



District Governor Shelby Rhodes
Weekly Newsletter
October 04, 2021



THIS EMAIL IS BEING SENT TO ALL DISTRICT 7475 ROTARIANS.

Happy Monday Rotarians!



Every October Rotarians focus on the global polio eradication initiative with World Polio Day on Sunday, October 24. Rotary made polio eradication one of its top priorities for more than 35 years ago.

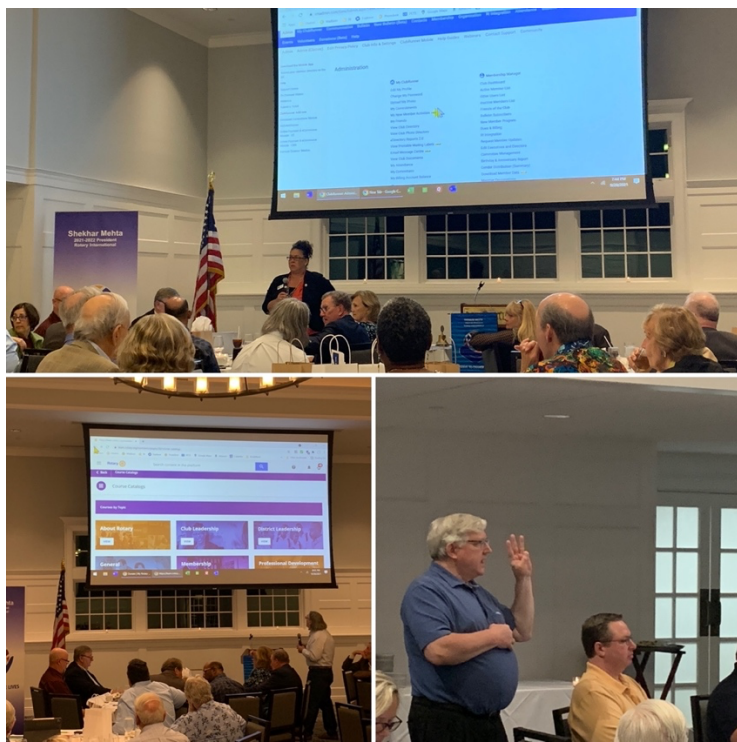
We have some good news this year:
JUST 2 CASES OF POLIO REPORTED IN 2 COUNTRIES SO FAR IN 2021.

We have some bad news:
THE FIGHT IS NOT OVER.

If Covid-19 showed us anything, it's those viruses spread more rapidly around the globe today than ever before. Polio will spread like wildfire crippling children once again if we don't keep focused on our goal: Complete, total global eradication.

Rotary's set-up a great website with plenty of polio information and tools for Clubs and members. Here you can learn more about polio eradication efforts, share information with their family, friends, and colleagues, and give to the Polio Plus program. [CLICK HERE TO VISIT THIS SITE](#).

If you are a Rotarian, then it's your responsibility to help eradicate polio. You can help by donating to Rotary at www.Rotary.org/give and selecting "Polio Fund".



ROTARY DISTRICT LEADERSHIP MEETING WAS A SUCCESS!

Forty-five members of the District Leadership Team plus Club Presidents and guests joined me last Tuesday for a night of learning and fellowship. Attendees received Committee Reports (copies attached) and learned about the Rotary Learning Center from PDG Frank Geraghty our District Trainer. And attendees heard from me about including diversity, equity, and inclusion, and doing a Club classification audit as ways to grow Club membership. I'm attaching hereto those membership handouts for everyone to use in their own Clubs. I'm even volunteering to come to your Club to do the same presentation! Send me an email if you are interested.

WHAT'S UP IN CLUBS AROUND THE DISTRICT:

Induct a new member? Holding a fundraiser? Presenting a Paul Harris Fellow/Major Donor recognition? Service projects? Social Event? ... These are all great things to share with your fellow Rotarians via our weekly Club news. [CLICK HERE](#) to access this week's article on the District website. How does your Club get included next week? Simply email your news to Rotary7475news@gmail.com. Our deadline is every Friday around 5 pm.

MEMBERSHIP UPDATE:

Here's a list of the Clubs who have inducted new members for the first quarter of the 2021-22 Rotary Year:

Club Name*	YTD Total	Jul	Aug	Sep
Morristown Rotary Club	10	5	3	2
Madison	5	1	4	-
Branchville	4	-	2	2
Westfield	4	-	2	2
Randolph	4	2	1	1
Roxbury	4	3	1	-
E-Club Dare to be Great	3	1	-	2
Livingston	3	1	2	-
Somerville Bridgewater	3	-	3	-
Dover	2	1	-	1
Fanwood-Scotch Plains	2	2	-	-
Skylands	2	-	2	-
Woodbridge-Perth Amboy	2	2	-	-
Montgomery Rocky Hill	2	-	-	2
Phillipsburg	2	-	-	2
South Amboy-Sayerville	2	-	-	2
Berkeley Heights	1	1	-	-
Branchburg	1	-	1	-
East Orange	1	1	-	-
Florham Park	1	-	1	-
Hamilton Township	1	1	-	-
Nutley	1	-	1	-
Old Bridge-Sayerville	1	-	1	-
Pequannock Valley	1	-	1	-
Somerset Hill	1	-	1	-
Trenton	1	1	-	-
Union	1	-	1	-
Watchung-Warren	1	-	1	-
Denville	1	-	-	1
Newton	1	-	-	1
Parsippany	1	-	-	1
Princeton Corridor	1	-	-	1
Rockaway	1	-	-	1
Roselle Roselle Park	1	-	-	1

*Must be entered into ClubRunner

YTD New Members	72	22	28	22
YTD Terminations	-71	-39	-12	-20
YTD Net	1	-17	16	2
Terminations (includes -12 for Lambertville)				

MEMBER INCENTIVE PROGRAM:

Win \$100.00! ... Every new member of Rotary has a Rotary Sponsor who is generally someone in the Club where the new member joins. Each month new member sponsors will be entered into a drawing and one sponsor will be selected to win a \$100.00 incentive check. View incentive program [HERE](#).

DON'T MISS THE FOLLOWING RECORDINGS:

You can also find these recordings on the district website under membership resources or on the District YouTube Channel

Lunch and Learn - September

[How to Form a New Rotary Club](#)

Orientation for New Member - September

[New Member Orientation Sept 2021](#)

How to Induct a New Member into your Club

[New Member Induction](#)

YOUTH EXCHANGE PROGRAM:

The Eastern State Student Exchange program (ESSEX) is planning to restart the youth exchange in the Fall 2022. If our District wishes to participate, we must now identify clubs who will support the exchange. ESSEX wants feedback from us by **October 20**. That means clubs who are interested must identify possible outbound students, identify host families who will take inbound students and determine whether their school district will accept a student from another country for the 2022-2023 school year. The cost for Essex to administer the program is \$250 per student. Any club who wishes to consider this program should contact PDG Jim Allison by email at JRA188@aol.com or by phone at 201-213-6382.

WHAT IS A ROTARY FOUNDATION BEQUEST SOCIETY MEMBER?

Those who have made commitments for future gifts of \$10,000 or more to The Rotary Foundation are invited to join the Bequest Society. Donors may elect to receive various benefits and recognition pieces commemorating their commitment at each new recognition level, including pins, crystals, named funds and special seating at the Rotary International Convention. A bequest gift of \$10,000 in your name to The Rotary Foundation creates a legacy of your generosity and compassion as you are helping many people live better lives around the world. Today there are more than 18,000 Bequest Society Members worldwide. Will you join them by leaving a gift to Rotary in your estate? For more information, I've attached a brochure.

DISTRICT GRANTS:

Once you complete your grant program login to ClubRunner on the District website to file your report and upload a photo(s). **Don't wait until the April 15, 2022!** ...District Grants Chair Pamela Singh can be reached at 1-908-202-6608 or pamelarsingh@gmail.com (remember the R) if you need any help.

DISTRICT GOVERNOR VISITS:

Inducting a new member? Holding a fundraiser? Presenting a Paul Harris Fellow/Major Donor recognition?

Community service projects? Social events? ... Those are all great opportunities for me to come visit with your Club.

Please work directly with District Chief of Staff Mark Hartmann. He can be reached at 1-973-296-9507 (cell/text)

or Mark@HartmannRhodes.com.

CLUBRUNNER – NEED HELP??

If you are the person responsible in your Club for maintaining your Club's website or entering/editing member information or setting up events or syncing and comparing membership between district and Rotary International or anything else ClubRunner related you can have a **45-minute** private lesson on how to use ClubRunner via Zoom. There is

no cost for this service. There will be 4 sessions available per week. Contact Barry Kroll, District Webmaster at barrykroll@aol.com to set up your appointment.

NEED A SPEAKER FOR YOUR CLUB?

We maintain a list of speakers who are willing to speak at one of your club meetings either in person or via Zoom. The information is on the District website at www.njrotary.org. You will find the link to speaker information on the right side of the website or you can access it [HERE](#). You may wish to bookmark this for the future.

UPCOMING EVENTS:



Monday, October 11 (Columbus Day) – End Hunger 3.6 Golf Outing – End Hunger 3.6 aims to provide meals to food insecure New Jersey residents. This charity event, to be held at Berkshire Valley Golf Course in Oak Ridge, will feature a dinner, contests, prizes, silent auction and a 50/50. You can bet it will be a fun day supporting a worthy cause. This outing is open to all Rotarians who are welcomed to bring family, friends, colleagues, and customers to enjoy a day on the greens. Advance registration required. Please sign-up [HERE](#).

CAN'T ATTEND THE GOLF OUTING, BUT WANT TO SUPPORT END HUNGER 3.6?

In conjunction with the End Hunger 3.6 Golf Outing, there will be an online auction that opens four days prior to the golf. To access the Auction, please click the link below. The Auction will open on Thursday, October 7 at 12 pm & will remain open until 7 pm on Monday, October 11. The Auction will also be live at Portofino's, after the End Hunger 3.6 Golf Outing. [CLICK HERE](#) to access the online auction. All funds raised will be used to address food insecurity. Thank you for your continued support.

Thursday, October 21 at 6 pm – District Finance Committee – The District Finance Committee will meet online via Zoom. Committee Members are encouraged to sign-up [HERE](#). Advance Registration Required. For more information, contact Chair Larry Wefferling at larry@wefferlingcpa.com.

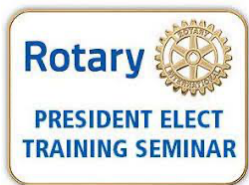
Tuesday, October 26 at 6 pm – Rotary District Foundation Committee (RDFC) – Will meet in-person at the Park Avenue Club, 184 Florham Park, NJ 07932. Committee members must register in advance by **Tuesday, October 19** to attend. Please register by emailing PDG Mike Hart at drmhart@yahoo.com.

Thursday, October 28 at 6 pm – President’s Council – Club President’s and Assistant Governors please mark your calendars now for an in-person President’s Council. We’ll focus on fundraising at this training session which will be held at the Park Avenue Club, 184 Park Ave, Florham Park. More information to follow... **PLEASE SAVE THE DATE.**

Friday, October 29 at 12 noon – Membership Lunch & Learn District 7475 sponsors a monthly Lunch and Learn focusing on membership development the last Friday of each month at 12 noon. Advance registration is required - click [HERE](#) to register. In the month of October, Membership Lunch and Learn will focus on how to use the Learning Center at Rotary International. Take advantage of a wealth of training materials designed to help you learn new skills and become more successful in what you do. You can access information based upon your position in Rotary i.e. Club President, Club Secretary, Rotary member, etc., or you can access training information based upon topic. Topics include: membership development, fundraising, projects, grants, starting a new Rotary club, awards, public relations, Rotaract, Interact and more. Learn about Rotary club activities that support strategic goals. Find best practices and resources to ensure your club succeeds.



Monday, November 8 at 7 pm – Assistant Governor’s Meeting – This online meeting is for Assistant Governor’s and select invited District Leaders. Advance registration required. Sign-up online [HERE](#).




SAVE THE DATE! - PRESIDENT ELECT TRAINING SEMINAR (aka “PETS”)

PETS is in-person this Rotary year! ... PETS will be held at the Marriott in Hanover, NJ on March 24-26. PETS training is **MANDATORY** for all Presidents-Elect, even if you are currently a President with a 2-year term or were President in the past. Plus, we’ll have two online Pre-PETS sessions on March 1 and March 8. Please save these dates now and future information will be sent out.

That’s all for this week!

Be well + stay safe as we **Serve to Change Lives together!**

Shelby 

Shelby Rhodes
Rotary District Governor, 2021-22
Rotary International District 7475
E: Shelby@HartmannRhodes.com
C: 973-945-9494

**AGENDA
DISTRICT LEADERSHIP MEETING
September 26, 2021**

Call to Order

Pledge of Allegiance: AG Elroy Darden

Prayer: Branchville RC President Ellie Benz

District Governor Shelby's Opening Remarks

Meeting/Learning start: Governor Shelby

Officers, Executives and Committee Reports

- Immediate Past District Governors' Report
- Governor's Aide Marc Lebowitz
- Rotary District Foundation Committee (RDFC)
- Nominating Committee
- Public Image Committee
- Youth Exchange

Kindred Organizations Reports

- Gift of Life New Jersey
- Rotary District 7475 Foundation, Inc.

Learning Center Training: District Trainer PDG Frank Geraghty.

DEI: DEI Assessment, Classification Assessment and Prospective Member Exercise: Governor Shelby

Rotary Direct Giving: Governor Shelby

2021-22 Membership contest description and wheel spin: District Membership Chair PDG Barry Kroll

District Governor Shelby's Closing Remarks

Four-Way Test: Blairstown RC President Bob Law

Rotary



Report for September 28, 2021

Dr. M. Ann Walko-PDG

Participated in a Changing of the Guard ceremony for Branchburg Club

Attended by Zoom-RI Presidential Changing of the Guard

Worked with Human Trafficking group-continued work from the conference

Worked with editing material-Beyond Borders Newsletter for Zone 32-28

Working with RI and Zone Foundation-Gala 2022-more information forthcoming

Recognized members of the Leadership Team for Service during 2020-21

Attended Foundation Meetings re: PDG Bob Button as chair-serve as a trustee

Completed work with PDG Ray Freaney-the India Covid project which raised a little over \$19,000

Completed the Refugee Program with the NJ Veterans Network in conjunction with the Fanwood-Scotch Plains Club

Attended all meetings for the Fanwood-Scotch Plains Club Re: new project-Town-Wide Garage Sale to raise money for our projects

Voted in as a Trustee for the Restoration of the Frazee House-a NJ Historical Project under the guidance of the Fanwood-Scotch Plains Club

Volunteer for Mobile Meals to assist in preparing food for delivery to requested homes with other Rotarians

Volunteer for El Centro Hispanoamericano in Plainfield-food bank for those in need with other Rotarians

Serve on the By-laws committee for the 7475 District Foundation

Signed up for the New Member Orientation Session

Attended the Rotary Means Business with another district covering the New York/New Jersey area

Attending Lunch and Learn Sessions hosted by Barry Kroll

Attended the NARCAN Training session

Responded to all requests from RI-paperwork completed

Prepared 81 Presidents packages containing a letter of commendation and certificate of appreciation for serving during this COVID year

Cleaning out all paperwork not needed and referencing material that might be useful for the future

Finalized all work for the Commemorative Journal which is now at the printer for final proofing and which will be sent out to all those who registered for the conference. PDG Ann thanks all for their patience-this was a difficult project.

Attended a luncheon meeting for the Watchung Warren Club-congratulating them on establishing an EarlyAct program

Attended a dinner meeting -Rotary Club of the Mendhams—presented Communications Award earned

Mailed plaque to the Montgomery-Rocky Hill Club-Communications Award earned

Participated -Installation Dinner for Fanwood-Scotch Plains Club-presented the EMT of the Year Award-received a beautiful plaque for work as DG

Attended a luncheon meeting-Branchville Club-presented Communications Award earned and presented a military medal to the past president for her service-distributed Rotary bags and magnets

Attended a luncheon meeting for the Nutley Club-presented Communications Award earned-presented a Thank you bag to outgoing president and one to the incoming president-distributed bags and magnets

Attended a luncheon meeting for the Summit-New Providence Club-presented Communications Award earned-distributed magnets and 2022 calendars for members-outgoing president received a Commendation letter and certification

Installed officers for the Plainfield Rotary Club-prepared ceremony and certificates



Balance Sheet

As of August 31, 2021
Aug 31, 21

ASSETS

Current Assets

Checking/Savings

Fulton Bank	104,325.42
Fulton Bank MM	160,003.15
Kearney Grant 3619	30,122.75
Investors Bank (Rotary Means Bu	1,279.29
Kearny Bank OP 2466	77,360.33
TD Bank GRANT ACCOUNT	1,231.44

Total Checking/Savings 374,322.38

Accounts Receivable

Accounts Receivable 34,975.00

Total Accounts Receivable 34,975.00

Other Current Assets

District Confrence Deposit 5,000.00

Total Other Current Assets 5,000.00

Total Current Assets 414,297.38

TOTAL ASSETS 414,297.38

LIABILITIES & EQUITY

Liabilities

Current Liabilities

Other Current Liabilities

Accts Payable

District Trainings 9,000.00

International Convention 12,500.00

PETS 35,875.00

Total Accts Payable 57,375.00

Total Other Current Liabilities 57,375.00

Total Current Liabilities 57,375.00

Total Liabilities 57,375.00

Equity

Unrestricted Net Assets 147,597.59

Net Income 209,324.79

Total Equity 356,922.38

TOTAL LIABILITIES & EQUITY 414,297.38

						TOTAL	
Ordinary Income/Expense						Jul - Aug 21	\$ Over Budget
Income							
Rotary International							
RI Grant							
Total Rotary International						66,472.00	66,472.00
Affinity Programs						66,472.00	66,472.00
Dues						0.00	0.00
Governor's Stipend						97,350.00	1,000.00
Investments						11,044.00	95,000.00
Interest-Savings						11,044.00	11,044.00
Total Investments						50.37	0.00
PETS						50.37	0.00
Total Income						10,125.00	1,000.00
Expense						185,041.37	117,044.00
Administration							67,997.37
District Website & Data Base						3,086.00	2,850.00
Interactive Online Services						65.11	236.00
Merchant Service Fees						0.00	-1,000.00
RI Dues						0.00	600.00
Supplies and Postage						0.00	3,000.00
Tax Filing						0.00	250.00
Total Administration						3,151.11	7,700.00
Awards and Recognition						0.00	1,000.00
Bank Service Charge						5.00	-1,000.00
Conference/Convention/Assembly							
District Conference							
Postage						55.00	55.00
Venue						0.00	2,000.00
District Conference - Other						0.00	18,000.00
Total District Conference						55.00	18,000.00
Rotary International Convention						0.00	-15,945.00
Zone 28-32 7 Officers						0.00	4,000.00
Total Conference/Convention/Assembly						0.00	-12,000.00
Contingency 2%						55.00	-31,945.00
District Leadership						0.00	2,611.98
27 Assistant Governors						0.00	6,480.00
District Governor						0.00	-6,480.00
District Governor Elect						0.00	-16,044.00
District Governor ND						0.00	8,350.00
District Governor Nominee						0.00	-8,350.00
Governor's Aide						0.00	1,000.00
ImmediatePast District Governor						0.00	3,600.00
Secretary						0.00	500.00
						0.00	600.00
						0.00	250.00
						0.00	-250.00

Sgt-at-Arms	0.00	250.00	-250.00	0.00	0.00	0.00	0.00	250.00	-250.00
Treasurer	0.00	250.00	-250.00	0.00	0.00	0.00	0.00	250.00	-250.00
Vice District Governor	0.00	600.00	-600.00	0.00	0.00	0.00	0.00	600.00	-600.00
Total District Leadership	0.00	37,924.00	-37,924.00	0.00	0.00	0.00	0.00	37,924.00	-37,924.00
District Meetings									
College of Governors	0.00	2,250.00	-2,250.00	0.00	0.00	0.00	0.00	2,250.00	-2,250.00
District Meetings - Other	0.00	6,000.00	-6,000.00	0.00	0.00	0.00	0.00	6,000.00	-6,000.00
Total District Meetings	0.00	8,250.00	-8,250.00	0.00	0.00	0.00	0.00	8,250.00	-8,250.00
District Projects									
Humanitarian Mission	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total District Projects	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Fundraising	0.00	5,000.00	-5,000.00	0.00	0.00	0.00	0.00	5,000.00	-5,000.00
Global Scholar	0.00			-30,000.00	0.00	0.00	-30,000.00		
Marketing & Promotion	0.00	5,000.00	-5,000.00	0.00	0.00	0.00	0.00	5,000.00	-5,000.00
Office Expense	0.00			328.40		0.00	328.40		
Training									
AG Training	0.00	1,225.00	-1,225.00	0.00	0.00	0.00	0.00	1,225.00	-1,225.00
District Assembly	0.00	7,000.00	-7,000.00	0.00	0.00	0.00	0.00	7,000.00	-7,000.00
Foundation	0.00			177.07		0.00	177.07		
Foundation/MOU Workshops	0.00	3,500.00	-3,500.00	0.00	0.00	0.00	0.00	3,500.00	-3,500.00
Membership	0.00	5,000.00	-5,000.00	0.00	0.00	0.00	0.00	5,000.00	-5,000.00
PETS	0.00	10,000.00	-10,000.00	0.00	0.00	0.00	0.00	10,000.00	-10,000.00
Rotary Leadership Institute	0.00	5,000.00	-5,000.00	0.00	0.00	0.00	0.00	5,000.00	-5,000.00
Total Training	0.00	31,725.00	-31,725.00	177.07	0.00	177.07	177.07	31,725.00	-31,547.93
Total Expense	2,065.11	133,210.98	-131,145.87	-26,348.53	0.00	-26,348.53	-24,283.42	133,210.98	-157,494.40
Net Ordinary Income	115,053.60	-16,166.98	131,220.58	94,271.19	0.00	94,271.19	209,324.79	-16,166.98	225,491.77
Net Income	115,053.60	-16,166.98	131,220.58	94,271.19	0.00	94,271.19	209,324.79	-16,166.98	225,491.77

Subject: DISTRICT 7475 ROTARY CLUBS IN FLUS

Date: Monday, September 20, 2021 at 8:28:25 PM Eastern Daylight Time

From: Marc Lebowitz

To: Mark Hartmann, MS

FOR THE PAST MONTH WE'VE BEEN WORKING WITH 2 GROUPS OF ROTARY CLUBS TRYING TO MERGE.

GOING THROUGH ROTARY INTERNATIONAL PAPERWORK TO MERGE TAKES TIME - BOTH GROUPS SHOULD HAVE THEIR MERGER COMPLETED IN THE NEXT FEW WEEKS.

WE ARE ALSO WORKING WITH ONE CLUB WHOSE DUES ARE LATE. THIS SHOULD ALSO BE RESOLVED IN THE NEXT 3 WEEKS.

I THINK IT IS IMPORTANT FOR EVERYONE TO UNDERSTAND THAT THE MERGER OF CLUBS INVOLVES ROTARY INTERNATIONAL PAPERWORK, NOT DISTRICT PAPERWORK. THE DISTRICT REVIEWS THE CLUBS PAPERWORK TO RI AND SIGNS OFF ON THE MERGER.

THE DISTRICT DOES NOT FORCE A CLUB TO MERGE NOR DOES THE DISTRICT STOP TWO CLUBS WHO WANT TO MERGE.

YOU CANNOT BLAME THE DISTRICT FOR THE PAPERWORK AND TIME INVOLVED FOR A MERGER TO BE COMPLETED - IT'S EITHER ERRORS OR OMISSIONS BY THE MERGING CLUBS OR OUR RI CLUB SUPPORT OFFICERS ARE INUNDATED WITH WORK.

MARC LEBOWITZ
GOVERNOR'S AIDE

Foundation Committee Report to District Leadership Meeting

District 7475 Foundation Chair PDG Dr. D. Michael Hart

Governor Shelby Rhodes

September 28, 2021

Information dated 9-22-21 (changes daily)

Club Goals: 100% of clubs have entered Annual Giving club goals into Rotary.org:
Total of Club Goals: \$147,995.00
100% of clubs have entered Polio Club Giving Goals into Rotary.org
Total of Club Polio Goals: \$61,847.00

Giving: To 9-22-21:
Annual Giving: \$19,760.00
Polio giving: \$11,565
Other: \$4,200
Endowment: \$1,370
Total: \$36,895

Non- giving clubs: 44 out of 80
Presidents: 6 gave; 74 did not
Foundation Chairs: 14 gave; 66 did not

Clubs Achieving over 100% of Giving Goals: 5 out of 80
Bloomfield
E Club
Montclair
Morris Plains
Skylands

Eat, Drink and Share Foundation Fundraiser:

Cancelled this year; spring fundraiser instead.

EREY: Only one third of Rotarians in our District donate- we can do better
We are asking every club to include \$100 for each person in dues statement
for annual giving. Optional line on the statement.
We are all Rotarians; this is our Charity.

DDF Planning:

Start with \$131,347.24 plus *approx. \$15,000.00 = \$146,347.24

\$66,472.00	District Grants
\$50,000.00	Global Grants- 7 at \$7,000 plus one at \$1,000
\$15,000.00	Global Scholar
None	Peace Scholar
\$5,000.00	Roll Over to John for Sam's year
\$9,875.24	Donations to Polio & Peace Centers

\$146,347.24 Total

*Approximately another \$15,000 DDF in October from the Endowment earnings

Fundraising:

Joe Nastus, Chair. Food Truck fundraiser April 30, 2022
At Joe Horner's Manville Airport

District Grants Status:

\$66,472 available for Club District Grants.
66 clubs qualified; 59 clubs applied for 63 grants totaling \$66,472
1 club has completed their grant and has been reimbursed
The funds from the clubs which do not complete their projects
will be moved to End Hunger 3.6
District grant for End Hunger 3.6 is \$4,968

Disaster Relief Grant

\$25,000 is available from RI.
Mike applied with Shelby's consent.
Grant was approved and funds will be transferred soon.
We will apply the proceeds to End Hunger 3.6
Many people were displaced from their homes during Hurricane Ida.

Scalable Grants

This is a new Grant program from RI for successful programs which have the ability to be scaled up to larger programs. Ellsworth Havens is considering submitting an application for End Hunger 3.6 to this program.
The Grant from RI is up to \$2 million to be paid out over a 3-to-5-year period.
The End Hunger 3.6 program has been doubling every year for the past 4 years and is now up to 1 million meals per year.
Since Rotarians pack the meal packets, it qualifies as a hand- on project.
Many clubs are using their District Grant funds to participate in this program.
New Jersey has many "food insecure" areas, so this benefits the people in our District.

Global Grants Status

Grants in Draft stage: 1 Mozambique- lost the host club. Looking for another
Authorization required: none
Submitted and awaiting approval: 2:
Fanwood- SP - Nicaragua - Sanitation; Blairstown - Water- Peru
Approved but Unpaid by RI: 2
Grants Partially Paid: 2
Reports Overdue: 3 – see below
Grants Fully Paid: 21

Policy: District will match club contributions for Global Grants at a rate of 1:1
up to a maximum of \$7,000 DDF per grant; for the host or international club only.
The district does not match contributions for a grant which we are not a primary sponsor.

Global Grants Overdue Reports:

Branchburg - Nepal- Earthquake
Caldwell- Diabetes in DR- on the verge of completing!
Bangladesh- project delayed by Covid

Group Study Exchange and Vocational Exchanges: were cancelled due to COVID,
and many countries having travel restrictions.

Major Giving: Jeannie Tsukamoto is chair

Paul Harris Society: PDG Bob Zeglarski, Chair is calling Society Members

PH Fellows this year: 28
Members of Society: 53

Peace Fellows: Pia Reich is Chair.

Applications are available for next year.
These are free to your club, and free to the district.
It is a masters Program. They require 3 years of working experience before applying.
Please look for candidates to recommend.

Polio Giving: PDG Julie Ann Juliano has stepped down

100% of Club Goals are in = \$65,941

Polio Giving to 9-22-21 \$11,565.00

The RI World Fund matches District DDF Polio giving by 50%
The Gates Foundation matches any giving 2:1
Therefore, \$100 becomes \$150, then Gates adds \$300 = \$450.

Global Scholarships:

Anthony Giachin graduated from West Point and is studying at Cambridge University in London.

RI shut down for a few weeks, and was reorganizing their financing, so it was difficult to arrange financing, but Pia was able to arrange it through persistence. Thanks, Pia!

APPENDIX I – Reference Page

1. Changes to the Foundation formula:
 - a. Polio Match dropped to 50%; then Gates x 2, so \$100 becomes \$450
 - b. GG's no match on club or individual donations
 - c. District 7475 has a 1:1 match to club donations up to a maximum of \$7,000 DDF
 - c. GG World Fund 80% Match of DDF, so \$7,000 gets \$5,600
 - d. Donations to SHARE will have 5% subtracted first for operating expenses;
so, 95% of Giving is counted.
47.5% to World Fund; 47.5% to DDF
 - e. 5-year limit on rollover of DDF; use it or lose it. Sam should empty out DDF.
2. Allocation of DDF for Shelby's year: Total \$137,337.39 plus endowment earnings
 - a. District Grants \$66,472
 - b. Global Grants \$49,000- 7 grants at \$7,000 each, plus one for \$1,000
 - c. Scholarship \$15,000
 - d. Donation to a Foundation Programs: Polio; Peace Scholars; Rotary Peace Centers; Disaster Response Fund; Endowment Fund; World Fund
3. End of Year Polio donation: DDF 20% = \$23,667.00 Requested by RI
4. Polio Plus Society- Mike Karu, chair
 - a. \$100 – pin & certificate
 - b. \$80 Added first year – 18 means "Life" in Hebrew- get a coin
 - c. Send checks to Mike Karu:
Checks made out to: The Rotary Foundation- Polio Plus
333 Eisenhower Parkway
Livingston, NJ, 07039-1722
 - d. He is willing to give club programs by Zoom
5. Global Scholarships- Pia Reich, Chair
 - a. Deadline: May 1, 2020
 - b. Scholars: Outgoing - Incoming Global Scholar from Australia –
 - c. Emily Rice, studying Peace and Conflict resolution at Columbia Univ
6. John Shockley's year:
 - a. Annual Giving 2019-20: \$267,576
 - b. DDF available: \$133,788
 - c. District Grants Available: \$66,894
7. Sam Maddali's year:
 - a. Annual Giving collected 2020-21: \$196,899
 - b. DDF available: \$98,449.50
 - c. District grant fund available: \$49,224.75

8. District Grants
 - a. Every Qualified club eligible to apply
 - b. Must attend Foundation Seminar to Qualify
 - c. Maximum of \$1,000 per club
 - d. Reimbursement program
 - e. Must have club dues paid to receive reimbursement
 - f. Hands-on activity required – no checks of gift cards

APPENDIX II - List of Foundation Dates:

Oct 2, Lunch & Learn: Awards; Global Scholar Australian Global Scholar
Oct 13, Wed, 6 pm, Committee meeting- Park Ave Club (Date change?) ask Mark H.
November is Foundation Month
Feb 2, 7 pm, Zoom, Committee meeting
Feb 26 Polio Dinner- Somerville Elks
Apr 13, Wed, 6 pm, Committee mtg – Park Ave Club
April 30 Foundation event at Manville Airport

APPENDIX III - This Year's Foundation Team:

District Rotary Foundation Chair

PDG Dr D. Michael Hart, Westfield
553 Highland Ave, Westfield, NJ, 07090
H 908-654-7384, C 908-294-2108

3-year term ends 6-30-24

drmhart@yahoo.com preferred form of contact

Annual Giving & Paul Harris Society

PDG Bob Zeglarski, Roselle- Roselle Park
162 Tournament Drive, Monroe Township, NJ 08831
Cell: (908) 868-2798

robertzeaglarski@aol.com

Cadre TRF

DGND Sam Maddali, Roxbury
10 Chapin Road, Bernardsville, NJ 07924
B 973-741-6155, C 973-945-5165

Rphsam@gmail.com

Grants Chair- District and Global Grants

Pamela Singh, Watchung- Warren
299 Blairsden Court, Somerset, NJ 08873

pamelarsingh@gmail.com

H: 908-226-1463, C: 908-202-6608 (daughter's voice)

Fundraising- Chair Joe Nastus, Greater New Brunswick
44 Polhemus Terrace, Whippany, NJ 07981
908-227-1464
jnastus150@gmail.com

International Service Chair - PDG Tulsi Maharjan, Branchburg 3 Year term ends 6-30-24
404 Whiton Rd, Neshanic Station, NJ, 08853
H 908-369-1386, C 908-458-7712
trmaharjan@gmail.com

Major Gifts and Endowment Fund Chair, Jeannie Tsukamoto, Madison
48 Lake Trail East, Morristown, NJ, 07960
973-410-0723
atsukamoto@msn.com

Paul Harris Society – see Annual Giving- PDG Bob Zeglarski

Polio Plus Committee Chair - open

Polio Plus Society- Mike Karu, CPA/CFF, West Orange
Cell: 973-865-8394; Home: 973-325-1867, B: 973- 992-9400 ext. 321
mkaru@ljcpa.com
Levine Jacobs & Company, L.L.C. Partner/Member of the Firm
333 Eisenhower Parkway, Livingston, NJ 07039-1722

Scholarship and Peace Fellow Chair - Eva “Pia” Reich, Morristown
C 973-801-7032
evapiareich@gmail.com ,

Stewardship Chair- Louis Cain, Branchburg
109 Omni Ct., Neshanic Station, NJ, 08853
H: 908-369-6946, C: 908-875-3098
Lcainjr@aol.com

September Report- Nominating Committee

As of September 19th, the district has three nominees for District Governor Nominee Designee (DGND.) Nominations will close on September 30th. Then the District Governor will appoint a committee of past presidents two deep from each of the six regions within the district. That means a primary and alternate representative in each of the regions. Also, a PDG will be appointed by the District Governor to serve as vice chair of the Nominating Committee.

Once the committee membership is appointed, the work of interviewing the candidates and making a final selection can proceed. It is hoped that the work will be completed before Thanksgiving making this year's process the earliest in our brief four-year history. Adding the DGND to the Governor Chain early is an important goal this year.

After the selection is made, the committee will have one more task, probably to be completed in the winter. The committee has been charged with expanding the number of primary representatives in the nominating process. Any suggested change will have to go to the Bylaws (Manual of Procedures) Committee for review at the District Training Assembly in the Spring.

I will be happy to address any questions. Thank you.

PUBLIC IMAGE REPORT TUESDAY SEPTEMBER 21 2021

I don't have a lot to report. I am the sole chair for this committee after agreeing to be cochair. I am encouraged by my committee, which is small. We are preparing for our huddle zoom on September 29th.

I will have more to report next month.

COMMITTEE:

Yuriko Bullock - Trenton

Angelo Faillace – Phillipsburg

Polia Quiles – Branchville

Steve Shannon – Madison

Scott Marum – Morristown

Youth Exchange Report

The Eastern State Student Exchange program (ESSEX) is planning to restart the youth exchange in the Fall of next year. If our District wishes to participate, we must now identify clubs who will support the exchange. ESSEX wants feedback from us by October 20. That means clubs who are interested must identify possible outbound students, identify host families who will take inbound students and determine whether their school district will accept a student from another country for the 2022-2023 school year. The cost for Essex to administer the program is \$250 per student. Any club who wishes to consider this program should contact me at JRA188@aol.com right away. If you have questions, you can call me at 201-213-6382.

Thank you.

Jim Allison, PDG, District Youth Exchange Chair

Dear District Leaders,

GOL of NJ is planning its Annual Meeting for Thursday, November 18 at 7:00 PM. The meeting will be on Zoom, so you will not have to travel and it's FREE! Please tell your club members to mark their calendars now. The program will include a review of the little hearts we have saved and the plans we are making to save more.

During this Covid pandemic it has been difficult to safely help children with heart defects, and it has been even more difficult to keep all of our Rotary friends informed of what we are doing. So please ask all of your club members to seize this opportunity to learn about our work and find out how they can help us give more kids a chance to live happy, healthy lives.

Register now and then pass this message on to your club members so they can register as well.

If your club would like to present their annual contribution to the Gift of Life at this event, please send me a note at JRA188@aol.com so I can add your club's name to the agenda.

REGISTRATION

To register click on the link below:

https://us02web.zoom.us/meeting/register/tZltceGrqDktHNYg1xdWI3qM_KW0V9kCrggy

After you have registered, you will receive a confirmation email containing information about how to join the meeting.

Thank you for supporting the Gift of Life. See you on Zoom, November 18.

Jim Allison, PDG, Chair GOL NJ

Rotary District 7475 Foundation, Inc
Leadership Meeting Report
9/28/2021

Overview: The District 7475 Foundation, Inc is a separate corporation that continues to serve the needs of the District and the clubs by providing the tax advantages of a 501c3 and expeditiously collecting, managing and distributing money for charitable purposes.

This allows us to expand our reach with outside organizations and businesses that agree with our causes. A primary example is an End Hunger initiative run by Keller Williams Real Estate that raised over \$23,000 for that cause.

District Wide Initiatives: Among our other initiatives: (dollar numbers are approximate)

Annual District Wide Raffle: This year \$58,000 returned to clubs and \$58,000 given out as prizes

Calendar Raffle for End Hunger: \$18,000 to End hunger and \$18,000 in prizes

India Oxygen: \$19,000 to India to buy generators

Community Hope for Veterans: \$8,600 for assorted items for on premises Lyons veterans.

Welcome Home Wishlist: \$19,000 for veterans who have graduated from Lyons and now going to independent living.

We are also collecting funds for **Read4Life, and Haiti Earthquake Relief**

End Hunger remains a very active initiative.

Sponsorships: Ellsworth Havens has approached 5 banks, requesting donations of \$25,000 each to support 4 End Hunger Packing Events in the Spring of 2022.

The End Hunger Golf Outing on October 11th. That event will be at the Berkshire Valley Golf Club. See the District Website for the link to sign up or be a sponsor.

The End Hunger Calendar Raffle continues to have monthly drawings. Approximately \$18,000 is being given out in prizes. This raffle is closed. The charity money has already been allocated to End Hunger initiatives.

Rotary Youth Leadership Activity will be reinstated this year. Barry Kroll advises that it will be held the 2nd week in June.

Disaster Relief: Over the years we see many disasters worldwide. Clubs often approach us to have a common place for donations. Ray Freaney has aligned us with Disaster USA, Inc., which is a Rotary Affiliate the often gives supplies rather than just money to relief situations. That allows us to track the proper use of the money. *It is one avenue, but not the only one we use.* Ray has now proposed a Calendar Raffle for Disaster Relief. That raffle will replace the Hunger Calendar Raffle. It is anticipated that it will take place in March of 2022. Historically we have raised money on a self funding basis for disasters. This initiative would be to create a fund where we might be able to provide matching money for any given disaster.

Hurricane Ida: Ray has been contacted by a Rotarian staffed Disaster Relief Team from Maryland. They will travel to your location to help recover. A similar team is in place in Bergen County. The interest is in whether they can help us now and also whether we should consider such a team in our own district.

District Wide Raffle: It is anticipated that this raffle will once again be drawn during the last week of May 2022. This is a complex event to run, and Bob Button will be looking for assistance in distributing tickets and managing the incoming money from the clubs.

Club Projects: We continue to be an asset for your club when you might need a 501c3 to get a corporate sponsorship, or need to use our Raffle license for one of your events, or to take a donation from an outside source. A recent success was the Dover Wine Raffle. The wine was donated and they used our raffle license to raise about \$3,400 for their charities in a very short time. (The Lake Hopatcong Club borrowed their idea and raised over \$8,100!).

Ameritex Clothing Bins: The District 7475 Foundation Inc was asked by PDG Michael Hart to discontinue involvement with this initiative. The Board of Trustees agreed and voted to turn its management over to the Westfield Rotary Club.

District Website: Information on the District 7475 Foundation can be found on the District Website under Foundations and at our own website: rotary7475foundation.org.

To ask our Foundation to manage the financial side of your project, you fill out a project request form that is available on the District Website. Send it to us and, once received, we try to vote to accept it within 4 days. In most cases, you as the submitter are the project manager. We handle the money and give advice as necessary.

Thank you Rotarians!

Robert Button, PDG

Board Chair, District 7475 Foundation Inc.

Nota Bene: I am easiest to reach by email: rbttn@aol.com

Yes, I/we have made a commitment to
The Rotary Foundation Endowment.

Name(s) to appear on recognition materials and/or for future publication.

Address

City, state or province, country, and postal code

Email

Optional:

Rotary ID # Rotary club name

Rotary district

Date(s) of birth

Home, business, and/or mobile phone

The spending portion of the gift shall be:

- ☐ Unrestricted (World Fund)
- ☐ Directed to:
- ☐ SHARE (World Fund and District Designated Fund)
 - ☐ Rotary Peace Centers
 - ☐ One or more areas of focus:
 - ☐ Peacebuilding and conflict prevention
 - ☐ Disease prevention and treatment
 - ☐ Water, sanitation and hygiene
 - ☐ Maternal and child health
 - ☐ Basic education and literacy
 - ☐ Community economic development

- ☐ Please contact me at the phone number above to discuss gift designation preferences.

The bequest will be funded by (some gift options are not available in all regions):

- ☐ Will or living trust
- ☐ Retirement plan beneficiary designation
- ☐ Life insurance beneficiary designation
- ☐ Donor advised fund
- ☐ Charitable remainder trust
- ☐ Other (please describe)

The gift to The Rotary Foundation is expected to be:

US\$ (The dollar amount is used for recognition purposes; if no amount is selected we will default to Level One.)

Recognition options:

For those who commit \$10,000 or more, one recognition pin per person will be automatically shipped to a home address.

My/our recognition preferences are noted below:

- ☐ I/we *do not* wish to receive an engraved crystal (for commitments of \$25,000 or more).
- ☐ I/we *would* like a pendant with the pin(s).
- ☐ Tell me more about special naming opportunities.
- ☐ Send all recognition materials to this address instead:

- ☐ I/we have another request. (Please describe)

Signature Date

Signature Date

Please return this form and any supporting documents you wish to share that name Rotary as beneficiary. Contact information for your nearest Rotary office is featured on the back cover.

rotary.org/legacy

World Headquarters

Rotary International
One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
Tel. +1-847-866-3100
Email: legacy@rotary.org

Brazil Office

Rotary International
Condomínio Comercial Casa das Caldeiras
Av. Francisco Matarazzo, 1752, conj. 1421
Água Branca
São Paulo, SP
05001-200 Brazil
Tel. +55-11-3217-2630
Email: fr.brasil@rotary.org

Europe/Africa Office

Rotary International
Witikonstrasse 15
CH-8032 Zurich, Switzerland
Tel. +41-44-387-71-11
Email: eao@rotary.org

Japan Office

Rotary International
Mita Kokusai Building 24F
Mita 1 Chome 4-28
Minato-ku, Tokyo 108-0073
Japan
Tel. +81-3-5439-5800
Email: rijpntrf@rotary.org

Korea Office

Rotary International
Rm. 705, 70, Gukjegeumyung-ro
Yeongdeungpo-gu, Seoul 07333
Korea
Tel. +82-2-783-3077
Email: rikorea@rotary.org

South Asia Office

Rotary International
Pullman/Novotel Commercial Tower
First Floor, Asset No. 2,
Hospitality District
Aerocity (Near IGI Airport)
New Delhi 110037
India
Tel. +91-11-42250101 to 105
Email: risao@rotary.org

South Pacific and Philippines Office

Rotary International
P.O. Box 1415
Parramatta, NSW 2124
Tel. +61-2-8894-9800
Email: risppo@rotary.org

Great Britain and Ireland Office

Rotary Foundation of the United Kingdom
Kinwarton Road
Alcester
Warwickshire B49 6PB
England
Tel. +01789 765411
Email: rfuk@rotarygbi.org



Your Rotary Legacy

Doing Good in the World
beyond your lifetime

Rotary's tomorrow depends on what we do today.

You can be an important part of the Foundation's next century of serving humanity by including a gift to Rotary's Endowment in your estate plan.

Your gift will be carefully stewarded to provide funding for the programs you know and love, year after year. The principal is never spent and available earnings are used to make a lasting difference in people's lives. A gift from your estate to the Endowment will provide ongoing financial support, just as your annual contributions do today.

Join the many Rotarians and friends who have made commitments to improving and enriching lives around the globe by creating your personal legacy with The Rotary Foundation.

How to include Rotary in your estate plan

One of the most popular ways to include Rotary in an estate plan is through a will or codicil. Whichever method works best for you, please remember to use the official legal name, **The Rotary Foundation of Rotary International**, unless one of the following names applies in the region where you live:

- ◆ The Rotary Foundation (Canada)
- ◆ Rotary Foundation (India)
- ◆ Public Interest Incorporated Foundation — Rotary Foundation Japan
- ◆ Rotary Foundation of the United Kingdom

Here are a few examples for your adviser to consider:

- ◆ For a general gift of a certain percentage or portion of your estate: "I give to The Rotary Foundation of Rotary International one-fourth of my estate."
- ◆ For a gift of a specific asset: "I give 500 shares of [name] stock to The Rotary Foundation of Rotary International."
- ◆ For a contingent bequest, which takes effect only when certain conditions are met: "In the event my spouse does not survive me, I give to The Rotary Foundation of Rotary International the remainder of my estate."
- ◆ For a residual bequest, which directs the disposition of all or a portion of whatever remains after all other required amounts are paid: "I give the rest, residue, and remainder of my estate to The Rotary Foundation of Rotary International."

As always, remember to consult independent tax and legal advisers before making any charitable gift.

How your legacy carries on

A gift to **Endowment-World Fund** allows the Trustees to direct support where it is most needed around the world. A gift to **Endowment-SHARE** allows your Rotary district to direct a portion of the spending along with a portion going to World Fund. You may also support one or more of the **areas of focus**. Current trustee policy is to direct undesignated gifts of \$10,000 or more to World Fund.

We may share your name as one of the growing number of Rotarians and friends who are providing future gifts to the Foundation, unless you request anonymity. Rest assured the details and amount of your commitment will always remain confidential.

Personalizing your fund

You can personalize your legacy with a separately identified fund that bears your name, your family's name, or the name of a loved one, and with larger gifts it may be possible to more-narrowly direct the use of the funds to specific programs or regions. The minimum amount to establish a named fund is \$25,000.

Let Rotary recognize you

The Rotary Foundation Trustees are pleased to share their gratitude and offer membership in special societies.



Legacy Society

Individuals and couples who have substantiated a future gift of \$1 million or more to the Endowment are listed in Rotary's annual report and are invited to exclusive Rotary International and Foundation events. **Legacy Society** members also receive special recognition items and all the benefits provided to Bequest Society members.

Bequest Society

Those who have made commitments for future gifts of \$10,000 to The Rotary Foundation are invited to join the **Bequest Society**. Each level of giving includes the benefits offered to Bequest Society members at the preceding levels.

- ◆ \$500,000 — Special seating and registration benefits at the Rotary International Convention
- ◆ \$250,000 — Posthumous induction into the Arch Klumph Society
- ◆ \$100,000 — Customized Rotary's Promise crystal
- ◆ \$50,000 — Separate named endowed funds directed to two areas of focus or districts
- ◆ \$25,000 — Rotary's Promise crystal and named endowed fund
- ◆ \$10,000 — Bequest Society pin and an exclusive art piece suitable for framing

Rotary is pleased to confer **Benefactor** status on those who have made commitments for future gifts to the Endowment in their estate plans or outright gifts of \$1,000 to the Endowment. Benefactors receive a badge suitable for electronic media, a certificate, and a special insignia to wear with a Rotary pin.

Clubs with 100-percent member support of the Endowment are eligible to request a **Rotary's Promise Club** electronic certificate. Qualifying support may be a commitment for a future gift to The Rotary Foundation in an estate plan or an outright gift of \$1,000 or more to the Endowment.

FINDING NEW CLUB MEMBERS



Clubs around the world approach member recruitment in very different ways. Customize this exercise to make it appropriate in your region.

Asking your fellow members about people they know in the community who would be assets to the club is an important step in membership growth. Prospective members are likely to rely on the experiences and opinions of their friends, family, or colleagues when considering joining an organization like Rotary.

Encourage others to invite prospective members to club meetings, service projects, and events so they can see how your club helps the community and provides opportunities to form connections and friendships. It may take a few conversations or several visits for prospective members to get a full understanding of Rotary and how they could benefit from membership. It's important to allow that time to make sure that it's a good fit for everyone involved.



Two out of every three prospective members who are referred by a Rotarian join Rotary. If a prospect can't join your club but is interested in Rotary, help Rotary grow by **referring him or her** to another club.

OUTCOME

Identifying prospective members and actively recruiting them will help your club:

- Develop a pool of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get new members who are well vetted and more likely to stay

GETTING ORGANIZED

Set aside time for members to complete the worksheet on page 3.3 at one of your club meetings. Typically, this exercise works best at the beginning of a Rotary year, when annual membership goals have just been set, or in March, when the incoming president is planning for the next Rotary year.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.



Prospective members can also find their way to your club by inquiring about membership on [Rotary.org](https://www.rotary.org). To see a list of potential members in your area who have been reviewed by your district and assigned to your club for consideration, sign in to My Rotary and head over to the **Club Administration** page.

GETTING STARTED

Ready to start? Here's how.

Step 1: Ask members to complete the Identifying Prospective Members Worksheet

Explain the purpose of this exercise and how it relates to the assessments your club has already completed. Distribute the worksheet to club members and ask them to complete it. Compile the information from the worksheets and maintain a master list of prospects.

Step 2: Make an action plan

Compile the names that were circled on the worksheets and make a plan to invite those people to a club meeting, service project, or social event. If you conducted classification and diversity assessments, refer to the list of groups you found to be underrepresented in your club. Your plan should specify who you'll invite, to what, who will invite them, and how they'll do so.

Step 3: Invite prospective members to a club event

Invite the people you identified as qualified prospective members to attend an upcoming service project or meeting. Or host a special event where they can meet club members and learn about the club in a casual atmosphere. Make them feel welcome by having the club president or another leader greet them personally.

Step 4: Follow through

- Ask members who invited prospective members to contact their guests and report back on their interest in joining.
- Keep the worksheets and your compiled list for future recruiting efforts.
- Regularly go to My Rotary's Club Administration area to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and qualified for membership but not a good fit for your club, [refer them](#) to another club.

Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Diversifying Your Club: A Member Diversity Assessment](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members who might qualify for membership in your club. It's not necessary to know whether they are ready to join Rotary.

Once you've listed your contacts, circle the names of any you feel would be a good fit for your club.

Member name: _____ Date: _____

Professional Contacts

Consider your supervisor, current and former colleagues, acquaintances from professional associations, and people you have done business with recently.

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Service Contacts

Consider neighbors, community leaders, and acquaintances who have volunteered with you on Rotary or non-Rotary events or service projects.

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Community Contacts

- Physicians
- Dentists
- Real estate agents
- Financial managers or planners
- Religious leaders
- Lawyers
- Business consultants
- Accountants
- Veterinarians
- Internet technology consultants
- Public relations professionals
- Entrepreneurs
- Nonprofit professionals
- School administrators
- University professors
- Civic leaders
- Social workers
- Psychologists
- Sales executives

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Rotary Contacts

Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are those who have experienced Rotary through various programs, including:

- Interact
- Rotaract
- Rotary Youth Exchange
- New Generations Service Exchange
- Rotary Youth Leadership Awards (RYLA)
- Rotary Peace Fellowships
- Rotary Scholarships
- Vocational training teams
- Ambassadorial Scholarships
- Grants for University Teachers
- Group Study Exchange
- Rotary Volunteers

Name: _____ Occupation: _____

Name: _____ Occupation: _____

REPRESENTING YOUR COMMUNITY'S PROFESSIONS



In Rotary, members' classifications refer to their occupations, professional expertise, and training. Rotary clubs aim to include members from a number of classifications because bringing together professionals from different fields and industries increases a club's capacity to serve its community as well as giving its members an opportunity to learn more about others in the community. To maximize your impact, strive for professional diversity that represents the professions held in your community. Because business activities and terminology vary from community to community, Rotary doesn't maintain a comprehensive list of classifications. Be open to nontraditional professions that bring new skills and perspectives to your club.

OUTCOME

Conduct this classification assessment and act on its results to:

- **Grow and diversify your club's membership.**

You will clearly see which professions are represented in your club and what skills and expertise it's missing. Each gap you identify presents an opportunity to target your recruitment efforts.

- **Make the best use of members' expertise and skills.**

Your club's collective knowledge and talent can help it make a more significant impact in your community. Once you recognize the expertise and skills your members have acquired through their professions, you'll be better able to use them to the club's advantage. Recognizing members for their unique talents will yield a number of benefits, too. When members' professional skills are put to good use:

- Retention rates are higher, because members feel useful and valued
- Clubs are better equipped to conduct successful service projects
- Members are motivated to excel
- Members have more opportunities to grow professionally and network
- Clubs are more attractive to prospective members

GETTING ORGANIZED

To conduct a successful classification assessment, you'll need a dedicated group of members. It could be your membership committee, or you can organize a classification assessment team.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time. Steps 3 and 4 could take 1-2 weeks.

GETTING STARTED

Ready to start? Here's how.

Step 1: Gather member data

Have all club members complete the Occupation and Professional Expertise Survey on page 1.4. You can ask them to take it during a club meeting or turn it into an online survey that they can complete in their own time. Explain the purpose of the classification assessment and make sure that members understand the benefits of having a good mix of professions represented in your club.

Step 2: Evaluate the data

Analyze the completed Occupation and Professional Expertise Surveys and fill in the Classification Audit on page 1.6 with the professions of your club's members.

Step 3: Collect data on your community

Gather data about the professional makeup of your community. You can research local employment statistics online or ask your chamber of commerce or another local business association for information.

Next, fill in the Classification Audit table with the top five professions in your community, along with the percentage of community members in those professions.

Step 4: Analyze the data

Use the results of the Classification Audit to determine which professions should be added to your club to achieve a balanced membership. Finally, answer questions on the Classification Worksheet on page 1.7.

Step 5: Present the results

Present your results and recommended actions at a club meeting, including:

- How seeking members from underrepresented classifications can guide your efforts to identify potential members
- How the skills you've discovered among your current members can be used to strengthen your club and enhance service projects

Get member input on your recommended actions, gather consensus, and adjust your action plan accordingly.

Step 6: Take action

The final step is to take action based on your results. Identify qualified prospective members according to the gaps you found in your club's classifications. Ask current members to fill club roles or apply their skills to service projects to maximize the club's impact.

Interested in doing other assessments?

[Diversifying Your Club: A Member Diversity Assessment](#)

[Finding New Club Members: A Prospective Member Exercise](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



- ## 1.4

4. Do you have experience or expertise in the following areas? If so, please briefly explain.
- A. Leadership roles
 - B. Training/ teaching
 - C. Mentoring
 - D. Website design or management
 - E. Social media (blogging, Twitter, Facebook, LinkedIn, etc.)
 - F. Research or survey design
 - G. Fundraising
 - H. Public relations or marketing
 - I. Project management
 - J. Strategic planning
 - K. Other experience, expertise, or skills

CLASSIFICATION AUDIT

Professions represented in the club	Number of members in that profession	Percentage of membership
1. _____	_____	_____%
2. _____	_____	_____%
3. _____	_____	_____%
4. _____	_____	_____%
5. _____	_____	_____%
6. _____	_____	_____%
7. _____	_____	_____%
8. _____	_____	_____%
9. _____	_____	_____%
10. _____	_____	_____%
11. _____	_____	_____%
12. _____	_____	_____%

Top professions in the community	Percentage of community (if available)
1. _____	_____%
2. _____	_____%
3. _____	_____%
4. _____	_____%
5. _____	_____%

CLASSIFICATION WORKSHEET

1. What are the top classifications or professions in your community or the surrounding area that are either not represented or underrepresented in your club?
2. What challenges could your club face in filling the classification gaps you've identified?
3. Which of the classifications you listed in your response to question 1 should your club focus on filling? Why?

ACTION PLAN

Use your findings to create an action plan that addresses your club’s professional diversity.

Action	Person responsible	Time frame	Resources needed

DIVERSIFYING YOUR CLUB



Diversifying your club is not just about including a mix of people. It's also about working well together.

Diversity refers to inclusion of people from many groups. It is a source of innovation, as well as one of Rotary's core values. Having members with different backgrounds and viewpoints gives your club a broader understanding of the community, its problems, and possible solutions. Strive to have a group of members who offer the club diverse skills, talents, and experiences. If your club includes different ethnicities, ages, and cultures, as well as a good gender balance, it will have greater capacity to serve your community and communities around the world. Equally important is creating a culture of inclusion, where these differences are respected, supported, and valued.

OUTCOME

Conduct this diversity assessment and act on its results to:

- Raise your members' awareness of the diversity in your community
- Build member support for increasing diversity
- Diversify your club to better represent the working professionals in your community

GETTING ORGANIZED

Dedicate time in a series of club meetings to conducting each step of your member diversity assessment. Choose a facilitator (the membership committee chair, a committee member, or the club president) who is comfortable talking about diversity and passionate about the need for greater diversity in your club. Or, consider inviting a diversity and inclusion leader to talk to your club. This activity should involve all club members so that they all have a stake in the process. Greater inclusion will increase awareness and support for future action.



Note: Each of the steps can take a week or longer. When planning your assessment, be sure to allow enough time.

GETTING STARTED

Ready to start? Here's how.

Step 1: Discuss the benefits of having a diverse membership

Discuss the benefits of diversity with your club. Recognize and celebrate past successes, if appropriate. For example, highlight a service project or other club accomplishment that has been achieved through having members with diverse professional skills. Discuss your club's representation of professional field or classification, gender, age, ethnicity, and culture, and set goals.

Step 2: Collect information

Recap the diversity discussion from step 1 and reiterate the positive effects of having a more diverse membership.

Distribute the Member Diversity Worksheet. Split club members into four groups and instruct each group that they are to gather information from one of the following sources on their own time between this meeting and the next, completing what they can of the worksheet:

- **Group 1:** Get data on the demographics of the community from a local business association, such as the chamber of commerce
- **Group 2:** Gather information about the community's cultural and demographic composition from the local tourism bureau
- **Group 3:** Get socioeconomic statistics from local economic development experts or city government departments
- **Group 4:** Get the most recent census results, which may include information on the age, gender, and ethnic makeup of the area's residents and review them

Step 3: Discuss the findings within the groups

The following week, ask groups to meet to discuss their assignments, share what they completed on their worksheets, and compile their findings. Then have each group choose a spokesperson who will present its findings to the club at a future meeting.

Step 4: Report the results and discuss their implications

Have each group spend about five minutes presenting its findings at a club meeting. Facilitate a discussion about the reports and their relevance.

Does your Rotary club's membership reflect:

- The ages of the professional population in the community?
- The gender composition of the working professionals in the community?
- The ethnic and cultural diversity of the community?

Step 5: Develop a member diversity action plan

Find strategies to reach out to specific groups that were found to be underrepresented in your club. Document your plan and assign tasks to those on the membership committee, or ask other club members to help. Monitor progress toward your diversity goals and continually update club members.

Interested in doing other assessments?

[Representing Your Community's Professions: A Classification Assessment](#)

[Finding New Club Members: A Prospective Member Exercise](#)

[Improving Your Member Retention: Retention Assessment and Analysis](#)

[Enhancing the Club Experience: Member Satisfaction Survey](#)

[Understanding Why Members Leave: Exit Survey](#)



MEMBER DIVERSITY WORKSHEET

1. What sources did you consult in your search for data on your community's demographic composition?

2. What data did you find on:

Age:

Gender:

Ethnic background:

3. Does this data correspond to the current composition of working professionals in your community? Explain your evidence.
4. What fact or statistic did you find most interesting?
5. What surprised you most?
6. What surprised you least?

7. Are any demographic groups underrepresented in the club?

8. What can the club do to better represent working professionals in the community?

9. How can your findings be integrated into an action plan for membership development?



In conjunction with the End Hunger 3.6 Golf Outing, there will be an online auction that opens four days prior to the golf.

To access our Auction, please click the link below. The Auction will open on Thursday, October 7th at noon & will remain open until 7:00 pm on Monday, October 11. The Auction will also be live at Portofino's, after the End Hunger 3.6 Golf Outing.

[End Hunger Auction](#)

All funds raised will be used to address food insecurity. Thank you for your continued support.

End Hunger 3.6 Golf Committee

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ROTARY DISTRICT 7475 FOUNDATION, INC.