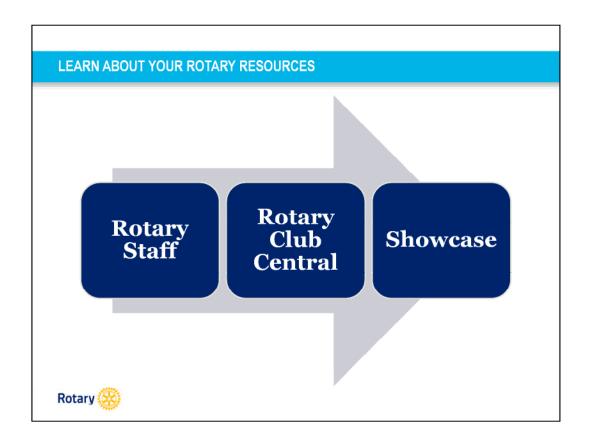


ROTARY ON THE WEB

District 7030 PETS Marni Nixon, Club & District Support Representative 23 April 2014



- -Welcome
- -Introduction
- -Thank you



-Objective: Learn about your Rotary resources

-[click] Rotary Staff

-[click] Rotary Club Central

-[click] Showcase



Rotary is a large organization. As club and district leaders, we want you to know that you have a direct line of contact into the organization, a team that is ready and willing to support you. So, meet your Club & District Support (CDS) team...

CDS IS YOUR PRIMARY CONTACT & RESOURCE

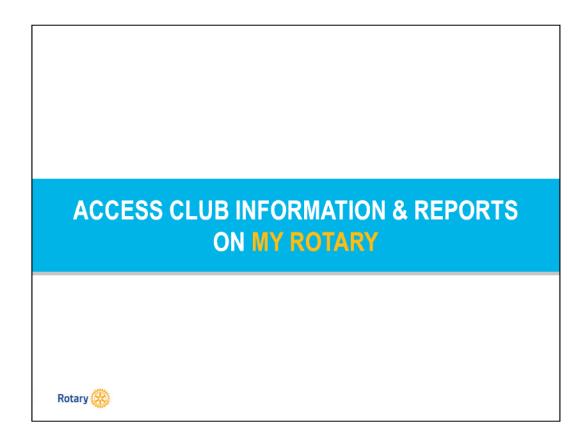


Marni Nixon marni.nixon@rotary.org 847-866-3188

Alicia Pijal-Avila alicia.pijal-avila@rotary.org 847-866-3487



- Alicia Pijal-Avila and Marni Nixon
- · What we do:
 - · Primary contact & resource for club and district leaders
 - Provide support on Rotary resources and tools (such as Rotary Club Central and My Rotary)
 - Assist with administrative procedures
 - Interpret Board policy and RI constitutional documents
 - · Connect you with other staff



Rotary is a large organization. As club and district leaders, we want you to know that you have a direct line of contact into the organization, a team that is ready and willing to support you. So, meet your Club & District Support (CDS) team...



So first, let's navigate to My Rotary...

· How many of you have already visited My Rotary?

As you likely know, our website has been updated. We have rotary.org, a public site, pictured here. This site tells our Rotary story to external audiences in a fresh, streamlined way, encouraging people to get to know Rotary and all of the good work we do worldwide.

Then we have My Rotary – the area of the site specifically designed for members. **[CLICK]** You can get to My Rotary by clicking on the link from the main rotary.org site. **[CLICK]** Or you can enter <u>www.rotary.org/myrotary</u> into your browser field.

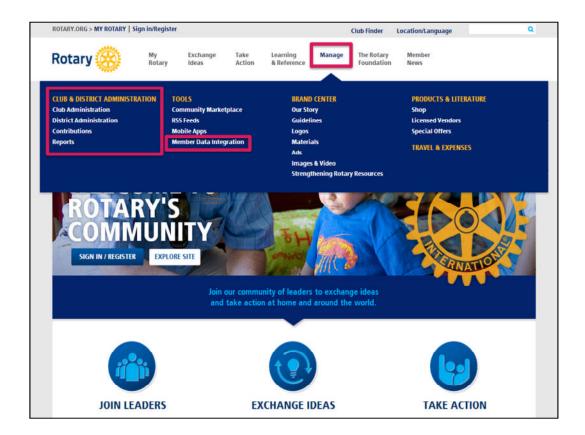
EL VIII	ACCOUNT REGISTRATION
	*Required
WELCOME T	FIRST NAME "
ROTARY'S	
COMMU	LAST NAME *
SIGN IN / REGISTER EXPLORE SITE	SIGN-IN EMAIL *
	ARE YOU 18 YEARS OLD OR OLDER? *
22.00	○ YES ○ NO
	CONTINUE

Register or Sign In to My Rotary

On this site, members will be better able to engage through their own customized experience based on their interests, and be able to conduct Rotary business more easily.

If you have not yet registered you just click on the Sign In/Register button **[CLICK]**, then Create an Account. **[CLICK]**

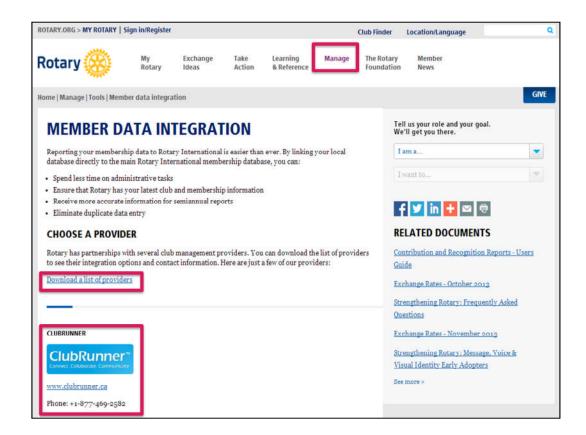
Once you enter your name and email, and confirm you're over 18, you'll receive an email with a link to set your password. If you do not receive the email within 24 hours just check your spam or junk folder.



Club information and reports are available to *current* club officers under the Manage section, the Club & District Administration. [click] For incoming officers, you will be able to access this information on 1 July. On this page you can view membership and contribution reports, as well as update club and member data.

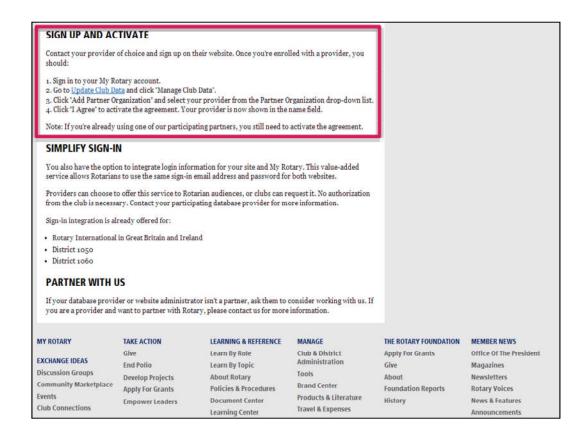
If your club is using a local database to update this data (such as ClubRunner), you want to make sure that your club has fully opted into the member data integration program. This is essential, otherwise, the data you enter into ClubRunner will not be transmitted to Rotary.

To find out more about this integration program, we stay under the Manage section and click on the Member Data Integration link [click].



This will take you to this screen. Here you can download a list of vendors (such as ClubRunner) and review the information that is integrated. You can also find contact information for Club Runner.

Scrolling down further....

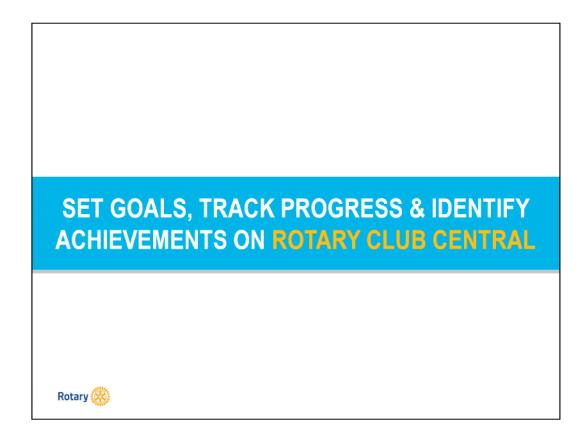


...you have instructions for how to sign up for this program and activate the integration. Once your club signs up, you will remain in the program until you choose to end your participation.

If you are not sure if your club is fully signed up, please contact ClubRunner directly.



-Questions?



Now we are going to talk about setting goals, tracking progress and identifying achievements on Rotary Club Central.



WHAT is Rotary Club Central:

Rotary Club Central is essentially about GOALS.

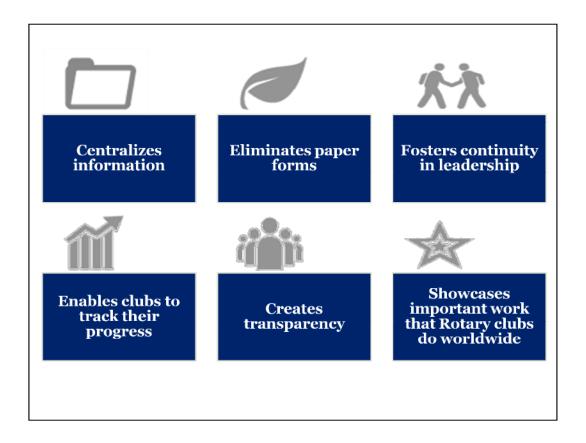
- How many of you have personal, professional, or financial goals?
- And how many think that having those goals makes you more focused, motivated, and successful?

I think we can all agree that Rotary clubs are the same way. That in order to be effective and impactful, it's important that a club know where it's been, where it's at currently, and where it wants to go. RC Central is a tool that helps clubs do three basic things:

- 1. Set goals
- 2. Track progress, and
- 3. Identify achievements (past and present)

*It is important to note that RCC is a <u>separate tool</u> inside My Rotary (or the Rotary website). You can only enter club goals using this tool, not through a local database vendor (such as ClubRunner).

*I also want to make it clear that Rotary Club Central is not the end goal. The end goal is more engaged members, better sustainable service, and greater support of our Foundation. Rotary Club Central is simply a means or a vehicle to help clubs think strategically, set realistic goals, and work toward



Here are some additional benefits to using RC Central to set goals:

[CLICK] It centralizes information. It provides access to all the data that was previously available from several reports.

[CLICK] It eliminates some paper. It replaces paper forms: membership, Rotary Foundation goals, & Planning Guide

[CLICK] It fosters continuity in leadership. Club leaders change annually, so by offering them the ability to see a history of goals and achievements, it creates continuity among leaders.

[CLICK] It enables clubs to track their progress. Club leaders can determine whether the goals they've set are realistic and make changes if needed.

[CLICK] It creates transparency. All members are able to see club goals.

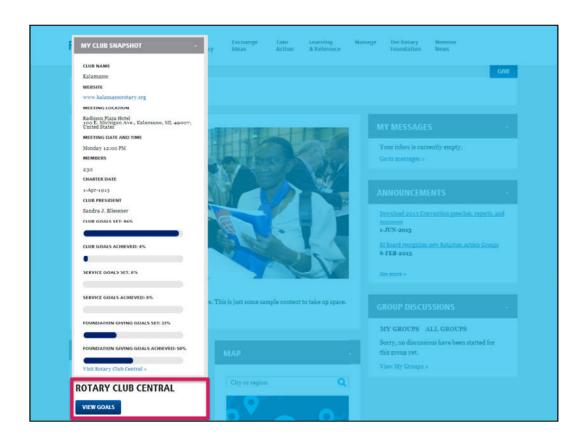
[CLICK] It showcases the important work that Rotary clubs do worldwide. Rotary has not had a vehicle for collecting information about the millions of service projects that Rotarians undertake. With RC Central, clubs can document the details of their projects, (number of volunteers and volunteer hours and a list of in-kind donations.) [CLICK]



<u>Immediate past, current and incoming leaders can enter club goals</u> for their term of service.

- · Club level:
 - President
 - Secretary
 - Treasurer
 - · Foundation chair
 - Membership chair
 - Executive secretary
- District level:
 - District governor
 - Assistant governors (only EDIT for clubs in their club group)
 - Committee chairs (that Rotary collects in our member database)
 - Executive secretary

^{*}EDIT function available to district leaders to HELP/SUPPORT.

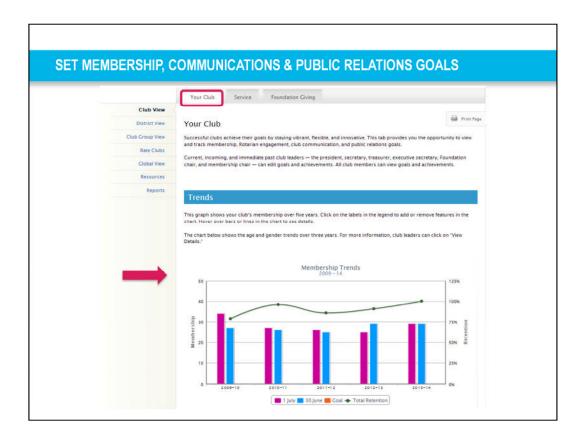


Now let's talk about how to get to Rotary Club Central. Once you sign on to your account, there are a few ways to access Rotary Club Central. The most direct way is from the "My Rotary" page where you will see "My Club Snapshot." [CLICK]

From here, you can see some of your club's details (such as meeting location, website, charter date, members, etc.), as well as information related to goals and progress.

At the bottom of the "club snapshot," you can click the button VIEW GOALS to enter Rotary Club Central [CLICK]

It can also be accessed from the "Project Lifecycle" page under Take Action, or "Club and District Administration" under Manage, two sections that we looked at earlier.

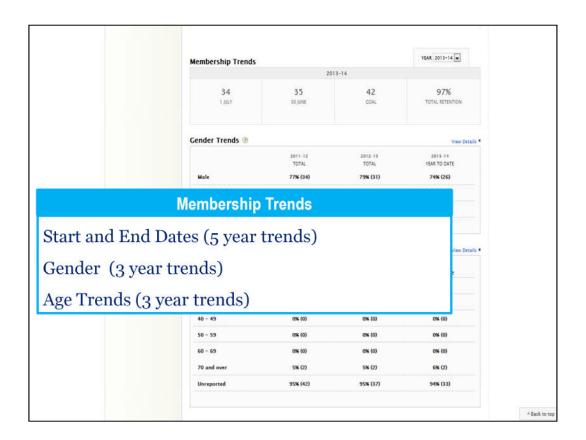


You will always begin on the Your Club tab [CLICK].

On this tab, you can <u>View membership</u>, <u>communications</u> & <u>public relations</u> goals for your club.

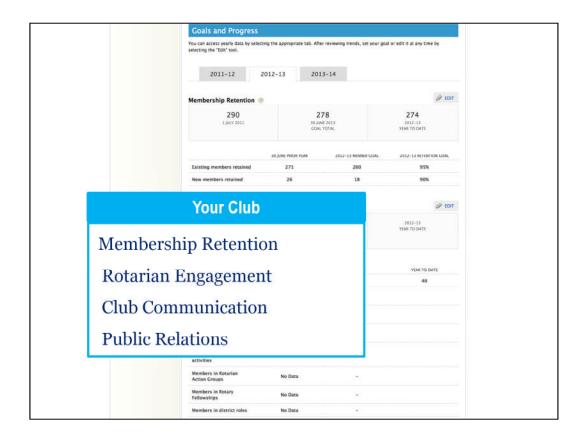
[CLICK] We start with the Trends section which shows your club's membership retention over the last five years.

Scrolling down further....



[click] ...we see more membership trends, starting with the membership start and end dates over the past 5 years, as well as gender and age trends over the last 3 years.

While these aren't goals, seeing the trends can help your club strive for a more balanced membership.



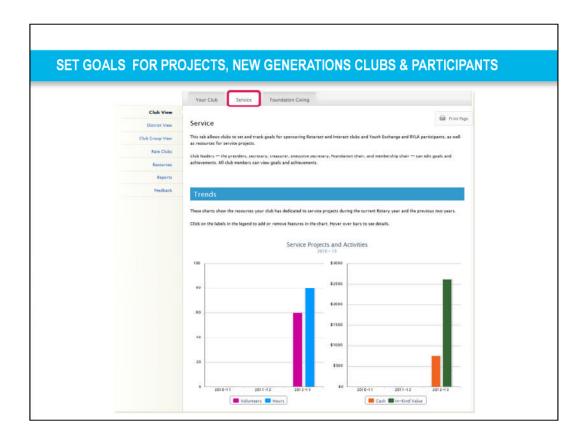
Scrolling down further, clubs can set four main goals in this section:

[CLICK]

- 1. Membership Retention
- 2. Rotarian Engagement
- 3. Club Communication &
- 4. Public Relations

Goal Examples:

- Members in club roles
- Retention of existing members and of new members
- Our club has a website

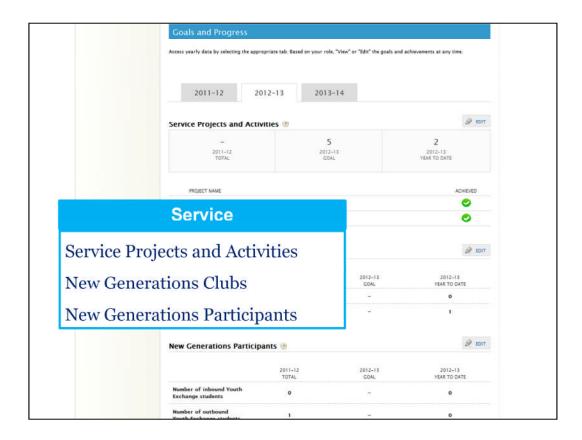


Under the Service tab, <u>View goals for projects</u>, <u>new generations clubs</u>, <u>and new generations participants</u>.

First, you're presented with a trend graph displaying a breakdown of the impact achieved from your club's service projects and activities over the last three years (based upon data reported in RC Central).

The four impact measures are:

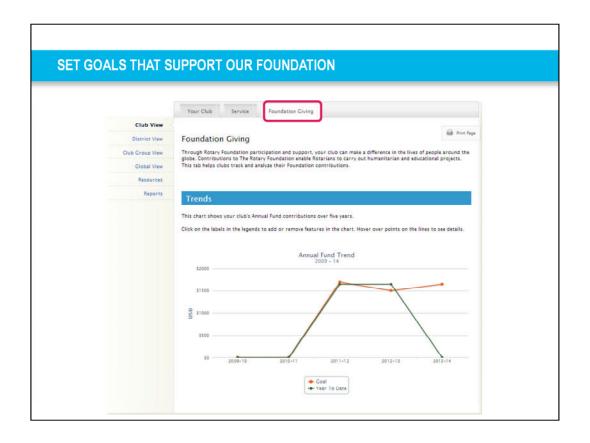
- 1. number of volunteers
- 2. total volunteer hours
- 3. cash donations, and
- 4. in-kind donations.



Scrolling down, there are three main goals here, which are:

[CLICK]

- 1. Service Projects and Activities
- 2. New Generations Clubs (which includes sponsoring Rotaract and Interact clubs), and
- 3. New Generations Participants (which covers Youth Exchange and RYLA).



And lastly, <u>View goals that support our Foundation</u> under the Foundation Giving tab.

This trend graph shows your club's Annual Fund goals and giving over the last 5 years.



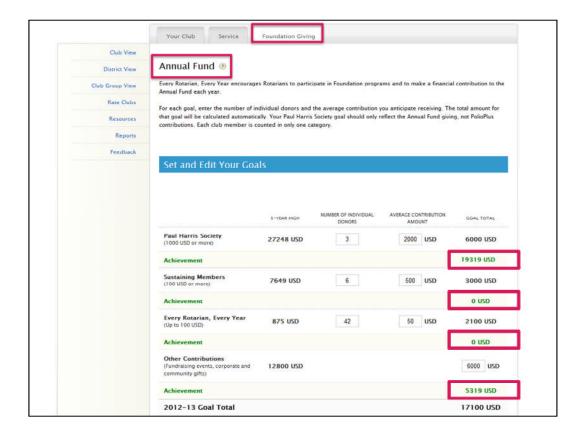
Below the trends are the three main goals for Foundation giving: **[CLICK]**

- 1. Annual Fund, includes Paul Harris Society, Sustaining Members, EREY, and other contributions.
- 2. PolioPlus.
- 3. Major Gifts and Endowment Fund, which includes Major Gifts, Bequest Society, and Benefactors.

EXAMPLE: entering a goal for Annual Fund

Club members will see "VIEW" which allows them to see the goals in more detail, but not add or change goals and achievements.

Anyone who can edit goals in that particular year will see an "EDIT" button. **[CLICK]** So as incoming officers, you'll want to click on the 2014-15 year tab and then you'll see the option to EDIT.



From the edit page, you have instructions to help you fill out the supporting goals.

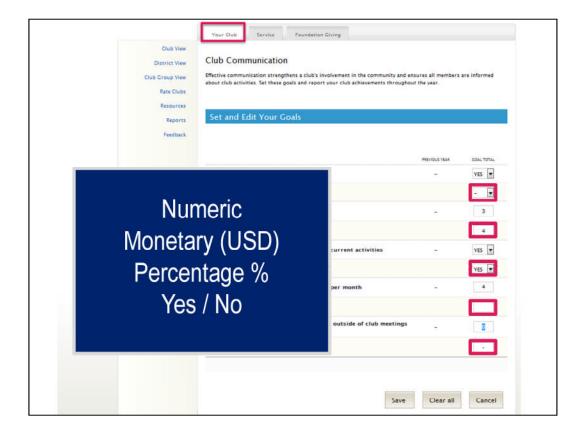
[CLICK] For even more information you can click the question mark next to Annual Fund.

So, for this goal you will have to estimate a number of individual donors and then the average contribution amount for each goal level (in USD). As you fill in these sub-totals, you will see them automatically added to reflect your club's total Annual Fund goal.

Remember: each member is counted only once and in their highest contribution level.

[CLICK]

Underneath each sub-goal is the club's achievement towards that goal. You'll notice this achievement information is automatically populated from Rotary International's database and does not need to be entered by the user. This is updated daily. **[CLICK]**

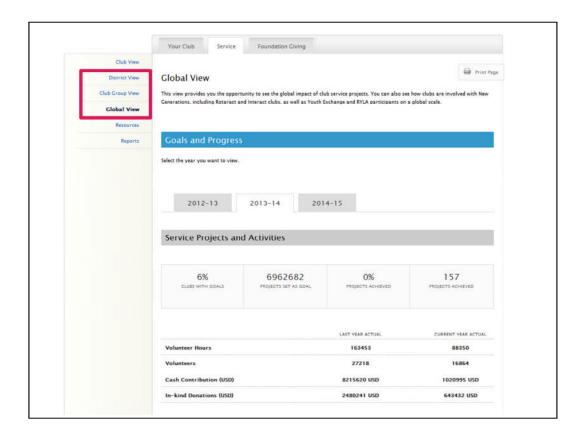


For another example we use the Club Communication goal, found on the Your Club tab.

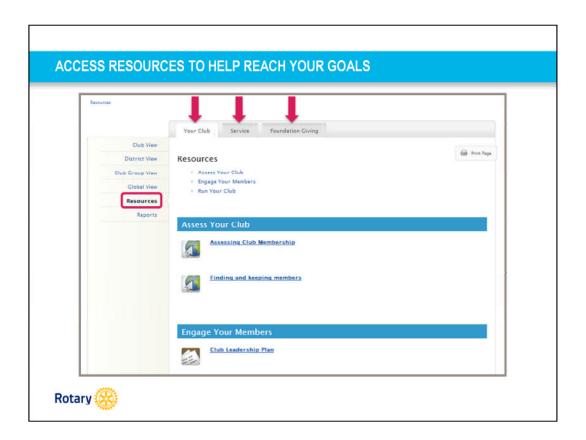
[CLICK] Unlike the previous example, these types of goals have self-reported achievements. Since Rotary does not collect this information, it is up to the officers to report their club's achievement at the end of the Rotary year (or they may choose to update achievements periodically throughout the year).

[CLICK] The goals in Rotary Club Central require one of the following:

- 1. Specific number goal (such as "the number of club assemblies conducted per year")
- 2. Monetary amount in USD (such as Foundation giving goals)
- 3. Percentage (such as % of existing or new members retained) OR
- 4. Value of YES or NO (such as "Our club has a strategic plan")



In addition to the Club View, all club members also have a club group view, district view, and global view where you can view aggregate goal and achievement totals at various levels.



Access resources to help clubs reach their goals.

All club members can access this resource area on the left-hand navigation bar

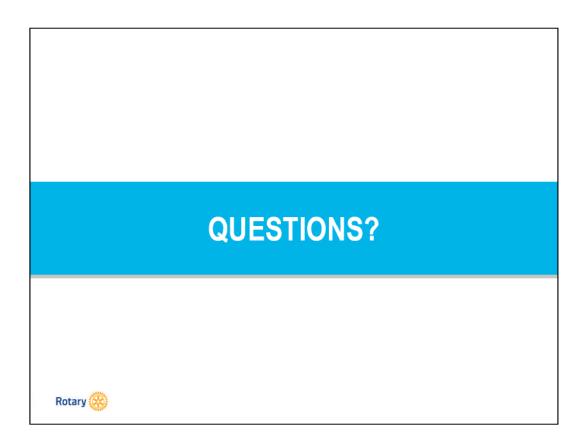
[CLICK] Clicking on any one of the three goal category tabs will give you access to publications, web pages, and even videos that can assist clubs in setting and achieving their goals.



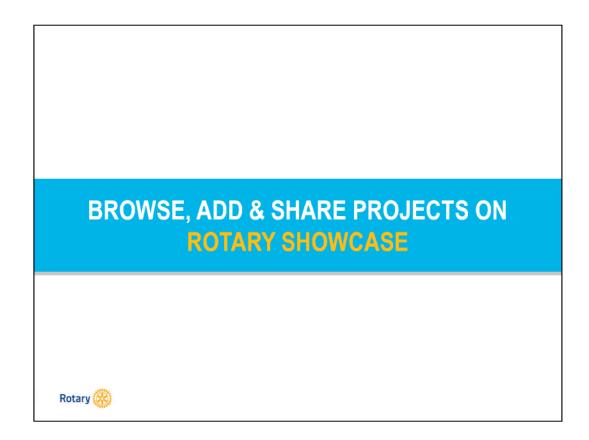
Similarly, you can also <u>Download reports to track progress and achievements.</u>

On the left side beneath Resources, we have Reports.

[CLICK] From here, you can view and download reports that are related to each of the three tabs. Some reports are only available to district level officers.



-Questions



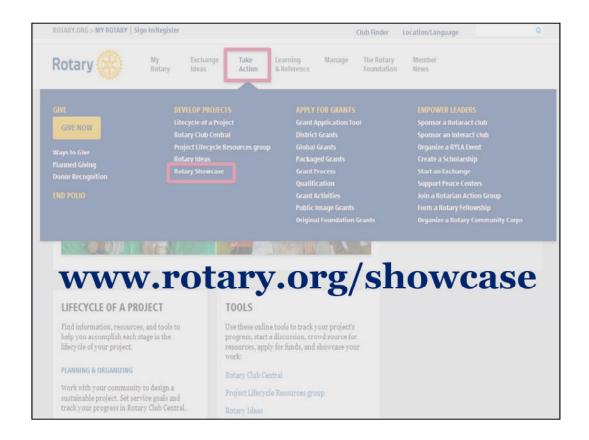
Now let's turn our attention to Rotary Showcase, another online tool to browse, add and share your club's projects.



What is Rotary Showcase?

It's an online tool where Rotarians and Rotaractors can share the good work their club is doing locally and globally.

We will see that clubs can use this tool to promote their own service projects, browse completed projects, and see the global impact of those projects in terms of volunteers, volunteer hours, and cash and in-kind contributions. This impact data is exactly why Rotary Showcase is an important tool. Not only does it showcase the great works that your clubs are doing, but it allows us to capture a better picture of the FULL scope of Rotary's impact around the world. Previously, this data was only available on projects funded by The Rotary Foundation.



Now that we know more about *what* Rotary Showcase is and *why* it's an important tool, let's talk about *who* can use it and *where* to find it.

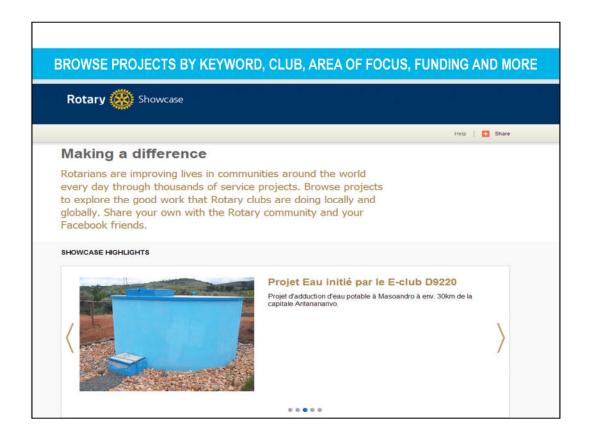
Rotary and Rotaract clubs can share their project success with the Rotary world and beyond. To get started, we're going to take a look at My Rotary (www.rotary.org/myrotary).

Anyone can browse the completed projects posted to Rotary Showcase, including friends, family, neighbors, co-workers, etc. that are not members of Rotary.

[CLICK] From My Rotary (<u>www.rotary.org/myrotary</u>), there is a link to access Showcase under Take Action → Develop Projects → Rotary Showcase.

[CLICK] Anyone can also access Showcase by typing www.rotary.org/showcase into their browser field.

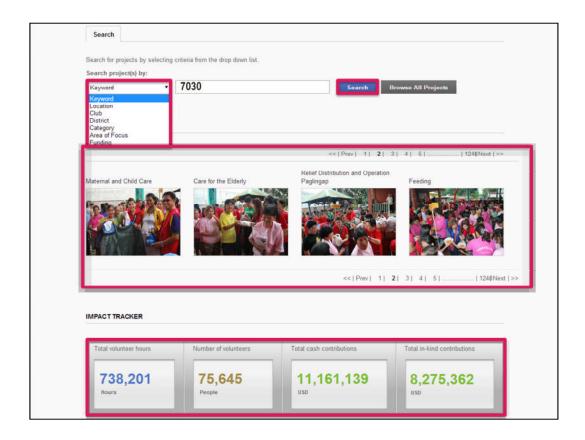
Anyone can view projects on Showcase, however, Rotary club members and Rotaract club presidents can share their own club's success by adding projects. When planning projects, clubs should consider how they will share their success as part of the lifecycle of the project.



Now let's see *how* you can actually utilize Rotary Showcase to browse, add and share projects.

The homepage of Rotary Showcase is made up of three main parts. The "add a project" link which I will discuss in a moment, Highlighted projects, and the full gallery of projects.

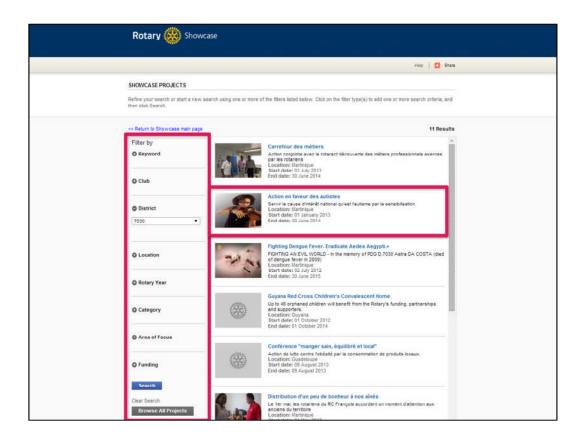
Highlighted projects are selected by staff and rotated monthly to feature work of Rotarians around the world. The projects are selected based on their images and impact data and represent a variety of categories as well as locations.



Beneath the highlighted projects **[click]** you will see the full gallery of projects that have been uploaded to Showcase. **[CLICK]**

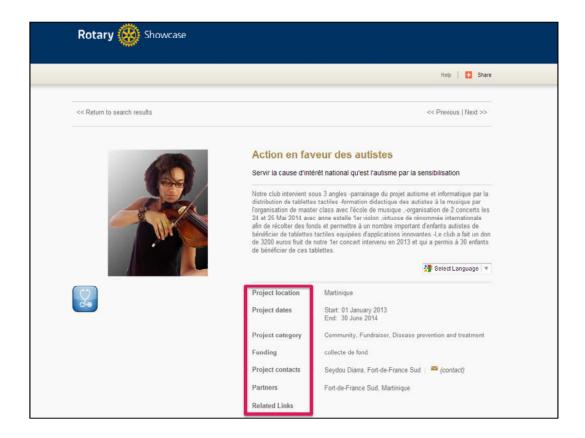
At the bottom you will see an "Impact Tracker." This is calculating the total projects of all projects entered into Showcase for the current Rotary year and tracks: volunteer hours, number of volunteers, cash contributions, and in-kind contributions.

[click] You can also search projects by a key word or other criteria, as well as Browse All Projects. **[click]** As an example let's search for all projects for district 7030.

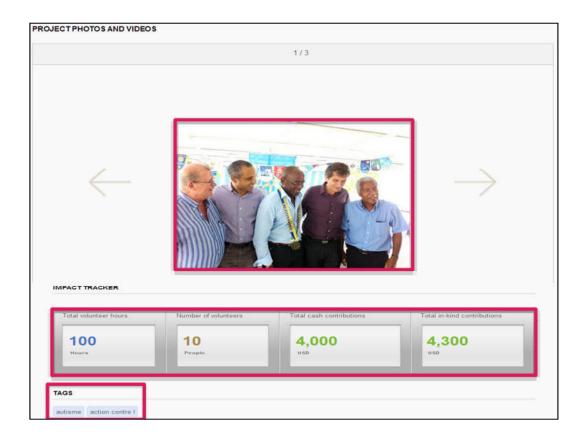


When you search by criteria or browse all projects, you are able to filter the projects based on Project Category, Location, and whether or not the project has Foundation Funding. **[CLICK]**

Once you find a project you are interested in, **[click]** click on the project title to view more details.



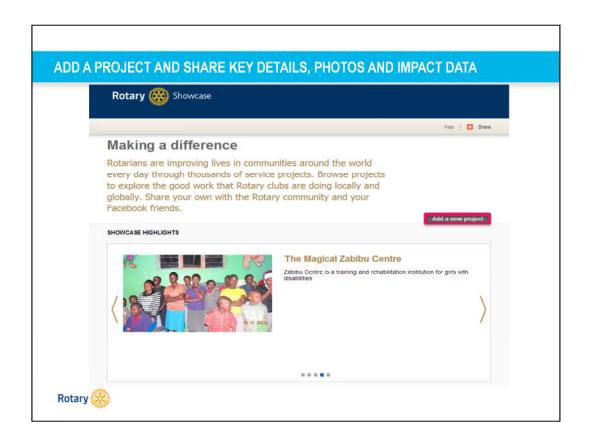
You will then see the project description, location, dates, contacts, etc.



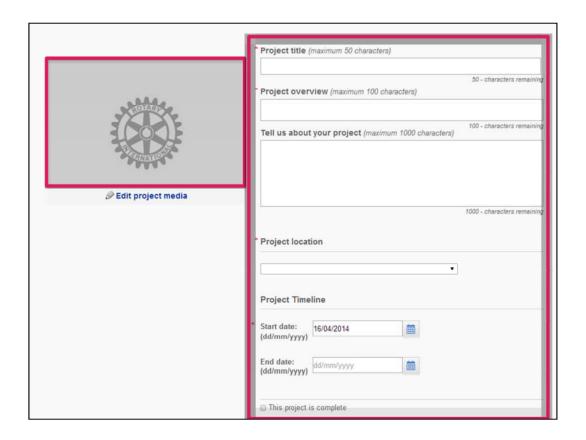
Scrolling down further, you will see photos and videos uploaded for the project. **[click]**

You will also see the total impact (volunteer hours, number of volunteers, cash contributions and in-kind contributions) for this particular project. [click]

Finally, you will see "tags" which help describe the project and allow it to be found more easily in a search. If you click on a specific tag, it will take you to the search results for all other projects with that tag.



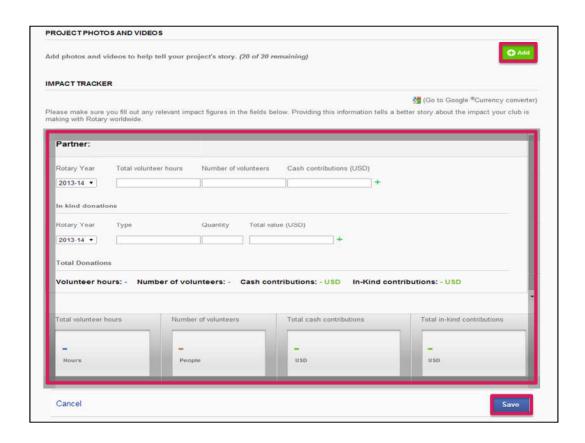
When you are signed on to your account on My Rotary and then go to Rotary Showcase, Rotary club members and Rotaract club presidents will have the option to **[click]** add their project to Rotary Showcase



Here, you can **[click]** add a project cover photo, **[click]** as well as add details about the project (title, description, location, timeline, etc.)

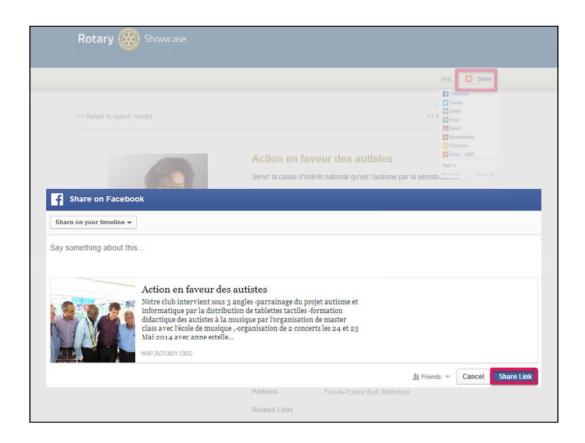
* Project category	
□ Community	☐ Fundraiser
☐ International	Polio
	□ Area of Focus Choose One ▼
New Generations	
Partners	
	♦ Add
Project contacts	
	⊕ Add
Related Links	O Alla
	◆ Add
Tags ?	·
	♦ Add
Funding	
Club Foundation	Rotary Grant
U Club Foundation	E Rotary Grant

Scrolling down further, you can also indicate the project category (such as one of the avenues of service or areas of focus), as well as add project partners, contacts, related links, tags and funding.



Finally, you can **[click]** add additional project photos and videos, as well as **[click]** enter impact data (volunteer hours, number of volunteers, cash contributions and in-kind contributions).

Of course, make sure to [click] SAVE your project.



Once you have added your project you will see the project details page. This is the page that any user can see when they click on your project from the homepage, Facebook or other social media site.

[CLICK] Users can view available project pictures and share this project. The Impact tracker shows the contributions for this specific project – which will be aggregated with other club/district projects in Rotary Club Central and aggregated on Rotary Showcase for worldwide impact of Rotary. It tracks volunteers, volunteer hours, and cash and in-kind contributions.

[CLICK] Sharing your project on Rotary Showcase increases the visibility of the work your club or district is undertaking locally and around the world. The site allows you to post your project on various other websites, further increasing the visibility of your work to the Rotary Family and beyond.

The simplest way to expand a project's visibility is to post your new project on your Facebook page. This posting can then not only be viewed on your Facebook page, but also shared with "friends" and reposted. The Share app, located in the upper right corner of the site (+ share), allows you to post your project on multiple other social media sites such as Twitter, Tumblr and Pinterest. Lastly, you can link to your project page from your club or district website as well as newsletters.

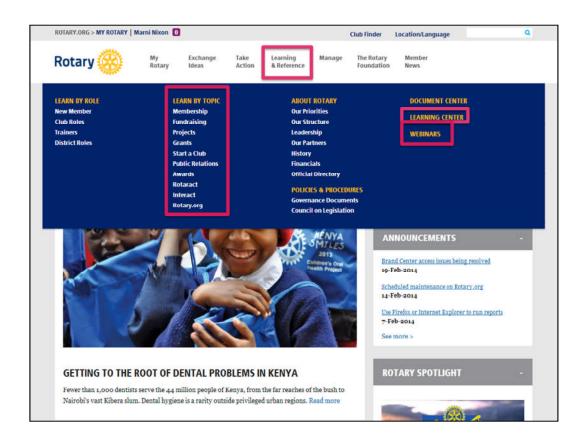
By sharing your work through Showcase you reach a broader audience to generate interest in your projects as well as club membership. Volunteering



Questions?



As you have seen, a wealth of information and tools are available to you. To continue exploring these resources, I want to encourage you to visit the Learning & Reference section on My Rotary.



[click] Here you will be able to learn by a particular topic of interest such as membership, Rotaract, grants, etc.

[click] You can also visit our Learning Center a take an online course on Rotary.org or Rotary Club Central, for example.

[click] Finally, you can register for upcoming webinars or listen to recordings of past webinars. Topics include social media, lifecycle of a service project, engaging young professionals and more.