

Rotary
NEPETS



UNITE, INNOVATE
& TAKE ACTION

President Elect Workbook



**THE MAGIC
OF ROTARY**



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Vision & Action Planning Facilitators Guide

Five Learning Objectives: (Quickly acknowledge the five learning objectives) **2 minutes**

- Understand Rotary’s Vision Statement and Action Plan
- Incorporate Rotary’s Vision Statement and Action Plan into the culture of your Club.
- Assess how their Club is doing right now.
- Identify critical issues or concerns your Club should address.
- Strategize how your club can achieve its vision using the Action Plan.

More than a century ago, RI pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that span the globe-bridging cultural, linguistic, generational and geographical barriers-and share the vision of a better world. As People of Action, we understand that fulfilling our vision requires a plan.

1. What is Rotary’s Vision Statement and Action Plan? Take this time as an opportunity to talk about RI’s current Vision & Action Plan as so the group has a sense of RI’s pathway. **(10 minutes)**

a. Rotary’s Vision Statement: Together we see a world where **People** unite and take action to **Create** lasting **Change** across the globe in our communities and in ourselves.

b. Rotary’s Action Plan through 2025: Increase Our Impact-What will our legacy be?

- **Expand Our Reach**- Opportunities that allow people who share our drive to participate in service. Learn who we are as a Club.
- **Enhance Participant Engagement**-What do members want?
- **Increase Our Ability to Adapt**- Be open to change. Take baby steps, change doesn’t have to be profound.

2. What strategies can you use to implement the Action Plan and be successful?



- a. **List strategies they can use to introduce the Action Plan and be successful.**



- b. **What are the Benefits of using the Action Plan within your Club?**

Increase OUR Impact!



Expand OUR Reach!



Enhance Participation Engagement!



Increase OUR Ability to Adapt



3. Support within their Club is necessary for RI's Action Plan to be effective and successful. Describe an approach with:

- Board Members?
- Club Members? Strengths / Weaknesses of your Club
 - Opportunities / Challenges in your community
 - Membership – growth/ reduction
 - Public Image
 - Engagement – Service and Social
 - Leadership – Succession planning / Administration Fundraising

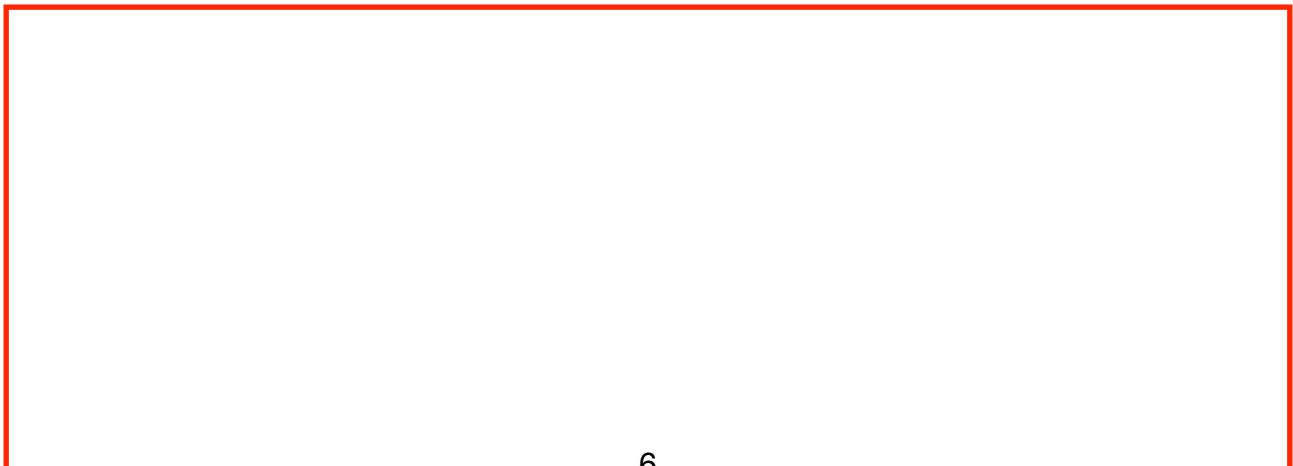
4. Identify critical issues or concerns that your Club should address



5. How can you achieve your vision

6. Assessment of how your Club is doing.

- Strengths / Weaknesses of your Club
- Opportunities / Challenges in your community
- Membership – growth/ reduction
- Public Image
- Engagement – Service and Social
- Leadership – Succession planning / Administration



DEI

We value diversity and celebrate the contributions of people of all backgrounds, across age, ethnicity, race, color, disability, learning style, religion, faith, socioeconomic status, culture, marital status, languages spoken, sex, sexual orientation, and gender identity as well as differences in ideas, thoughts, values, and beliefs. We believe that all people hold visible and invisible qualities that inherently make them unique, and we strive to create an inclusive culture where each person knows they are valued and belong.

There are five Learning Objectives of this training:

1. Understand Rotary's commitment to diversity, equity, and inclusion and apply that understanding to participant experiences
2. How to contribute to the implementation of the RI Diversity, Equity, and Inclusion Statement
3. Understand the barriers that may exist to inclusion.
4. Develop policies and best practices to make your club more welcoming, inclusive, and appreciative of each other
5. Provide opportunities to foster greater understanding and awareness of diversity, equity, and inclusion matters, including DEI training

What does diversity mean to you in the context of Rotary?

How can a diverse and inclusive club benefit both members and the community?

How can unconscious biases impact decision-making within your club?

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What qualities do you think are important for an inclusive leader?

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How can we increase our efforts in DEI at:

Club Events?

In District and Club Leadership?

When recruiting new members?

In club flexibility?

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What are some specific DEI initiatives you can implement in your club? How will you measure the success of these initiatives.

Diversity	Equity	Inclusion

Compare what you wrote above to how Rotary defines the terms.

Diversity

The quality of having a wide range of people from various backgrounds, cultures, experiences, and Identities

Equity

The fair treatment of all Rotary participants

Inclusion

Creating experiences and fostering environments where all people feel welcomed, respected, and valued

Role playing scenarios for further discussion:

Scenario: The club is discussing ways to increase diversity among its members. Two members have opposing views—one believes in prioritizing diversity to reflect the community, while the other is concerned that focusing on diversity might compromise the club's long-standing traditions. Role-play a conversation between these two members, exploring how they can find common ground and work towards a more inclusive club.

Scenario: The club is organizing a major fundraising event. Two members are leading the planning committee, but there's a disagreement on whether the event is accessible and appealing to a diverse audience. One member emphasizes the importance of inclusivity, while the other thinks the traditional approach is more effective. Role-play a discussion between these members on how to make the event more inclusive without losing its core essence.

MEMBERSHIP WORKSHOP

"Leading for Growth – Your Club and the Action Plan"

DISCUSSION LEADER GUIDELINES

Welcome participants, introduce yourself and review the learning objectives.

This session is designed to consider the four action plan priorities (***Increase Our Impact, Expand Our Reach, Enhance Participant Engagement and Increase Our Ability to Adapt***) - and guide Presidents-Elect with ideas for their plan to lead their club's membership growth. We will explore useful strategies and tools used by clubs across North America that have been successful in achieving and sustaining a growth culture.

Background: Since 2015 Rotary International has officially recognized **membership growth** as its top internal priority. Today's membership presentation is all about giving Presidents-Elect specific strategies for applying Rotary's 4 Action Plan priorities to leading for membership growth: Imagine... having more members to share the load in your club, more members to bring fresh ideas and generate energy, more members to step up and lead your club and more members to bring additional resources so that your club can do even more **good** in your communities... Imagine the increased impact...the difference Rotary can make.

Suggested Discussion Format:

1 – Facilitator(s) open the breakout session by summarizing the ACTION PLAN/re-stating **the specific actions** for each of the 4 *action plan priorities* as discussed in the plenary presentation by Herb Klotz (15 minutes) – these are the key strategies used by clubs across No America that have achieved and sustained a growth culture.

- **Increase our Impact**
 - Set realistic goals and track progress.
 - Strengthen club leadership & governance, especially succession planning.
 - Focus efforts on community (local and/or international)
 - Assess community needs and build meaningful partnerships.

- **Expand Our Reach**
 - Use multiple forms of media to tell your club's story.
 - Engage the entire club in attracting new members.

- Invite non-Rotarians to club meetings and service projects.
- Ensure membership reflects the community.

- **Enhance Participant Engagement**
 - Ensure a welcoming and “fun club culture.
 - Find new ways for members to be involved.
 - Respond to members’ interests and priorities.
 - Consider the cost of participation.

- **Increase Our Ability to Adapt**
 - Move forward with innovative ideas posed by your members.
 - Try new approaches to meetings, service projects, fun events, etc.
 - Maybe start a satellite or Impact, Rotaract, Passport Club!

2 – Each round table chooses one of the four action plan priorities and (with the help of a facilitator) discusses how the **specific actions** can be applied to and aligned with their own club and membership growth plans for their year. Each PE is asked to think about their own club’s membership strengths and weakness and then build on the specific action steps to shape their own strategies for the coming year for membership growth.

For example, suggest to the PE who wants to focus on *enhancing participant engagement* to consider how the specific steps from the ACTION PLAN used by successful clubs across North America can be used to strengthen his/her club and make it more welcoming.



At the end of the discussion, each PE at the table shares his/her specific take-away from this exercise.

Allow 20 minutes for this discussion; allow an additional 5 minutes for the individual reports (facilitators will need to keep table participants focused on message and brief).



3 – Each round table is given the following engagement scenario to consider and will discuss for 15 minutes followed by a spokesperson for the table who will share with the room (facilitators will monitor table discussion to ensure group stays on topic and no one monopolizes discussion), allowing 5 minutes for the debrief to the larger group:

The Rotary Club of Yula has 39 members. The club has a strong core group of 15 members who keep rotating through leadership positions. Over the past year, the other club members have not participated much, and some have started to leave the club entirely by discontinuing their membership in Rotary.

The incoming club President has noticed that many members are not attending meetings. After reviewing the membership reports, they found that the club had 54 members three years ago and has lost members each year. They know they need to address the declining membership.

What's the first thing you would do as the incoming President to address this issue?



What other steps would you take?

What changes would you consider making and what steps would you need to take to make these changes?

How would you handle members who don't agree with the changes?

How does this apply to possible changes needed in your own club?

THE ROTARY FOUNDATION

Your Foundation – The Rotary Foundation transforms your gifts into service projects that changes lives both close to home and around the world. With your leadership, generous contributions from your club members can be essential to securing and growing Rotary programs at home and throughout the world.

There are five Learning Objectives of this training:

1. Your role as President in supporting the work of Foundation
2. How to build and maintain Rotary Foundation engagement
3. How does the Annual Fund benefit Rotarians locally and globally
4. Creating a strong and knowledgeable foundation team
5. How the foundation can strengthen your club

How can you communicate to your Club the importance of “Every Rotarian Every Year”?

In your own words, how does giving to The Rotary Foundation enhance your experience with Rotary?

What impact do you hope your donation will have on future generations?

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How does donating to The Rotary Foundation expand Rotary's reach?

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When you think about The Rotary Foundation's future, what are you most excited about?

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Scenarios for discussion:

Scenario: The club is torn between supporting a local community project that aligns with their immediate needs or contributing to an international project that has the potential for greater impact. How should the club prioritize and allocate its resources to fulfill the mission of the Rotary Foundation?

Scenario: Imagine a Rotary club is planning a community service project but is unsure about how to secure funding. How can the Rotary Foundation be utilized to support this initiative? Discuss the various grant options available and how the club can apply for them.



Enhancing Public Image

Learning Objectives:

By the end of this session you will:

- Understand the Importance of Public Image
- Identify potential stakeholders, partners, and influencers who can support Rotary's public image initiatives.
-
- Develop strategies for collaboration with local businesses, media, and community organizations.
-
- Be able to assess the effectiveness of public image efforts

Understanding Public Image

What does "public image" mean to you in the context of Rotary?

Can you share an example of a successful public image campaign from Rotary (either globally or at the local level)? What elements made it effective?

Based on Rotary's core values and principles, how would you describe the ideal public image that a Rotary club should project to the community?

What message would you craft to communicate Rotary's mission and impact to a diverse audience in your community? What elements would you include?

From your perspective, which Rotary initiatives or projects exemplify positive elements of public image? Why do they stand out to you?

Strategies for Building a Positive Public Image

How do you envision leveraging digital platforms and social media to enhance your club's public image? Can you think of specific platforms and strategies that would work well in your community?

What are some effective ways to engage with traditional media outlets (e.g., newspapers, radio, TV) to share Rotary's story and achievements? Can you think of local media contacts or outlets that would be interested in covering your club's activities?

In your opinion, what are some practical club-level strategies for building and maintaining a positive public image? How can these strategies be tailored to fit the unique characteristics of your community?

Engaging Stakeholders and Partners

Who are some potential stakeholders and partners in your community that could support Rotary's public image initiatives? How might you approach them to collaborate effectively

What benefits do you see in building collaborative relationships with local businesses, media, and community organizations? How can these relationships contribute to a positive public image for Rotary?

Can you think of a successful partnership between a Rotary club and another organization or business? What made this partnership effective in terms of enhancing public image?

Measurement and Evaluation

What specific metrics or indicators do you think would be valuable for assessing the effectiveness of your club's public image efforts? How would you go about collecting this data?

How might you use feedback and evaluation results to refine and improve your club's public image strategies over time?

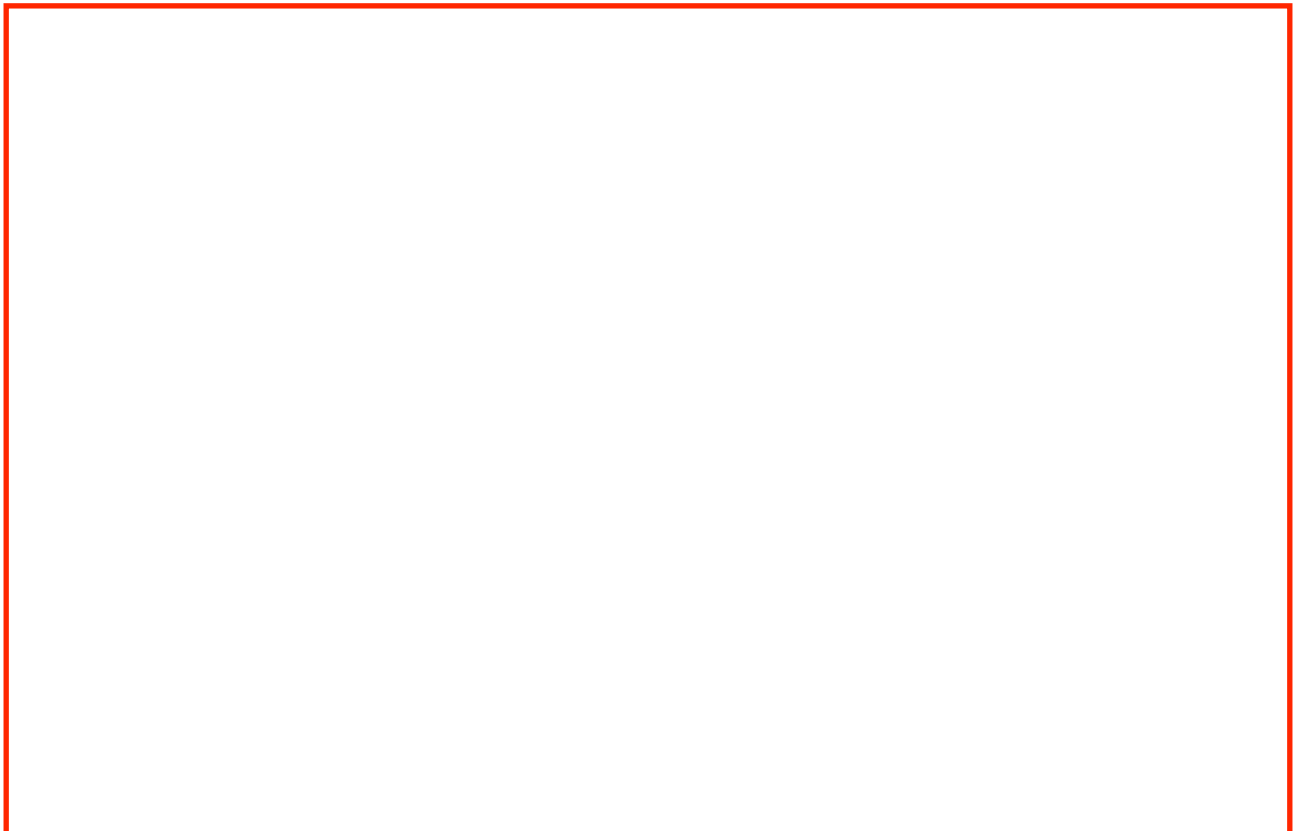
Can you think of an example from your own experience where evaluation and feedback led to meaningful improvements in a project or initiative? How might you apply this principle to your public image efforts in Rotary?

Scenarios to further discussion:

Scenario: A Rotary club has a fantastic community project but is struggling to get media coverage. How can the club improve its public relations strategies to gain more visibility and showcase the positive impact it is making in the community?

Scenario: The club is divided between embracing digital platforms for public outreach and maintaining traditional methods. Role-play a discussion among club members where they explore the benefits of leveraging digital tools while respecting the value of traditional approaches to enhance public image.

Scenario: Club members identify local influencers who could help amplify Rotary's message, but there's uncertainty about how to approach them. Role-play the process of reaching out to influencers, emphasizing the importance of building authentic relationships to enhance the club's public image



Governance

[STANDARD ROTARY CLUB CONSTITUTION](#)

[STANDARD ROTARY CLUB BY-LAWS](#)

[ROTARY CLUB MANUAL OF PROCEDURE](#)

[ROTARY CODE OF POLICIES](#)

[ROTARY CLUB HEALTH CHECK](#)

Effective Meetings

[FUN IDEAS FOR ROTARY MEETINGS](#)

[IDEAS FOR COMPELLING CONTENT](#)

[ROTARY LEARNING CENTER: ENGAGING ONLINE MEETINGS](#)

[TEN TIPS FOR EFFECTIVE MEETINGS](#)

Fundraising

[BEST ROTARY FUNDRAISING IDEAS](#)

[THE FUN IN FUNDRAISING ARTICLE](#)

[HOW TO CROWD FUND SUCCESSFULLY](#)

Disaster Relief

[SHELTER BOX](#)

TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. **The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world.** To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the coming years.

**INCREASE OUR
IMPACT**

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

**EXPAND OUR
REACH**

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

**ENHANCE
PARTICIPANT
ENGAGEMENT**

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

**INCREASE OUR
ABILITY TO
ADAPT**

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

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HOW TO TALK ABOUT OUR ACTION PLAN

Like the People of Action who inspired it, Rotary's plan for the future is bold.

This glossary will help all of us at Rotary speak about our goals with one voice and one vocabulary so we can move forward and act as one.

VISION

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

ACTION PLAN

The name for our five-year strategic plan, including four strategic priorities and 14 objectives.

PARTICIPANTS

All Rotary members and other individuals who engage in Rotary activities.

STRATEGIC PRIORITIES

INCREASE OUR IMPACT

Define, measure, track, and capture data from service projects to measure our impact, improve project quality, and create lasting change.

EXPAND OUR REACH

Develop new models of engagement to attract diverse Rotary participants and unite them in taking action.

ENHANCE PARTICIPANT ENGAGEMENT

Create new ways to inspire participants and provide valuable experiences that make them want to stay.

INCREASE OUR ABILITY TO ADAPT

Make Rotary's operating and governance structures more efficient, representative, flexible, and effective.

OBJECTIVES

The specific things we want the *Action Plan* to accomplish.

INITIATIVES

The actionable steps to achieve each objective. The Secretariat, with oversight from the Strategic Planning Committee, is responsible for accomplishing them.

INPUTS

The resources invested in a program.
Example: The materials used in a literacy program.

OUTPUTS

The immediate results of a program.
Example: The number of people who complete a literacy program.

OUTCOMES

The short-term or intermediate results of a program.
Example: The number of people who gain reading proficiency in a literacy program.

IMPACT

The long-term effects or end results of a program.
Example: The changes in education outcomes for the community.

CLUB EXPERIENCE MATTERS THE MOST

Recent Rotary research confirms that the single most important factor in member satisfaction is the club experience.

WHAT MAKES UP THE CLUB EXPERIENCE?

1 Meeting enjoyment — When members have fun, and feel that they are included and belong

2 Confidence in club leadership — When members feel that they have input in the club, their club leaders are open to their ideas, and when they trust the leaders to make good decisions for the club

3 Personal growth opportunities — When members feel that their club and Rotary offer ways for them to develop skills and to grow

4 Connections — When members feel that they've formed valuable relationships through Rotary

5 Meaningful service — When members feel that the service their club does makes a difference in the world and in their community

Using our [Membership Assessment Tools](#) guide, which includes the [Member Satisfaction Survey](#), can help you craft an experience that reflects your members' interests and needs.