and June 30, 2023, under 40-year-old membership percentages)
4. In support of Rotary’s commitment to diversity, equity, and inclusion, work with other district leaders to organize and conduct at least three inclusive virtual or in-person events that engage a diverse cross-section of members (Include details/explanation of these three events)
5. Encourage clubs to make leadership roles more accessible and to invite more members into those roles (Provide examples of your actions in narrative)
6. Other significant and innovative DEI related initiatives (Describe in narrative)



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## ROTARY MEMBERSHIP CHALLENGE

Activities for July 1, 2022 – June 30, 2023

### CATEGORY 7: OTHER

1. At least 95% of Rotary and Rotaract clubs in your district set Membership goals in Rotary Club Central by September 1st (attach list of clubs)
2. Engage at least 10 Rotary Alumni living in your district in Rotary/Rotaract activities (Provide details in narrative)
3. Work with district's Rotary Foundation and Public Image teams to share at least five powerful stories of Rotary service (Provide details & examples in narrative)
4. Work with Public Image team to feature at least ten activities that engage members throughout the district (Share examples)
5. Participate in implementation of at least one "One Summit" training with district Public Image, Polio Plus and Rotary Foundation teams to show the importance of all areas working together
6. Other significant and innovative initiatives that didn't fit into any of the above categories (Describe in narrative... be specific)



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*Ending Polio is Rotary's most significant priority and will fulfill a promise we made to the children of the world. While we have made great progress, we must keep going! As polio becomes less visible and our membership changes, we need to work hard to keep the importance of polio eradication in front of our members. Developing plans and taking action will help us reach our goal of a polio free world!*

### CATEGORY 1: TEAM MAKE-UP

1. Have a District Polio Plus Team made up of at least three members, identified by September 1st, that meets at least four times during the year (List members and dates of meetings)
2. Establish Polio Plus Team goals by September 1 that are clear and measurable (Send a copy to the Zone EPN Coordinators by September 1 and include in submission)
3. Promote the district Polio Plus Team, resources, and activities on the district website (Describe in narrative)
4. Identify roles/responsibilities of team members (Describe in narrative)
5. Develop a succession plan for Polio Plus Team members to ensure continuity (Describe in narrative)
6. Other significant and innovative team make-up related initiatives (Describe in narrative)

### CATEGORY 2: TRAINING/COMMUNICATION

1. 100% of clubs have a Rotary Polio Plus team leader identified in My Rotary
2. Conduct at least two District Polio Plus Seminars/Workshops with different purposes (Please attach agenda and provide dates/locations)
3. At least 50% of clubs have a member complete a Polio Plus related course on Rotary's Learning Center
4. The Polio Plus Team leader, or another significant Team Member (not a Zone officer) attends the Polio Plus training session at the 2022 Zone Institute in Minneapolis, Sept 14-18 or the 2022 Multidistrict Training Institute in Pflugerville, Tx, August 5-6 (Include name/position)
5. The Polio Plus Team leader, or another significant Team Member, participate in regional team calls/meetings on a regular basis, attending no less than 75% of meetings (Include name/attendance)
6. Other significant and innovative training/communication related initiatives (Describe in narrative)

### CATEGORY 3: POLIO PLUS GIVING

1. Develop a specific plan with actionable steps to increase Polio Plus giving in district (include a copy of the plan)
2. By June 30, 2023, increase the overall Polio Plus contributions by clubs/members, as compared to 2021-22 (Include 2021-22 and 2022-23 per capita amounts)
3. By June 30, 2023, increase the number of members who contribute to Polio Plus by 5%, as compared to 2021-22 (Include 2021-22 and 2022-23 donor counts)
4. By June 30, 2023, increase the number of clubs who contribute the requested amount of \$1,500 to Polio Plus, as compared to 2021-22 (Include 2021-22 and 2022-23 club counts)
5. By June 30, 2023, ensure that 100% of clubs have contributed to Polio Plus (Include District Fundraising Analysis showing 100%)
6. Other significant and innovative Polio Plus giving related initiatives (Describe in narrative)





#### **CATEGORY 4: PROMOTION**

1. Develop a specific plan with actionable steps to increase awareness of Polio Plus in the communities in your district (include a copy of the plan)
2. Hold at least one district-sponsored End Polio Now event in 2022-23 (include type of event/location/date)
3. Work with district Public Image team (as needed) to develop articles/letters to the editor that can be published in at least four newspapers in conjunction with World Polio Day, which is October 23 (Submit copies/links of articles/letters to editor)
4. Work with district Public Image team to promote World Polio Day so at least 10 clubs submit an event to The Rotary Foundation (include list of clubs that submitted their events)
5. Work with district Public Image team (as needed) to develop articles/letters to the editor that can be published in at least four newspapers in conjunction with World Immunization Week (Submit copies/links of articles/letters to editor)
6. Other significant and innovative promotion related initiatives (Describe in narrative)

#### **CATEGORY 5: CLUB COMMUNICATION**

1. Develop a specific plan with actionable steps to increase awareness of Polio Plus within district membership (include a copy of the plan)
2. In conjunction with the Public Image and Rotary Foundation teams, help at least 50% of clubs in your district to promote World Polio Day on social media (submit list of clubs/links)
3. Help at least 50% of clubs promote and recognize World Immunization Week, which is typically the last week in April (Submit list of clubs/links)
4. Polio Plus Team members deliver presentations to at least 50% of clubs regarding the importance of Polio eradication and motivate them to donate (Include list of clubs presented to)
5. Participate in implementation of at least one “One Summit” training with district Public Image, Rotary Foundation, and Membership teams to show the importance of all areas working together
6. Other significant and innovative club communication related initiatives (Describe in narrative)

#### **CATEGORY 6: OTHER**

1. Implement and promote a Polio Plus Society (members who make the commitment to give at least \$100 to Polio Plus every year) in the district and recognize those who join (Include promotional materials and list of members)
2. Encourage clubs to hold events that will help raise funds for, and increase awareness of, Rotary’s Polio eradication efforts, with a goal of at least eight clubs having these events (Include list of clubs that had public facing Polio events)
3. At least 95% of clubs in your district set Polio Plus goals in Rotary Club Central by September 1st (attach list of clubs)
4. Work with DRFC to provide at least bi-monthly (six times during the year) progress updates so club leadership know where they stand in relation to their Polio Plus goals (Include dates and examples of communications)
5. In support of Rotary’s commitment to diversity, equity, and inclusion, work with other district leaders to organize and conduct at least three inclusive virtual or in-person events for a diverse group of Polio Plus supporters (Include details/explanation of these three events)
6. Other significant and innovative initiatives that didn’t fit into any of the above categories (Describe in narrative)





*While the impact we make on the world around us is significant, we can't maximize our impact without telling people who we are and what we do. Creating a positive public image in our communities and within our clubs is essential to engage people so they feel an emotion connection to our efforts, and become more likely to give their time, energy, and money to Rotary. This public image doesn't happen by accident, but through many activities we can build our image to increase our impact!*

#### CATEGORY 1: TEAM MAKE-UP

1. Have a District Public Image Team made up of at least five members, identified by September 1, that meets at least four times during the year (List members and dates of meetings)
2. Establish Public Image Team goals by September 1 that are clear and measurable (Send a copy to the RPIC by September 1 and include in submission)
3. Promote the Public Image Team, resources, and activities on the district website (Describe in narrative)
4. Identify roles/responsibilities of team members (Describe in narrative)
5. Develop a succession plan for Public Image Team members to ensure continuity (Describe in narrative)
6. Other significant and innovative Public Image Team related initiatives (Describe in narrative)

#### CATEGORY 2: TRAINING/COMMUNICATION

1. At least 75% of clubs have a Rotary Public Image team leader identified in My Rotary
2. Conduct at least two District Public Image Training Seminars/Workshops with different purposes (Please attach agenda and provide dates/locations)
3. At least 50% of clubs have a member complete a Public Image related course on Rotary's Learning Center
4. The Public Image Team leader, or another significant Team Member (not a Zone officer) attends the Public Image training session at the 2022 Zone Institute in Minneapolis, Sept 14-18 or the 2022 Multidistrict Training Institute in Pflugerville, Tx, August 5-6 (Include name/position)
5. Create a "New Year" (July 1-June 30) checklist with Public Image related activities or objectives clubs can accomplish (include checklist in submission)
6. Other significant and innovative training related initiatives (Describe in narrative)

#### CATEGORY 3: BRAND CONSISTENCY

1. Have brand compliant district website and at least two social media sites (provide web addresses)
2. Conduct training for clubs highlighting importance of proper branding (provide date/location/agenda)
3. Conduct an audit of club websites and social media sites (attach audit)
4. 60% or more of clubs have websites and social media that adhere to brand standards (shown within audit details)
5. 90% or more of clubs have websites and social media that adhere to brand standards (shown within audit details)
6. Other significant and innovative brand consistency related initiatives (Describe in narrative)

#### CATEGORY 4: SOCIAL MEDIA

1. Have at least two district social media accounts (provide web addresses)
2. Promote at least two district or club programs/projects each month (include links to the posts)
3. Utilize People of Action materials at least 10 times in social media posts (include examples)



4. Develop, promote, and utilize at least one district hashtag on social media (include hashtag/site)
5. Create and post at least two videos promoting a club or district project/initiative (include links to videos)
6. Other significant and innovative social media related initiatives (Describe in narrative)

#### **CATEGORY 5: COMMUNICATION WITH CLUBS/MEMBERS/PUBLIC**

1. Identify and promote at least 50 club events on district website and/or social media (include links)
2. Promote Rotary Showcase so at least 20 clubs enter a project on Showcase (include list/links)
3. Promote at least three club or district events in local traditional media (provide examples)
4. Create a press release template and have at least 50% of clubs submit a press release to local media (include copies of template and club press releases)
5. Submit at least five press releases for club or district activities/initiatives to media in your district (include copies of press releases)
6. Other significant and innovative communication related initiatives (Describe in narrative)

#### **CATEGORY 6: PARTNERSHIPS**

1. Partner with another district in at least one Public Image initiative (include details and collateral)
2. Partner with another organization to leverage promotion of Rotary district and clubs (include details and collateral)
3. Work with district Membership team to feature at least ten activities that engage members throughout the district (Share examples)
4. Work with district's Rotary Foundation, Polio Plus and Membership teams to share at least five powerful stories of Rotary service (Provide details & examples in narrative)
5. Participate in implementation of at least one "One Summit" training with district Rotary Foundation, Polio Plus and Membership teams to show the importance of all areas working together
6. Other significant and innovative partnership related initiatives (Describe in narrative)

#### **CATEGORY 7: OTHER**

1. At least 95% of clubs in your district set Rotary Public Image goals in Rotary Club Central by September 1 (attach list of clubs)
2. District Public Image team members deliver presentations to at least 40% of clubs regarding the importance of telling our story and providing actionable steps to increase the club's profile in the community (include list of clubs/dates of presentations)
3. Work with district leaders to identify clubs that plan to conduct Rotary Days of Service and help them tell stories that comply with brand guidelines. Provide at least four examples (Include dates/details of Days of Service and promotional activities)
4. Promote World Polio Day so at least 10 clubs submit an event to End Polio Now (include list of clubs that submitted their events)
5. In support of Rotary's commitment to diversity, equity, and inclusion, work with other district leaders to organize and conduct at least three inclusive virtual or in-person events for a diverse group of Foundation supporters (Include details/explanation of these three events)
6. Other significant and innovative initiatives that didn't fit into any of the above categories (Describe in narrative)



# ROTARY FOUNDATION CHALLENGE

Activities for July 1, 2022 – June 30, 2023

*The Rotary Foundation helps maximize the impact of our projects through leveraging the financial resources and expertise of our members throughout the world. Without The Rotary Foundation, we would be a network of clubs doing our own projects with our own money. We can dream bigger because of The Rotary Foundation, and our impact grows as a result. It takes planning and implementation of activities to engage our members to utilize and give to The Rotary Foundation, but the sky is the limit on what we can achieve!*

## CATEGORY 1: TEAM MAKE-UP

1. Have a District Rotary Foundation Team made up of at least seven members, identified by September 1st that meets at least quarterly. These positions should be focused on the Annual Fund, Paul Harris Society, Endowment and Major Gifts, Grants, Polio Plus, Scholarships, and Peace Fellows (List members and dates of meetings)
2. Establish Rotary Foundation Team goals by September 1st that are clear and measurable (Send a copy to the Zone Rotary Foundation Coordinator by September 1 and include in submission)
3. Rotary Foundation Team, resources, and activities promoted on the district website (Describe in narrative)
4. Identify roles/responsibilities of team members that include fundraising, grants, and scholarships (Describe in narrative)
5. Develop a succession plan for Foundation Team members to ensure continuity (Describe in narrative)
6. Other significant and innovative team make-up related initiatives (Describe in narrative)

## CATEGORY 2: TRAINING/COMMUNICATION

1. At least 90% of clubs have a Rotary Foundation team leader identified in My Rotary
2. Conduct at least two District Rotary Foundation Training Seminars/Workshops with different purposes (Please attach agenda and provide dates/locations)
3. At least 50% of clubs have a member complete a TRF related course on Rotary's Learning Center
4. The DRFC, or another significant Team Member (not a Zone officer) attends the Rotary Foundation training session at either the 2022 Zone Institute in Minneapolis, Sept 14-18 or the 2022 Multidistrict Training Institute in Pflugerville, Tx, August 5-6 (Include name/position)
5. Provide at least bi-monthly (six times during the year) progress updates so club leadership know where they stand in relation to their giving goals (Include dates and examples of communications)
6. Other significant and innovative training/communication related initiatives (Describe in narrative)

## CATEGORY 3: ANNUAL FUND

1. Develop a specific plan with actionable steps to increase Annual Fund giving in district (include a copy of the plan)
2. At least 95% of clubs in your district set TRF Annual Fund goal in Rotary Club Central by September 1 (attach list of clubs)
3. By June 30, 2023, increase the district's overall per capita contribution to the Annual Fund by at least \$5.00, as compared to 2021-22 (Include 2021-22 and 2022-23 per capita amounts)
4. Increase the number of members giving through Rotary Direct by 5%, as compared to 2021-22 (Include the 2021-22 and 2022-23 counts)
5. Increase the number of EREY (Every Rotarian Every Year) participants in the district by 10%, as compared to 2021-22 (Include 2021-22 and 2022-23 EREY counts)
6. Increase the active number of Paul Harris Society members in the district by 5%, as compared to 2021-22. Active means fulfilling their \$1,000 commitment (Include the 2021-22 and 2022-23 PHS member counts)
7. Other significant and innovative Annual Fund related initiatives (Describe in narrative)



**CATEGORY 4: ENDOWMENT FUND**

1. Develop a specific plan with actionable steps to increase the amount of giving to the Endowment Fund (include a copy of the plan)
2. Identify at least 10 prospective Major Donors and the reasons for including them and provide the list to the Regional Endowment/Major Gifts Advisor (include confirmation email from E/MGA that the list was provided)
3. Increase the number of new Benefactors in the district by 10%, as compared to 2021-22 (Include the 2021-22 and 2022-23 Benefactor counts)
4. Increase the number of new Major Gifts by 10%, as compared to 2021-22 (Include the 2021-22 and 2022-23 major gift reports)
5. Increase the number of Bequest Society members in the district by at least 10, as compared to 2021-22 (Include the 2021-22 and 2022-23 Benefactor/Bequest Society reports)
6. Work with regional leaders and Rotary staff to conduct a Major Donor recognition or cultivation event (Provide date/location)
7. Other significant and innovative Endowment Fund related initiatives (Describe in narrative)

**CATEGORY 5: GRANTS**

1. Conduct at least two training sessions promoting the importance of Rotary Foundation Grants (provide dates/locations)
2. Increase the number of Global Grants supported by your district's District Designated Funds (DDF), as compared to 2021-22 (Include a list of the 2021-22 and 2022-23 Global Grants supported, including grant number, DDF contribution, cash from clubs in your district, and total project amount)
3. Reduce the amount of "carryforward" DDF by at least 5%, as compared to 2021-22 (Provide the 2021-22 and 2022-23 "carryforward" amounts)
4. Ensure that all Global Grants have current reporting on June 30, 2023 (Provide list showing that all reports are current)
5. Promote, and have at least two grants that use resources such as TRF Cadre of Technical Advisors, Rotary Action Groups, and district international service chairs (Provide summary in narrative)
6. Other significant and innovative grants related initiatives (Describe in narrative)

**CATEGORY 6: PARTNERSHIPS**

1. Work with district Public Image team to align promotional plans for maximum effectiveness (include copy of plan)
2. Increase the number of clubs that participate in funding District or Global grants that other clubs in your district sponsor, as compared to 2021-22 (Provide number of "funding partner clubs" for 2021-22 and 2022-23 for all District & Global Grants sponsored in your district)
3. Partner with other districts to provide funding to at least two grants sponsored by clubs in other districts (provide list of projects)
4. Establish relationships with at least two non-Rotary organizations/businesses to act as funding partners ("cooperating partners") on Global Grants sponsored within your district (Provide list of grants/organizations/details)
5. Participate in implementation of at least one "One Summit" training with district Public Image, Polio Plus and Membership teams to show the importance of all areas working together
6. Other significant and innovative partnership related initiatives (Describe in narrative)



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## ROTARY FOUNDATION CHALLENGE

Activities for July 1, 2022 – June 30, 2023

### CATEGORY 7: OTHER

1. Significantly utilize at least one Rotary Alumnus in a district-sponsored event (Include name of alumnus, alumnus activity, event, and type of alumnus participation at event)
2. During 2022-23, endorse a candidate for a Rotary Peace Fellowship, with a “bonus point” if they are selected (Include name and proof of endorsement, along with confirmation of selection if applicable)
3. Rotary Foundation Team members deliver presentations to at least 50% of clubs regarding the importance of giving to the Rotary Foundation and the impact donors have on beneficiaries (Include list of clubs presented to)
4. In support of Rotary’s commitment to diversity, equity, and inclusion, work with other district leaders to organize and conduct at least three inclusive virtual or in-person events for a diverse group of Foundation supporters (Include details/explanation of these three events)
5. Other significant and innovative initiatives that didn’t fit into any of the above categories (Describe in narrative... be specific)



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# Your Legacy, **ROTARY'S PROMISE**

Gifts to the Rotary Foundation's Annual Fund help people live better lives today. Gifts to the Rotary Foundation's Endowment support the same life-changing programs forever.

Endowed gifts can support any of Rotary's causes such as one of the seven areas of focus, or the Rotary Peace Centers. The most popular category of support from endowed gifts is SHARE, where net earnings from your endowed gift are split between the World Fund and your District. Worldwide, Rotary Districts are already receiving Millions of Dollars in support of their grant activities from endowed funds.

As a District Governor or other District officer, you have an important role in helping donors understand the impact they have on Rotary's Promise of service to the World, now and for many years to come.

## What Can I Do?

Here are a few examples of things you and your District can be doing to support Rotary's Endowment:

- Ask Clubs and Rotarians in your District to support the Endowment SHARE fund benefitting your District
- Encourage clubs to pursue Rotary's Promise recognition in which every club member pledges to be a Rotary Benefactor (leave at least \$1,000 to the Rotary Endowment as part of their estate plan)
- Conduct a Million Dollar Dinner campaign (12–18-month campaign), where Donors throughout the District are encouraged to make current or future gifts in support of the Endowment, with the aim of raising at least a Million Dollars in gifts and commitments, celebrated at the end by a dinner or other event

Our Regional Leadership Team wants to support your efforts as a District Leader to benefit your District and The Rotary Foundation. Here are some important resources to keep in mind:

Endowment/Major Gift Advisor for our Region:

Bill Harvey  
 Rotary Club of Omaha  
[paulharrisrocks@gmail.com](mailto:paulharrisrocks@gmail.com)

### Major Gift Officers at Rotary International

Rachel Greenhoe  
[Rachel.Greenhoe@rotary.org](mailto:Rachel.Greenhoe@rotary.org)  
 Districts 5580, 5610, 5950, 5960,  
 5970, 6000, 6220, 6250, 6270,  
 6420, 6440, 6450

Shelley Hill  
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 Districts 5790, 5810, 5840,  
 5870, 5890, 5910, 5930

Eric Thompson  
[Eric.Thompson@rotary.org](mailto:Eric.Thompson@rotary.org)  
 Districts 5630, 5650, 5680, 5710



# ZONE LEADERSHIP DIRECTORY

## ZONES 25B & 29 LEADERSHIP DIRECTORY

Rotary International Director, 2022-24: Pat Merryweather-Arges [dg645opat@aol.com](mailto:dg645opat@aol.com)

The Rotary Foundation Trustee, 2022-26: Greg Podd [greg@pfscpa.com](mailto:greg@pfscpa.com)

### MEMBERSHIP TEAM

Rotary Coordinator:

#### Assistant Coordinators:

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#### Innovative Club Advocates:

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### END POLIO NOW COORDINATORS

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### ROTARY FOUNDATION TEAM

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**FOR MORE INFORMATION ON THESE TEAMS, GO TO [www.zones25b-29.org](http://www.zones25b-29.org)**



