

**Rotary**  
OMR PETS



# President-Elect Curriculum Materials



**BE THE INSPIRATION**

March 9-10, 2018

## **Session 1: Planning Your Year of Effective Leadership**

(55 Minutes)

### *Learning Objectives*

- 1. Understand the key leadership issues in operating a Rotary Club.*
- 2. Understand the importance of developing and using goal-setting and strategic thinking as proven, effective club management strategies.*

### **Your Role In Club Administration**

1. What is your role in the administration of your Rotary Club?
2. Have you reviewed your club's governing documents? Does your club have governing documents? Do you know when your club last reviewed its bylaws?
3. What reporting duties do all clubs have to Rotary International, the Rotary Foundation, and the District?
4. What may happen if your club fails to meet these reporting requirements?

## **Club Finances & Risk Management**

5. What is your role in your club's budget?
6. Is your club current with all local and federal taxes?
7. How does your club handle risk management?

## **Effective Meetings & Leading Rotarians**

8. How will you lead effective and engaging meetings? Do your plans include regular Club Assemblies?
9. What are some potential leadership challenges?
10. Does your club have some critical area that requires strong leadership? What are you doing now to address this need?

## **Goal Setting**

11. Have you set your club goals for the coming year?
12. How does your club determine which goals to set? Who will help you set your club's annual goals?
13. Once you set your club's annual goals, where should you record them?

14. Have you logged into Rotary Club Central? What can you do there?

15. Once you have set your annual goals, will you lead your club to create or update a strategic plan?

### **Other Resources**

16. Where else can you go if you have questions about how to run your club?

<b><u>Club Goal Setting</u></b>	<b><u>Club Budgets/Budgeting</u></b>
<b><u>Preparing YOUR Leadership Team</u></b>	<b><u>Club Assemblies</u></b>
<b><u>Member Access</u></b>	<b><u>Leading Meetings</u></b>
<b><u>Strategic Planning/Club Continuity</u></b>	

## Resources and References

Rotary Club Central: <http://www.rotary.org/ClubCentral> (requires login to MyRotary)

Rotary Governance documents: <https://www.rotary.org/myrotary/en/learning-reference/policies-procedures/governance-documents>

Rotary Council on Legislation: [www.rotary.org/col](http://www.rotary.org/col)

Rotary monthly theme calendar: <https://my.rotary.org/en/news-media/calendar>

Be a Vibrant Club: Your Club Leadership Plan:  
<https://www.rotary.org/myrotary/en/document/be-vibrant-club-your-club-leadership-plan-north-america-245en>

Rotary Brand Central: MYROTARY → MANAGE → BRANDCENTER Rotary Videos:  
<http://vimeopro.com/rotary/rotary-videos>

Rotary Images: <http://rotary.org/images>

*LEAD YOUR CLUB: President 2016-19 Edition*

## **Session 2: Making the Most of Rotary's Public Image**

(55 Minutes)

### *Learning Objectives*

- 1. Understand the purpose of implementing and utilizing a Image plan for your Rotary Club.*
- 2. Identify strategies for Public Image engagement on a continuing basis.*
- 3. Share proven ideas/ways for using Public Image.*
- 4. Collaborate with peers (here at PETS and at your club) on Public Image plans throughout the year.*
- 5. Understand the vital role that Public Image plays in member attraction and club project awareness.*

1. What does the term, “Rotary Public Image”, mean to you?
2. Why do we need and use public image?
3. How many clubs here today have a public image plan as a part of their club's strategic plan?
4. As your club's President, what is your role in establishing the use of public image?

### **Where to Find Rotary Public Image Tools**

5. Where can you as a club officer find detailed information about Rotary branding and public image tools?

6. what are some ways that your Rotary club could present a strong, unified image of Rotary?

7. Does your club have a Public Image Committee?

### **Engaging Traditional Media**

8. What are some traditional media outlets?

9. How can your club get public service announcements into these outlets?

### **Engaging Digital Media – Websites and Social Media**

10. What are some best practices for keeping your website up-to-date?

11. Is your club's website mobile-friendly, meaning that the website will resize itself so that it fits and works on a smart phone sized screen?

12. How does your club communicate on social media?



## **Telling Your Rotary Story**

13. Why did you join Rotary?

14. Why have you stayed with Rotary?

<b><u>Attracting Members</u></b>	<b><u>Community Awareness</u></b>
<b><u>Increase Foundation Gifts</u></b>	<b><u>Social Media Engagement</u></b>
<b><u>Traditional Media Engagement</u></b>	<b><u>Telling Your Rotary Story</u></b>
<b><u>Innovation</u></b>	<b><u>Other</u></b>

## References, Resources, Tools and Support

Public Relations: <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/public-relations>

Lead Your Club: Public Relations Committee Manual:  
<https://www.rotary.org/myrotary/en/document/lead-your-club-public-relations-committee>

Rotary Fact Sheet: <https://www.rotary.org/myrotary/en/document/rotary-glance>

This is Rotary brochure: <https://www.rotary.org/myrotary/en/document/rotary>

End Polio Now: <http://www.EndPolioNow.org>

Sample Proclamation: <https://www.rotary.org/myrotary/en/document/pr-sample-proclamation-world-rotary-day>

World Polio Day sample press release:  
<https://www.rotary.org/myrotary/en/document/world-polio-day-sample-press-release-template>

Make sure your site's ready for mobile-friendly Google search results:  
<https://support.google.com/adsense/answer/6196932?hl=en>

Club Public Image Committee District Public Image Committee

Rotary Public Image Coordinator (RPIC) and their assistants

## **Session 3: Engaging Your Community**

### **Community Engagement = Successful Service Projects**

(60 Minutes)

#### *Learning Objectives*

- 1. Identify the ingredients of an effective community-building service project that helps to tell Rotary's story.*
- 2. Understand the role and importance of your leadership and commitment in your club's service projects.*
- 3. Understand the importance of periodically evaluating every club project.*
- 4. Understand the importance of international projects.*

1. How many of you have planned a service project for your club?
2. How did your club know your community would benefit from the project?
3. Think of a community impact project that went well in your club. How did your club decide to do it? What specifically made it successful?
4. What lessons have you learned that you can apply to other projects?

## **Your Role in Community Service Efforts**

5. As President, what is your role in supporting your club's community service efforts?

## **Building a Team**

6. Who will you work with within your club to carry out your club's community service projects?

7. Has your club partner with another club or organization on a successful service project? What happened?

## **Evaluating the Project**

8. How often should you evaluate the effectiveness of a club project? What questions should you consider when evaluating the effectiveness of club projects?

- a. Does your club have any weak (or "declining") service projects?
- b. Could some of your club service projects use an injection of enthusiasm?
- c. Are your projects still meeting critical community needs or does your club do a project "because we've always done that one before"?
- d. What does the "member participation rate" in your club service project(s) look like?

- e. Do your club service projects span more than one Avenue of Service?

### **Global Community Engagement**

9. It's important for your club to have a good mix of local and international service projects. We are Rotary "INTERNATIONAL" after all. How can your club get involved in an international service project?

10. How has your club been involved with an international service project?

11. What Rotary International and Rotary Foundation programs can clubs use to support their service projects?

<b><u>Identifying Community Needs</u></b>	<b><u>Projects should assist in driving new membership.</u></b>
<b><u>Rotary's Public Image Should Always be a Factor</u></b>	<b><u>Determining Whether A Project Is A Good "Fit" For Your Club</u></b>
<b><u>Insuring Club Support/Participation</u></b>	<b><u>Involving Members &amp; Committees</u></b>
<b><u>Partnering With Another Organization</u></b>	<b><u>Evaluating A Completed Project</u></b>

## **OBJECT OF ROTARY**

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

FIRST: The development of acquaintance as an opportunity for service;

SECOND: High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

THIRD: The application of the ideal of service in each Rotarian's personal, business, and community life;

FOURTH: The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

## **AVENUES OF SERVICE**

We channel our commitment to service at home and abroad through five Avenues of Service, which are the foundation of club activity.

Club Service focuses on making clubs strong. A thriving club is anchored by strong relationships and an active membership development plan.

Vocational Service calls on every Rotarian to work with integrity and contribute their expertise to the problems and needs of society. Learn more in *An Introduction to Vocational Service* and the *Code of Conduct*.

Community Service encourages every Rotarian to find ways to improve the quality of life for people in their communities and to serve the public interest. Learn more in *Communities in Action: A Guide to Effective Projects* and this Community Service presentation (PPT).

International Service exemplifies our global reach in promoting peace and understanding. We support this service avenue by sponsoring or volunteering on international projects, seeking partners abroad, and more.

Youth Service recognizes the importance of empowering youth and young professionals through leadership development programs such as Rotaract, Interact,



Rotary Youth Leadership Awards, and Rotary Youth Exchange.

**A successful service/community-impact project requires the following steps:**

- Conduct a needs assessment to determine the needs and concerns of the community. Projects repeated for many years can lose effectiveness and community impact.
- Develop a plan to ensure the project will be meaningful and successful
- Implement the project to provide the service.
- Evaluate current projects to plan for future projects, learning from the successes and the failures; evaluation should be a part of all stages, from project planning to implementation and post-project review

**Community Engagement Resources**

Contact information for Secretariat staff and RI and Foundation officers and appointees is listed in the Official Directory and at [www.rotary.org](http://www.rotary.org). Download publications at [www.rotary.org](http://www.rotary.org), or order them through [shop.rotary.org](http://shop.rotary.org).

The following resources are available to help you conduct successful service projects. They can be found from the Lifecycle of a Project webpage on MyRotary. MyRotary ☐Take Action ☐Develop Projects ☐Lifecycle of a Project.

*Communities in Action* (605a-EN) — Provides comprehensive instructions for planning, conducting, and evaluating a service project.

*Community Assessment Tools* (605-EN) Provides comprehensive details for how to conduct community assessments.

*Lead Your Club: Service Projects Committee* (225d-EN) – A comprehensive manual for your club’s Service Projects Committee.

*Rotary Showcase User Guide* – This guide will teach any Rotarian what Rotary Showcase is and how to use it effectively. It includes an anatomy of an efficient Showcase project including some featured past projects.

*Rotary’s Areas of Focus* (965-EN) – Provides excellent examples of service projects in each of Rotary’s Six Areas of Focus

Club and District Support representative — Staff members at international offices and RI World Headquarters who can answer administrative questions and direct other inquiries to appropriate RI and Foundation staff.

MyRotary – Visit EXCHANGE IDEAS ☐ COMMUNITY MARKETPLACE to find Rotarians and Rotaractors who are developing innovative resources that help clubs and districts connect with each other.

MyRotary – Visit EXCHANGE IDEAS ☐ DISCUSSION GROUPS to find a group that is discussing projects that you may want to emulate, or learn from, or even extend.

Rotarian Action Groups — International groups of Rotarians, Rotarian spouses, and Rotaractors who join together to conduct international service projects related to a specific topic.

Club Central – Club assessment and goal-setting tools used to plan service project goals. Via the RI website and through new Webinars, learn more about the system and how it can help your club plan for your year.

*Club Assessment Tools* (808-EN) - A companion piece to the Membership Development Resource Guide

RI programs newsletters — E-newsletters on specific RI programs. Sign up at <http://www.rotary.org/newsletters/>

*Rotary Community Corps Handbook* (770-EN) — Basic steps for organizing a corps, including how to identify potential leaders; also includes case studies and project ideas.

*The Rotary Foundation Quick Reference Guide* (219-EN) — A detailed overview of the programs and services of The Rotary Foundation.

*World Community Service Handbook: A Guide to Action* (742-EN) — Information on the WCS program, including overviews of donations-in-kind projects and the Rotary Volunteers program, as well as Rotary Foundation grants.

*Abuse and Harassment Prevention Training Manual / Leaders' Guide* (775-EN) — Youth protection guidance that can be modified to comply with local laws and situations to create and maintain the safest possible environment for participants.

## **Financial Resources**

Funds from individual donors or local businesses

Rotary Foundation grants and grants from other foundations Funds solicited through the <http://Ideas.Rotary.org> database

## **Session 4: Your Rotary Foundation**

(55 Minutes)

### *Learning Objectives*

- 1. Understand the importance of your leadership role and how to support and communicate Foundation programs.*
- 2. Learn about your Foundation's funding & management model.*
- 3. Identify the 6 areas of Rotary Foundation focus and how they relate to Rotary Foundation grants.*
- 4. Increase your knowledge about the types of Rotary Foundation grants and understand how clubs can use Foundation grants.*
- 5. Lead your club in establishing Foundation support goals.*

### **Your Leadership**

You have an important role to play as Club President in supporting the Rotary Foundation. It's Your Foundation!

1. How would you rate/assess your personal knowledge of the programs and initiatives of the Rotary Foundation?
  - A. Strong?
  - B. Pretty good?
  - C. Average?
  - D. Not sure?
2. What is committee is the best resource for helping you and your club to learn more and to achieve (or surpass) its Rotary Foundation goals?

## **Programs of the Rotary Foundation**

3. What are the key programs of your Rotary Foundation and how do they work?
4. Could your club benefit by “discovering” an international humanitarian project and by applying for a district or global grant to assist your club’s efforts?
5. Are Rotarians the only source of funding for The Rotary Foundation?

## **Rotary Foundation Grants Model**

6. What is the Rotary Foundation’s grant model?
7. What are the benefits of Rotary’s grant model?
8. Why is stewardship of Rotary funds important?

## **Areas of Focus**

9. What are the Rotary Foundation’s 6 Areas of Focus?
10. Why are these areas so important to us as Rotarians?

## **Supporting Rotary Foundation Programs**

11. How well do your club members “connect” with the Rotary Foundation?

12. What is your role in giving to The Rotary Foundation?

13. Are there Foundation goals that the President-Elect must complete? Have you set the fundraising goals for your club?

14. How will you engage your club to achieve your club’s Rotary Foundation goal?

15. As President, how will you support your club’s Foundation Committee?

16. How many of you have attended your district’s Rotary Foundation Seminar? How can the district Rotary Foundation Seminar help your club achieve its Foundation goals?

17. What will be your legacy of leadership and support for the Rotary Foundation?

## **Six (6) Areas of Focus:**

1. Peace and conflict prevention/resolution
2. Disease prevention and treatment
3. Water and sanitation
4. Maternal and child health
5. Basic education and literacy
6. Economic and community development

<https://www.rotary.org/en/learning-reference/about-rotary/areas-focus>

## **Best Practices**

1. Establish/strengthen your club's Rotary Foundation Committee
2. Plan a club program about the Rotary Foundation every quarter (especially in November, Rotary Foundation Month)
3. Include a brief story about the Rotary Foundation in every club program (e.g., a "Foundation Minute")
4. Schedule presentations that inform club members (especially new members) about your Rotary Foundation
5. Insure that your club is well-represented (by you and your Foundation Committee Chair and Foundation Committee members at the district Foundation Seminar)
6. Seek out ways to use and participate in Rotary Foundation grants
7. Investigate partnering opportunities with other clubs
8. Recognize (warmly and publicly) club members' financial contributions to The Rotary Foundation and their participation in Foundation programs; make recognitions special! (Example: Invite your Governor to present new Paul Harris Fellows and other recognitions)

9. Help club members understand the relationship between Foundation giving and Foundation grants/programs



<b><u>Foundation Focus Areas</u></b>	<b><u>Club Foundation Committee</u></b>
<b><u>Knowledge of YOUR Foundation</u></b>	<b><u>Foundation Programs</u></b>
<b><u>District Foundation Seminar</u></b>	<b><u>Promoting YOUR Foundation</u></b>
<b><u>Recognizing Club Members for Their Foundation Support</u></b>	<b><u>Getting Involved in Projects</u></b>

## Resources

- Your District Rotary Foundation chair and committee
- Your District Rotary Foundation Seminar
- Your District Grant Seminar
- Your District governor and assistant governors
- Your Regional Rotary Foundation coordinator
- Your Rotary Foundation staff at RI World Headquarters
- [www.rotary.org](http://www.rotary.org)
- [www.rotary.org/myrotary/en/rotary-foundation](http://www.rotary.org/myrotary/en/rotary-foundation)
- E-learning modules <https://my.rotary.org/en/learning-reference>
- Rotary Foundation Basics
- Rotary Six Areas of Focus and Choosing a Grant

## **Session 5: Membership Engagement, Growth & Development**

(55 Minutes)

### *Learning Objectives*

- 1. Identify strategies to engage and communicate with existing members and attract new members on a continuing basis.*
- 2. Share proven ideas/ways for communicating with and engaging potential, new, and current members.*
- 3. Understand the vital roles that member engagement and member education (i.e., continuing member education) play in member retention and club enthusiasm/morale.*

### **Your Club's Membership Approach**

1. As your club's President, what is your role in membership development? (Listen For: Lead by example by attracting new members)
2. Is your club:
  - A. Growing and retaining members?
  - B. Maintaining its membership, not growing but not losing members?
  - C. Losing members?
3. Is your club:
  - A. Excited about its future?
  - B. Complacent about its future?
  - C. Concerned about its future?
  - D. Really worried about its future?

4. Does your club have a specific approach to both membership development and membership retention?
5. Does your club have a specific action plan for member education and maintaining interest in your Rotary Club and in Rotary International?
6. How do your members “feel” about your club? When was the last time your club conducted a membership satisfaction survey?
7. Does your club conduct member exit surveys?

### **Attracting New Members**

8. Why is it important to attract new members?
9. From the perspective of attracting members, who are potential members?
10. What makes a Rotary Club attractive?
11. What are the obstacles that we face to bring in member?
12. What are some of your club’s “Best Practices” to attract new members?

## **Retention & Engagement**

13. Why do existing members leave Rotary clubs?
14. Is it important for your existing members to know the value of membership and the benefits of membership? Does your club give them reasons to stay?
15. What “Best Practices” does your club use to retain new members?

## **Rotary Education**

16. Why is it important to make Rotary education a high priority within your club?
17. How can you and your club educate or inform prospective members about Rotary?
18. Why is it important to educate current members?
19. What resources are available to help you and your club?
20. What types of training does your club offer to your members?

## **Effective Club Membership Development**

21. What are your club's membership development goals for the year?  
Two goals are important here:

A. Retention Rate

B. New members

22. Who will you work with to carry out your club's membership goals?

23. How will you assess your club's current membership situation?

<b><u>Attracting Members</u></b>	<b><u>Educating Members</u></b>
<b><u>Engaging Members</u></b>	<b><u>Prospective Members</u></b>
<b><u>Retaining Members</u></b>	<b><u>Exit Interviews</u></b>
<b><u>Diversity</u></b>	<b><u>Sponsoring New Clubs</u></b>
<b><u>Innovation</u></b>	





## Resources and References

- *Lead Your Club: President 2016-19 Edition*
- Rotary Club Central
- *Get More Out Of Membership: Connect For Good*  
<https://www.rotary.org/myrotary/en/document/connect-good>
- *Strengthening Your Membership: Creating Your Membership Development Plan* \_  
<https://www.rotary.org/myrotary/en/document/strengthening-your-membership-creating-your-membership-development-plan>
- *Lead Your Club: Membership Committee Manual 2016-19 Edition*  
<https://www.rotary.org/myrotary/en/document/lead-your-club-membership-committee>
- Club Assessment Tools\_  
<https://www.rotary.org/myrotary/en/document/club-assessment-tools>
- Membership section of MyRotary\_  
<https://www.rotary.org/myrotary/en/learning-reference/learn-topic/membership>
- New Member Orientation: A How-to Guide for Clubs\_  
<https://www.rotary.org/myrotary/en/document/new-member-orientation-how-guide-clubs>
- Rotary Basics (such as the *ABC's of Rotary*)
- Rotary Awards: <https://www.rotary.org/myrotary/en/learning-reference/learn-topic/awards>
- Rotary Global Rewards Program:\_  
<https://www.rotary.org/myrotary/en/member-center/rotary-global-rewards>
- Rotary Newsletters: <http://www.Rotary.org/newsletters>

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