

**Rotary**  
Zones 25B & 29



# REGIONAL ROTARY ROADMAP

*Designed to provide Districts with ideas and motivation to increase activity and success!*



**2024-2025**

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

*This is a very exciting time to be leading Rotary International Districts and Clubs in 2024-2025 as we transition to setting goals and plans for three years. The multi-year approach will require District Governors and Leaders to use the Rotary Action Plan as their basis for the three-year plan.*

*The Roadmap is a valuable tool for District Governors and their teams to use in creating plans to achieve the goals. Not all goals can be accomplished in one year and that is why it is important to include the District Governor-Elect, District Governor-Nominee and current and future leaders.*

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

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

*Your Zone Champion, Three Year Goal and Plan Leads, Zone Coordinators and their assistants will be working with you and your teams throughout the years on how you can best take advantage of the Roadmap best practices and strategies to achieve your goals.*

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

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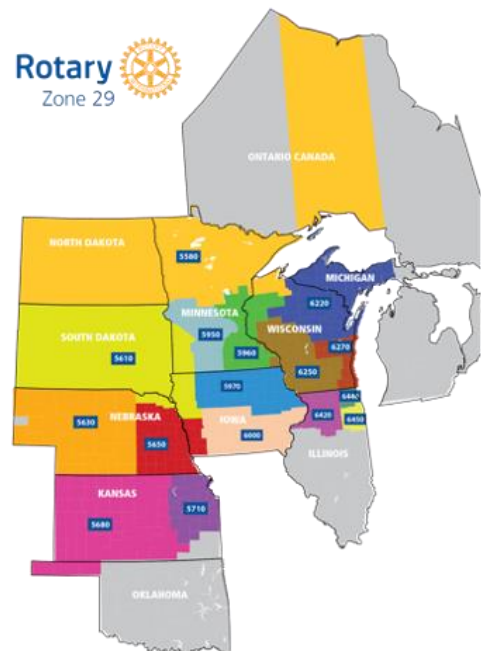
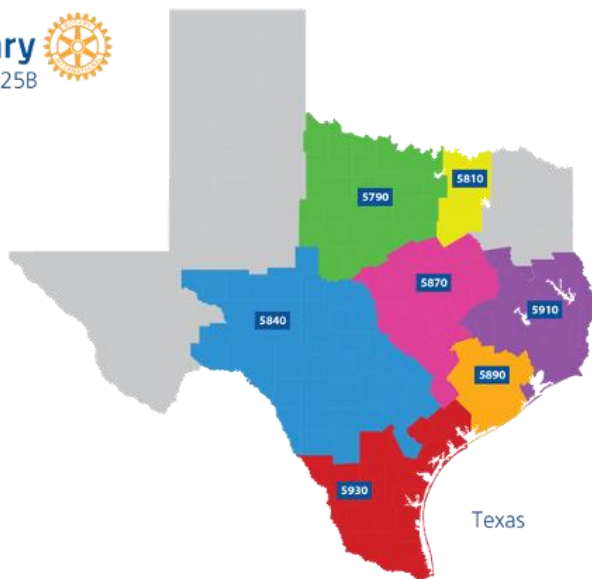
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## Rotary's Vision

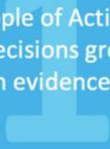
*Together, we see a world where people unite and take action to create lasting change - across the globe, in our communities, and in ourselves.*



# Rotary International and Rotary Foundation 2024-25 Annual Goals

## IMPACT

As People of Action we make decisions grounded in evidence.

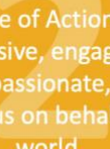


### GOALS FOR PRIORITY 1 - INCREASE OUR IMPACT

- Eradicate polio and highlight Rotary's role.
- Increase the overall number of clubs and individual Rotary members giving to The Rotary Foundation whilst increasing contributions to the Annual Fund and PolioPlus and building the Endowment Fund to \$2.025 billion by 2025.
- Enable and measure effective club, district, and international programs and projects particularly in Rotary's Areas of Focus.

## REACH

As People of Action we are inclusive, engaging, compassionate, and ambitious on behalf of the world.

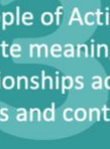


### GOALS FOR PRIORITY 2 - EXPAND OUR REACH

- Strengthen existing and develop new partnerships to elevate Rotary's global profile.
- Establish and nurture new, innovative clubs and participant engagement channels.
- Raise awareness and understanding of Rotary and Rotary members as People of Action.

## ENGAGEMENT

As People of Action we create meaningful relationships across decades and continents.

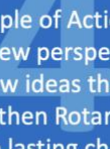


### GOALS FOR PRIORITY 3 - ENHANCE PARTICIPANT ENGAGEMENT

- Enhance member engagement tools that support Rotary's core values through personal growth, leadership development, service, and networking opportunities.
- Reduce the number of new members leaving within the first year of membership.
- Increase collaboration among participants particularly Rotary and Rotaract clubs.
- Further Rotary's commitment to Diversity, Equity, and Inclusion within our clubs, our leadership and throughout the Rotary family.

## ADAPT

As People of Action we seek new perspectives and new ideas that can strengthen Rotary and create lasting change.



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

- Review Rotary's programs and offerings to ensure their relevance and effectiveness.
- Support and encourage the use of virtual connectivity to optimize in-person meetings, training, fundraising, and service projects.
- Continue to review our service delivery and volunteer leadership structure to improve effectiveness, responsibility, and accountability.

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

# General Program OVERVIEW AND RULES

## GOAL:

To provide actionable and measurable strategies that will help districts to focus on activities 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 may submit the checklist, a two-page summary of activities, and one page of supporting documents for each area. If a district completes at least ONE activity in each category, they will be recognized with the "Regional Commendation" 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 Commendation, districts will be judged on their summaries of activities, with a winning "District of the Year" chosen in each 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 through their actions in 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 roadmap, 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 Rotary Roadmap include:

- Providing direction to districts to help determine what to focus on in their planning activities (eliminating the practice of reinventing the wheel each year).
- Helping create good habits in districts that can be built upon to create sustainable success.
- Building teamwork within districts so more can be accomplished when people work together.
- Encouraging idea sharing between districts.
- Allowing for recognition of a job well done, which builds additional momentum for the future.
- Providing a historical record of what was accomplished each year.
- Creating friendly competition that will result in all districts doing more (and benefiting everyone).
- It's fun!

## GENERAL RULES

- Districts will have the full 2024-25 Rotary year to complete the activities.
- All submissions should be received no later than August 1st, 2025, 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, 2025.
- 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 2025 Zone Institute.

*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

- ★ Have a District Membership Team made up of at least five members, with subcommittees including attraction, engagement, leads, new club development, and Rotaract, **Enhance Participant Engagement.**
- ★ Establish a Membership Team goal that helps your clubs achieve the 3-year membership goal for your district, **Increase Our Impact.**
- Include your Membership Team, resources, and engagement activities on the district website (TIP: post larger initiatives to Rotary Showcase and/or "Rotary Best Practices" or "Rotary Voices" to share with others!), **Expand Our Reach.**
- Develop a succession plan for Membership Team members to ensure continuity, **Increase Our Ability to Adapt.**
- Deliver District Membership Team presentations to clubs regarding important membership topics, **Increase Our Impact.**
- Other significant and innovative district team make-up related initiatives that are in the overall District Membership Plan.

### CATEGORY 2: TRAINING/COMMUNICATION

- ★ Complete the District Membership Committee Intermediate learning plan in the Learning Center, **Increase Our Ability to Adapt.**
- ★ Ensure the Membership Team member attends the Membership training session at the 2024 Zone Institute in San Antonio, TX, September 4-8, **Increase Our Impact.**
- Assist clubs with adding their Club Membership Chair into MyRotary.org, **Expand Our Reach.**
- Conduct one or more District Membership Training Seminars or Workshops, **Enhance Participant Engagement.**
- Provide regular progress updates so club leaders know where they stand in relation to their membership goals, **Increase Our Impact.**
- Other significant and innovative training/communication related initiatives that are in the overall District Membership Plan.

### CATEGORY 3: MEMBER ENGAGEMENT

- ★ Create a plan to retain at least eighty-five percent of existing members in your district, **Increase Our Ability to Adapt.**
- ★ Implement a Membership Olympics initiative to encourage clubs to proactively improve the retention of their members, **Expand Our Reach.**
- Identify and nurture negative growth clubs using resources available, **Increase Our Ability to Adapt.**
- Work with club leaders to motivate and inspire them to set attainable membership goals, **Increase Our Impact.**
- Work with Club Membership Chairs as they develop and implement activities that will have a direct impact on membership and struggling clubs, **Expand Our Reach.**
- Work with your Rotary and Rotaract clubs to implement assessments (surveys) of all club members to help clubs determine the needs of its members, **Enhance Participant Engagement.**
- Other significant and innovative membership engagement related initiatives that are in the overall District.



### CATEGORY 4: MEMBER ATTRACTION

1. ★ Develop a specific District Membership plan with actionable steps that align with this Membership Roadmap, **Increase Our Impact.**
2. ★ Create a plan to help your clubs increase the number of new members by at least one percent, **Expand Our Reach.**
3. ★ Create a plan to increase the net number of Rotaract members by at least three percent, **Expand Our Reach.**
4. Encourage Rotary and Rotaract club presidents to sponsor a new member into their club, or another club, **Expand Our Reach.**
5. Design and distribute to Rotary and Rotaract clubs a new member orientation program that can be implemented for all new members, **Enhance Participant Engagement.**
6. Develop and implement a strategy to act on Rotary's Leads Program, **Increase Our Ability to Adapt.**
7. Other significant and innovative member attraction related initiatives that are in the overall District Membership Plan.

### CATEGORY 5: NEW CLUB DEVELOPMENT

1. ★ Engage existing Rotary clubs to charter at least one Service Companion Club, **Expand Our Reach.**
2. Hold training sessions on innovative club formats, **Increase Our Ability to Adapt.**
3. Work with Zone Innovative Club Advocates and/or Assistant Rotary Coordinators to use the Grow Rotary Tool to identify locations that can support new clubs, **Expand Our Reach.**
4. Create a sustainable support plan for new Rotary and Rotaract clubs to help them thrive and retain members over the long term, **Enhance Participant Engagement.**
5. Showcase new innovative clubs and demonstrate how new Rotary and Rotaract clubs can make your district more vibrant, **Increase Our Impact.**
6. Include other innovative new club initiatives, or other activities that are in the overall District Membership Plan.

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

1. Develop a specific plan with actionable steps to promote diversity, equity, and inclusion in our Rotary and Rotaract clubs, **Enhance Participant Engagement.**
2. Help Rotary and Rotaract clubs create service projects that appeal to women, **Increase Our Impact.**
3. Help Rotary and Rotaract clubs create service projects that appeal to people under forty years of age, **Increase Our Impact.**
4. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct events that engage a diverse cross-section of members, **Expand Our Reach.**
5. Encourage clubs to make leadership roles more accessible and to invite more members into those roles, **Increase Our Ability to Adapt.**
6. Other significant and innovative DEI related initiatives that are in the overall District membership Plan.



**CATEGORY 7: OTHER**

1. Use ideas and tips from Zone leadership for successful activities, **Increase Our Ability to Adapt.**
2. Engage Rotary Alumni living in your district in Rotary and Rotaract club activities, **Enhance Participant Engagement.**
3. Work with district's Rotary Foundation and Public Image teams to share powerful stories of Rotary service, **Expand Our Reach.**
4. Work with the Public Image team to feature activities that engage Rotary and Rotaract club members throughout the district, **Increase Our Impact.**
5. Take part in implementing a "One Summit" or Vibrant Club Workshop training with district Public Image, Polio Plus and Rotary Foundation teams to show the importance of all areas working together and the synergy that comes from those efforts, **Enhance Participant Engagement.**
6. Other significant and innovative initiatives not included in other categories that are in the overall District Membership Plan.

**BELIEVE  
THERE IS  
GOOD IN  
THE WORLD**

*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

- ★ Have a District Polio Plus Team that meets regularly made up of at least three members, **Enhance Participant Engagement.**
- ★ Establish Polio Plus Team goals that are clear and measurable, **Increase Our Impact.**
- Promote the district Polio Plus Team, resources, and activities on the district website, **Expand Our Reach.**
- Identify roles/responsibilities of team members, **Increase Our Ability to Adapt.**
- Develop a succession plan for Polio Plus Team members to ensure continuity, **Increase Our Impact.**
- Other significant and innovative Polio Plus team make-up related initiatives.

### CATEGORY 2: TRAINING/COMMUNICATION

- ★ Assist clubs in identifying a Rotary Polio Plus team leader in their club, **Expand Our Reach.**
- ★ The Polio Plus Team leader, or a significant Team Member attends the Polio Plus training session at the 2024 Zone Institute in San Antonio, TX, September 4-8 or the 2024 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 2-4, **Increase Our Impact.**
- Conduct one or more District Polio Plus Seminars or Workshop, **Enhance Participant Engagement.**
- Encourage clubs to have a member review the resources on the EndPolioNow.org website, **Increase Our Ability to Adapt.**
- The Polio Plus Team leader, or a significant Team Member, participates in regional team calls/meetings on a regular basis, **Increase Our Impact.**
- Other significant and innovative training/communication related initiatives regarding polio eradication.

### CATEGORY 3: POLIO PLUS GIVING

- ★ Develop a specific plan with actionable steps to increase Polio Plus giving in the district, **Increase Our Ability to Adapt.**
- ★ Increase the overall Polio Plus contributions by clubs/members, **Increase Our Impact.**
- ★ Increase the number of members who contribute to Polio Plus, **Enhance Participant Engagement.**
- Increase the number of clubs who contribute the requested amount of \$1,500 to Polio Plus, **Enhance Participant Engagement.**
- Work to encourage 100% of clubs to contribute to Polio Plus, **Expand Our Reach.**
- Work with DRFC to cultivate potential Major Donors to PolioPlus, **Expand Our Reach.**
- Increase the amount of District Designated Funds contributed to PolioPlus, with a goal of 20% annually, **Increase Our Impact.**
- Other significant and innovative Polio Plus giving related initiatives.



### CATEGORY 4: PROMOTION

- ★ Develop a specific plan with actionable steps to increase awareness of Polio Plus in the communities in your district, **Increase Our Ability to Adapt.**
- ★ Hold at least one district-sponsored End Polio Now event in 2024-25, **Increase Our Impact.**
- ★ Work with district Public Image team 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, **Expand Our Reach.**
- Work with district Public Image team to promote World Polio Day and encourage clubs to submit an event to End Polio Now, **Enhance Participant Engagement.**
- Work with district Public Image team to develop articles/letters to the editor that can be published in newspapers in conjunction with World Immunization Week, **Expand Our Reach.**
- Other significant and innovative promotion related initiatives regarding polio eradication.

### CATEGORY 5: CLUB COMMUNICATION

- ★ Develop a specific plan with actionable steps to increase awareness of Polio Plus within district membership, **Increase Our Ability to Adapt.**
- In conjunction with the Public Image and Rotary Foundation teams, help clubs in your district promote World Polio Day on social media, **Expand Our Reach.**
- Help clubs promote and recognize World Immunization Week, which is typically the last week in April, **Increase Our Impact.**
- Polio Plus Team members deliver presentations to clubs regarding the importance of Polio eradication and motivate them to donate, **Enhance Participant Engagement.**
- Take part in implementing a "One Summit" training with district Public Image, Rotary Foundation, and Membership teams to show the importance of all areas working together and the synergy that comes from those efforts, **Enhance Participant Engagement.**
- Other significant and innovative club communication related initiatives regarding polio eradication.

### CATEGORY 6: OTHER

- ★ 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, **Enhance Participant Engagement.**
- ★ Work with clubs in your district to set Polio Plus goals in Rotary Club Central, **Increase Our Impact.**
- Encourage clubs to hold events that will help raise funds for, and increase awareness of, Rotary's Polio eradication efforts, **Expand Our Reach.**
- Work with DRFC to provide regular progress updates so club leaders know where they stand in relation to their Polio Plus goals, **Increase Our Impact.**
- Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct polio related events that engage a diverse cross-section of members, **Increase Our Ability to Adapt.**
- Other significant and innovative initiatives regarding polio eradication that didn't fit into any of the above categories.

*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 emotional 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 that meets regularly made up of at least four members, **Enhance Participant Engagement.**
2. ★ Establish Public Image Team goals that are clear and measurable, **Increase Our Impact.**
3. Promote the Public Image Team, resources, and activities on the district website, **Expand Our Reach.**
4. Identify roles/responsibilities of team members, **Increase Our Impact.**
5. Develop a succession plan for Public Image Team members to ensure continuity, **Increase Our Ability to Adapt.**
6. Other significant and innovative Public Image Team related initiatives.

### CATEGORY 2: TRAINING/COMMUNICATION

1. ★ Work with clubs to have a Rotary Public Image team leader identified in My Rotary, **Expand Our Reach**
2. ★ Conduct one or more District Public Image Training Seminars or Workshop, and invite Regional Public Image Team to assist in implementation of event, **Enhance Participant Engagement..**
3. ★ The Public Image Team leader, or a significant Team Member attends the Public Image training session at the 2024 Zone Institute in San Antonio, TX, September 4-8 or the 2024 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 2-4, **Increase Our Impact.**
4. Encourage clubs to have a member complete a Public Image related course on Rotary's Learning Center, **Increase Our Ability to Adapt.**
5. Create a "Public Image Checklist" with Public Image related activities or objectives clubs can accomplish over the course of the Rotary year **Increase Our Impact.**
6. Other significant and innovative Public Image training related initiatives.

### CATEGORY 3: BRAND CONSISTENCY

1. ★ Have brand compliant district website and social media sites, **Expand Our Reach.**
2. ★ Conduct training for clubs highlighting importance of proper branding, **Enhance Participant Engagement.**
3. ★ Conduct an audit of club websites and social media sites, **Increase Our Impact.**
4. Work with clubs to have websites and social media that adhere to brand standards, **Increase Our Ability to Adapt.**
5. Other significant and innovative brand consistency related initiatives.



### CATEGORY 4: SOCIAL MEDIA

1. ★ Have at least two district social media accounts, **Expand Our Reach**.
2. ★ Use People of Action materials in social media posts, **Increase Our Impact**.
3. ★ Promote district or club programs/projects each month, **increase Our Impact**.
4. Develop, promote, and use a district hashtag on social media, **Enhance Participant Engagement**.
5. Create and post videos promoting a club or district project/initiative, **Increase Our Ability to Adapt**.
6. Other significant and innovative social media related initiative.

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

1. ★ Identify and promote club events on district website and/or social media, **Increase Our Ability to Adapt**.
2. ★ Create a press release template and encourage clubs to submit a press release to local media, **Increase Our Impact**.
3. Promote Rotary Showcase so clubs enter a project on Showcase, **Enhance Participant Engagement**.
4. Promote club or district events in local traditional media, **Enhance Participant Engagement**.
5. Submit press releases for club or district activities/initiatives to media in your district, **Expand Our Reach**.
6. Other significant and innovative communication related initiatives.

### CATEGORY 6: PARTNERSHIPS

1. ★ Partner with another district in a Public Image initiative, **Increase Our Impact**.
2. ★ Work with district's Rotary Foundation, Polio Plus and Membership teams to share powerful stories of Rotary service, **Increase Our Impact**.
3. Work with district Membership team to feature activities that engage members throughout the district, **Enhance Participant Engagement**.
4. Partner with another organization to leverage promotion of Rotary district and clubs, **Expand Our Reach**.
5. Take part in implementing a "One Summit" training with district Rotary Foundation, Polio Plus and Membership teams to show the importance of all areas working together and the synergy that comes from those efforts, **Increase Our Ability to Adapt**.
6. Other significant and innovative partnership related initiatives.



**CATEGORY 7: OTHER**

1. ★ Work with clubs in your district to set Rotary Public Image goals in Rotary Club Central, **Increase Our Impact.**
2. ★ District Public Image team members deliver presentations to clubs regarding the importance of telling our story and providing actionable steps to increase the club's profile in the community, **Enhance Participant Engagement.**
3. Promote World Polio Day and encourage clubs to submit an event to End Polio Now, **Enhance Participant Engagement.**
4. 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, **Expand Our Reach.**
5. Encourage clubs and district teams to tell stories of effective programs and projects, especially in mental health and Rotary's areas of focus, **Expand Our Reach.**
6. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct events that engage a diverse cross-section of members, **Increase Our Ability to Adapt.**
7. Other significant and innovative public image initiatives that didn't fit into any of the above categories.



*The Rotary Foundation helps maximize the impact of our projects by leveraging the financial resources and expertise of our members throughout the world, 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, 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 that meets regularly made up of several members. Positions should be focused on the Annual Fund, Paul Harris Society, Endowment and Major Gifts, Grants, Polio Plus, Scholarships, and Peace Fellows. Ensure that all members are identified in MyRotary.org, **Enhance Participant Engagement.**
2. ★ Establish Rotary Foundation Team goals that are clear and measurable, **Increase Our Impact.**
3. ★ Work to make Foundation giving an integral part of your district's culture, **Expand Our Reach.**
4. Develop a succession plan for Foundation Team members to ensure continuity, **Increase Our Ability to Adapt.**
5. Other significant and innovative Foundation Team make-up related initiatives.

### CATEGORY 2: TRAINING/COMMUNICATION

1. ★ Encourage every club to have a Rotary Foundation team leader identified in My Rotary, **Expand Our Reach.**
2. ★ The DRFC, or a significant Team Member, attends the Rotary Foundation training session at either the 2024 Zone Institute in San Antonio, TX, September 4-8 or the 2024 Rotary Multidistrict Training Institute in Pflugerville, Tx, August 2-4, **Increase Our Impact.**
3. Conduct one or more District Rotary Foundation Training Seminars or Workshops, **Enhance Participant Engagement.**
4. Encourage clubs to have a member complete a Foundation related course on Rotary's Learning Center, **Increase Our Ability to Adapt.**
5. Provide regular progress updates so club leaders know where they stand in relation to their giving goals, **Increase Our Impact.**
6. Other significant and innovative Foundation training/communication related initiatives.

### CATEGORY 3: ANNUAL FUND

1. ★ Work with every club in your district to set an Annual Fund goal in Rotary Club Central, **Increase Our Impact.**
2. ★ Develop a specific plan with actionable steps to increase Annual Fund giving in your clubs, **Increase Our Ability to Adapt.**
3. ★ Increase the number of your clubs that contribute to the Annual Fund by eliminating zero-giving clubs, **Expand Our Reach.**
4. ★ Increase the number of individual members (Rotary and Rotaract) who contribute to the Annual Fund by building 100% EREY and 100% Sustaining Member clubs, **Expand Our Reach.**
5. Increase the district's overall per capita contribution to the Annual Fund, **Increase Our Impact.**
6. Increase the number of members giving through Rotary Direct, **Enhance Participant Engagement.**

7. Increase the active number of Paul Harris Society members in the district. Active means fulfilling their \$1,000 commitment, **Enhance Participant Engagement.**
8. Other significant and innovative Annual Fund related initiatives.

### CATEGORY 4: ENDOWMENT FUND

1. Lead by example, with the District Governor and DRFCC making donations to the Endowment Fund by December 31 of the Rotary year, and encouraging other District leaders to do the same, **Increase or Impact.**
2. Form a District Endowment team to conduct a legacy event such as a Million Dollar Dinner with the goal of raising at least \$1,000,000 for the Endowment Fund of the Rotary Foundation, **Increase or Impact.**
3. Identify 5 prospective donors of Major Gifts (single gifts of \$10,000 or more) and provide the list to the Regional Endowment/Major Gifts Advisor, **Enhance Participant Engagement.**
4. Increase the number of new Benefactors in the district, **Expand Our Reach.**
5. Increase the number of new Major Donors in the district, **Enhance Participant Engagement.**
6. Increase the number of Bequest Society members in the district, **Enhance Participant Engagement.**
7. Other significant and innovative Endowment Fund related initiatives.

### CATEGORY 5: GRANTS

1. ★ Reduce the amount of "carryforward" DDF (District Designated Funds), **Increase Our Impact.**
2. ★ Work to make your grants high-quality and high impact. Build the practices, infrastructure, and capacity needed to define, measure, track, and analyze data from our service projects in a much more efficient way, **Increase Our Impact.**
3. ★ Conduct Grants training seminars that highlight best practices, lessons learned, and success stories, **Expand Our Reach.**
4. Ensure that all Global Grants have current reporting, **Enhance Participant Engagement.**
5. Encourage members to attend project fairs and district events to establish partnerships and learn from previous successful projects, **Enhance Participant Engagement.**
6. Encourage clubs to use resources such as the TRF Cadre of Technical Advisors, Rotary Action Groups, and District International Service Chairs in developing Global Grant applications, **Increase Our Ability to Adapt.**
7. Other significant and innovative grants related initiatives.

### CATEGORY 6: PARTNERSHIPS

1. ★ Increase the number of your clubs that participate in grants that other clubs in your district sponsor, **Enhance Participant Engagement.**
2. ★ Partner with other districts to provide funding to grants sponsored by clubs in other districts, **Enhance Participant Engagement.**
3. ★ Establish relationships with non-Rotary organizations/businesses to act as funding partners ("cooperating partners") on Global Grants sponsored within your district, **Expand Our Reach.**
4. Work with district Public Image team to align promotional plans for maximum effectiveness, **Increase Our Impact.**



5. Take part in implementing a "One Summit" training with district Public Image, Polio Plus and Membership teams to show the importance of all areas working together and the synergy that comes from those efforts, **Increase Our Ability to Adapt.**
6. Other significant and innovative partnership related initiatives.

**CATEGORY 7: OTHER**

1. ★ Tell your story to raise awareness of Rotary Foundation programs and to engage more Rotarian Participation in those programs, **Expand Our Reach.**
2. ★ Utilize Rotary Alumni in a district-sponsored event, **Enhance Participant Engagement.**
3. Endorse a candidate for a Rotary Peace Fellowship, **Increase Our Impact.**
4. Support Rotary's commitment to diversity, equity, and inclusion by working with other district leaders to organize and conduct events that engage a diverse cross-section of members, **Increase Our Ability to Adapt.**
5. Work with your District End Polio Now Team to develop plans to promote the importance of ending polio, **Increase Our Ability to Adapt.**
6. Encourage districts to give DDF to the Disaster Response Fund and promote successful disaster response grants, **Increase Our Impact.**
7. Other significant and innovative Foundation initiatives that didn't fit into any of the above categories.



# 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 or give \$1,000 to the Endowment currently).
- Conduct a Million Dollar Dinner campaign (12-18-month campaign), or other legacy event or program, in which Donors throughout the District are encouraged to make current or future gifts in support of the Endowment and other Foundation funds, 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:

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Rachel Greenhoe  
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 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  
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 Districts 5630, 5650, 5680, 5710



# Zone 25b & 29 LEADERSHIP DIRECTORY

Rotary International Director, 2022-24:	Pat Merryweather-Arges	<a href="mailto:dg6450pat@aol.com">dg6450pat@aol.com</a>
Rotary International Director, 2024-26:	Salvador Rizzo	<a href="mailto:salvador@rizzo.com.mx">salvador@rizzo.com.mx</a>
Rotary Foundation Trustee, 2022-24:	Greg Podd	<a href="mailto:greg@pfscpa.com">greg@pfscpa.com</a>
Rotary Foundation Trustee, 2024-26:	Jennifer Jones	<a href="mailto:jennifer.jones@rotary.org">jennifer.jones@rotary.org</a>
Rotary Action Plan Champion	Andrea Krauss	<a href="mailto:andrea.krauss@johnofarmer.com">andrea.krauss@johnofarmer.com</a>
Three-Year Goal and Plan Leaders	Kyle Haugen	<a href="mailto:jkylehaugen@gmail.com">jkylehaugen@gmail.com</a>
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## MEMBERSHIP

Regional Rotary Coordinator:	Alex Johnson	<a href="mailto:alex@laurexadvisors.com">alex@laurexadvisors.com</a>
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## END POLIO NOW

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## PUBLIC IMAGE

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## ROTARY FOUNDATION

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