

***Mid-Northeast PEELS 2025
Presidents-Elect Learning Seminar***

**Assistant Governors
Session Summary**

***MNE PEELS Learning & Development Committee
March 21-22, 2025***





Mid-Northeast PELS Presidents Elect Learning Seminar

2025-26 District Governors

D7210 Beau O'Loendorf
D7230 Garrett Capobianco
D7255 Lydia Wells
D7410 Tim Genetti
D7475 Bob Law
D7490 Cynthia Randina

Assistant Governors Pre-PELS Curriculum Summary

March 21-22, 2025

*Helpful Hint: ALWAYS sign-in to Rotary.org/Learn before using Learning Center direct links, then **click on the MNE PELS 2025 Learning Plan below and ENROLL in that Learning Plan!** DO NOT go directly to the individual courses using links below before enrolling in the Learning Plan!*

MNE PELS 2025 Assistant Governors Learning Plan

*Including **Assistant Governor Basics** Learning Plan+ **other courses*

The following courses should be completed prior to the District Team Learning Seminar & Pre-PELS Sessions:

- [Getting Started With the Learning Center](#) (15min)
- [Get Ready: Assistant Governor](#) (15 min)
- [Working with Your District Team](#) (15 min)
- [Supporting Your Clubs](#) (15 min)
- [Maximizing Governor Visits](#) (15 min)
- [Rotary's Action Plan and You](#) (15 min)
- [Rotary Club Central Resources](#) (15 min)

MNE PELS AG Pre-PELS Sessions:

- [Online Membership Leads](#) (30 min)
- [Protecting Personal Data](#) (30 min)
- [Committing to Diversity, Equity and Inclusion](#) (15 min)
- [Preventing and Addressing Harassment](#) (45 min)
- [Rotary's Change Model](#) (30 min)
- [Essentials of Understanding Conflict](#) (30 min)

Additional Courses:

- ** [Best Practices for Engaging Members](#) (45 min)
- ** [Rotary Foundation Basics](#) (45 min)
- ** [Areas of Focus](#) (30 min)
- ** [Promoting Your Club as People of Action](#) (15 min)
- ** [Public Relations and Your Club](#) (15 min)
- ** [Minimizing Risk](#) (15 Min)

** Course from other Learning Plans

Assistant Governors Session Summary

AG1a-c Being An Assistant Governor, *accompanied by*

Fireside Chats with RI Director Chris Etienne & RI President-Nominee Sangkoo Yun

March 21-22, 2025

Learning Objectives:

Assistant Governors motivate members to reach goals, recognize Club members as future leaders, communicate with Club and District leaders, and listen to all members to ensure that their needs are met. After this Session, participants will be able to:

- Define their role and responsibilities as Assistant Governors
- Identify the AG leadership expectations within the Clubs and Districts
- Identify two ways to strengthen Clubs

Resources: Always sign-in to Rotary.org/learn first to access the Learning Center links!

- [Get Ready: Assistant Governor](#) course on the Learning Center.
- [Working with Your District Team](#) course on the Learning Center.
- [Rotary's Action Plan and You](#) course on the Learning Center.
- [What Clubs Can Do](#) flyer on the Action Plan page

Key Messages:

- One of your key responsibilities is motivating others to reach Club and District goals.
- You're also responsible for checking in with Clubs to build relationships.
- Use Rotary Club Central to monitor goals and rate the Club's effectiveness.
- Use the four priorities of the Action Plan to help grow our Clubs.

Discussion Topics:

- What is your role and responsibility as an Assistant Governor?
- How can we support our Clubs and what does that look like?
- How do you identify and develop future leaders?
- How will you select and prepare the members of your Club leadership team?

Small Group Activity:

There are four Strategic Priorities in the Rotary Action Plan, and influencing change is an important part of your role as Assistant Governor. Break into groups, using the prompts below, brainstorm strategies to help grow your Clubs, and share the results with the entire group.

- How will you help Clubs increase their impact?
- How will you guide Clubs to reach new audiences?
- What advice would you give Clubs on how to cultivate a more inclusive environment?
- How will you help Clubs adapt more quickly?

Notes:

One important thing that I learned to bring back to my Clubs: _____

PREPARING TO BE AN ASSISTANT GOVERNOR

This learning path will help you develop your leadership skills and understand what to expect as an assistant governor. You'll use this, your prior knowledge and experience, and other district resources to prepare yourself for a successful year.



LEARN ONLINE

- Access the Learning Center and complete:
 - [Assistant Governor Basics learning plan](#)
- Other courses and learning plans based on your needs



LEARN TOGETHER

- Attend the presidents-elect training seminar
- Attend the district training assembly
- Participate in the district vibrant club workshop



WORK TOGETHER

- Accompany the current assistant governor as they conduct district business
- Meet with your governor
- Meet with other assistant governors in your area



PLAN

- Review the goals your clubs have set in Rotary Club Central
- Set goals for your role
- Visit your clubs and develop a plan for how to work with each one

Throughout this process, make sure to periodically reflect on what you've learned and evaluate how you're doing. Ask others for feedback so you can keep improving during your year in office.

ASSISTANT GOVERNOR

JOB DESCRIPTION

Your role as assistant governor is to help clubs succeed and support the governor. These are your official responsibilities:

- Visit each club regularly, in person or virtually, to discuss club activities, resources, and opportunities.
- Support clubs in setting and achieving goals, finding solutions to challenges, resolving conflicts, and meeting membership and financial requirements.
- Serve as a liaison between clubs and district committees.
- Assess each club's ability to thrive, and mentor club leaders on strategies to help their clubs succeed.
- Encourage clubs to get involved in district activities and committees.
- Help to organize, start, promote, and support new clubs, and especially encourage the use of innovative club types.
- Keep the governor informed about the progress your clubs make toward their goals.
- Stay up to date on Rotary initiatives.
- Share the status of clubs with your successor.

The **ROTARY ACTION PLAN**



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



ROTARY'S ACTION PLAN

WHAT CLUBS CAN DO

Rotary's Action Plan builds on our past successes and sets our future direction to ensure that we continue to grow, unite people, and make a lasting impact.

We encourage all members to review the Action Plan, think about your own club and district goals, and find meaningful ways to align those goals with our plan. Have open and ongoing discussions in your club and throughout your district about the new priorities and objectives, then use those talks to shape your own strategies.

For each of the four priorities that will direct our work, we've listed ways you can put that goal into practice. Think about how *you* can bring Rotary's Action Plan to life.

ROTARY'S ACTION PLAN

INCREASE OUR IMPACT



DEVELOP A STRATEGY for educating members about the importance of impactful service projects. Research shows that measurable, data-driven results offer proof of the impactful service that is attractive to the next generation of leaders.

CONDUCT A COMMUNITY ASSESSMENT to determine which issues are top concerns in the area. Learn about needs and strengths and identify the key decision-makers. Try conducting evaluations both before and after you implement projects to get a better sense of where and how you can create measurable, lasting change that truly helps the communities you serve.

FOCUS YOUR EFFORTS. Review your club's activities and determine which ones can be streamlined or eliminated so your club can spend more time on activities that make a real impact.

ENCOURAGE YOUR CLUB OR DISTRICT TO CELEBRATE THE LONG-TERM SUCCESSES of service and program offerings, but to be open to new projects or opportunities to prove that your club or district's impact has only begun. Apply for a global or district grant to fund a project that will have sustainable, measurable outcomes.

EXPAND OUR REACH



SET A GOAL to collaborate with new groups in your community, either through service projects or social events, to introduce more people to Rotary. As our vision statement says, we want to unite people — not just Rotarians — to create lasting change.

USE ROTARY'S MEMBERSHIP TOOLS and resources to assess your club and learn how to make it more diverse, open, and attractive to everyone in your community.

Districts should **CONSIDER FORMING NEW CLUBS.** Take advantage of our flexible club models to create clubs that are welcoming to people with diverse interests, backgrounds, and needs. As always, these new clubs should embrace our core values and deliver value to members.

BE SURE TO TELL COMPELLING STORIES about how your club or district is making a difference. Use the People of Action materials and other resources in the Brand Center to learn how to show your club or district's impact through the media, on social media, and in the community. Strengthening your public image can help you attract like-minded people to your club, form new partnerships for service, and build a stronger and more diverse network of collaborators.

ENHANCE PARTICIPANT ENGAGEMENT



FOCUS NOT ONLY ON GAINING NEW MEMBERS BUT ALSO ON DELIVERING VALUE — both personal and professional — to current members. Hold a brainstorming session or use a survey to ask members what's important to them in their club experience and how they want to grow and develop through Rotary.

Consider everyone who encounters Rotary a participant. Invite them to **OFFER NEW IDEAS AND SHARE THEIR THOUGHTS**. Encourage them to stay involved (whether or not they join the club) so they feel valued and are inspired to support Rotary activities.

USE OUR CURRICULUM in the Learning Center, to develop leadership and other skills in members and participants.

INCREASE OUR ABILITY TO ADAPT



HOLD INNOVATION FORUMS AND BRAINSTORMING SESSIONS

with club members and other participants to gather ideas for activities and service projects in the community. Contact other organizations or clubs that have a strong record of innovation or reinvention and look for ways to apply what they did to your own club.

SET ASIDE A SMALL FUND to try new ideas. Expand initiatives that succeed and document what you learn from those that don't.

REVIEW YOUR CLUB ROLES, PROCESSES, AND TASKS and look for ways to be more efficient — whether it's by reducing, combining, or eliminating responsibilities or using different technology.

ESTABLISH A CONTINUITY PLAN. Encourage club presidents, district governors, and other officers to work with the incoming leaders chosen for the next few years so that their efforts will be cohesive and all will be invested in a joint success.

EXPLORE ROTARY'S ACTION PLAN:
rotary.org/actionplan



SAMPLE CLUB COMMITTEE STRUCTURE

Rotary recommends five club committees. Clubs can add, eliminate, or combine committees or subcommittees according to their interests, activities, and number of members. Assistant governors or district governors can help club leaders determine suitable subcommittees.

OPTION 1: Standard Rotary Club Committees					
COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation
	<ul style="list-style-type: none">• Club program• Member communications• Website• Social events	<ul style="list-style-type: none">• Attraction• Engagement• New member orientation• Diversity	<ul style="list-style-type: none">• Media relations• Advertising and marketing• Web and social media	<ul style="list-style-type: none">• International• Community• Vocational• Youth service• Fundraising (for club projects)	<ul style="list-style-type: none">• Polio• Fundraising (for grants)• Grants

OPTION 2: Small Rotary Club Committees					
COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation

OPTION 3: Large Rotary Club Committees

COMMITTEES	Club administration	Membership	Public image	Service projects	Rotary Foundation
	POSSIBLE SUBCOMMITTEES	<ul style="list-style-type: none">• Club program• Club communications• Website• Social events	<ul style="list-style-type: none">• Attraction• Engagement• New member orientation• Diversity• New clubs• Membership leads• Assessment	<ul style="list-style-type: none">• Media relations• Advertising and marketing• Web and social media	<ul style="list-style-type: none">• International• Community• Vocational• Youth service• Fundraising (for club projects)

Assistant Governors Session Summary

AG2a: Knowing Your Resources

March 21-22, 2025

Learning Objectives:

Knowing how and where to find online tools and other resources makes it easy to help Clubs reach their goals and support Rotary's Action Plan. After this Session, participants will be able to:

- Identify three resources that can help to support Clubs.
- Promote Rotary's online tools to Clubs.

Resources: Always sign-in to [Rotary.org/learn](https://www.rotary.org/learn) first to access the Learning Center links!

- [Brand Center](#) link to understand, create, and explore new branding ideas.
- [Getting Started With the Learning Center](#) course in the Learning Center.
- [Rotary Club Central Resources](#) course in the Learning Center.
- [Service Project Center](#) page on MyRotary.org.
- [Committing to Diversity, Equity and Inclusion](#) course in the Learning Center.
- [Online Membership Leads](#) course in the Learning Center.
- [Club Excellence Award](#) page on MyRotary.org
- Rotary Citation/Club Excellence Award Frequently Asked Questions pdf download.
- Club Health Check pdf download.

Key Messages:

- One of Rotary's strategic priorities is to increase our ability to adapt. If we want to continue adapting in the future, we need to try new ideas, streamline our processes, and involve more Club members.
- Consider diversifying your leadership team by finding and supporting new leaders.
- Meet with your Club board monthly to review progress on goals and tasks.
- Know that what motivates your members will vary from person to person. Be prepared to use different methods of motivation as you plan, implement, and celebrate achievements.
- Work with your Assistant Governor and other District leaders to help your Club succeed.

Discussion Topics:

- Why should Clubs enter their goals in Rotary Club Central?
- How can AGs support Clubs in achieving their goals?
- How can you promote the District committees to Club leaders?
- What are the benefits of posting completed projects on the Service Project Center?
- How can you help Clubs manage membership leads on My Rotary?

Small Group Activity:

Increasing our ability to adapt is one of the four Strategic Priorities in the Rotary Action Plan, and Identifying people and resources that will help you support Clubs is going to be key in your success.

- **Scenario 1:** A Club President has asked for ideas to boost membership. What resources can the Club use to develop its membership strategy?
- **Scenario 2:** A Club is interested in doing a community project but doesn't know where to start. Who, and what resources, could help a Club plan a service project?
- **Scenario 3:** A Club's global grant application was denied. What resources would you recommend to help the Club get its grant approved?
- **Scenario 4:** One of your Clubs has not updated its Club logo yet. What resources would you recommend to the Club's members to help them update their logo.

Notes:

One important thing that I learned to bring back to my Clubs: _____

Assistant Governors Session Summary

AG2b: Addressing Challenges

March 21-22, 2025

Learning Objectives:

Assistant Governors will encounter difficult situations throughout the year, we will review some best practices for learning practical skills or giving participants a new understanding of a concept through an interactive activity. After this Session, participants will be able to:

- Learn ways to address difficult conversations
- Recognize best practice to address challenges
- Identify the basics of conflict and how to manage it appropriately

Resources: Always sign-in to Rotary.org/learn first to access the Learning Center links!

- [Minimizing Risk](#) course on the Learning Center.
- [Preventing and Addressing Harassment](#) course on the Learning Center.
- [Essentials of Understanding Conflict](#) course on the Learning Center.

Key Messages:

- As a leader of your District, you will be presented with a number of challenges. These might relate to your own responsibilities, to personality conflicts, or to management of people or projects. Some specific examples include failure to function, election disputes, Club resignations, or member apathy.
- Challenges can also include more serious issues involving harassment, discrimination, or youth protection.
- Addressing challenges will almost always involve being able to handle difficult conversations — with your team members, with Clubs or participants, or with others.
- The Essentials of Understanding Conflict course in the Learning Center is recommended.
- Consider what strategies you will use to become more comfortable with difficult conversations, so they won't be something you or your team members avoid. Think about successful strategies you've observed in your workplace, family, or culture.

Discussion Topics:

- When approaching a difficult or uncomfortable situation, what considerations do you need to make?
- Do you have an example of how you successfully navigated a difficult conversation or a challenging interaction?
- What successful strategies or tips from your own experience can you share for handling these situations?

Small Group Activity:

As an Assistant Governor you may encounter difficult conversations, but understand you are not alone in addressing them. Break into small groups of 3-4 people, using the scenarios below, brainstorm strategies to manage the necessary steps to handle the situation, and share the results with the entire group.

- **Scenario 1** Your club is trying to involve more community members in its meetings and projects, but membership has not increased consistently over the past five years. Many people contacted either don't join, or if they do, they leave after a year or two. It seems the club may not be fostering a welcoming environment for newcomers, especially those from underrepresented groups.

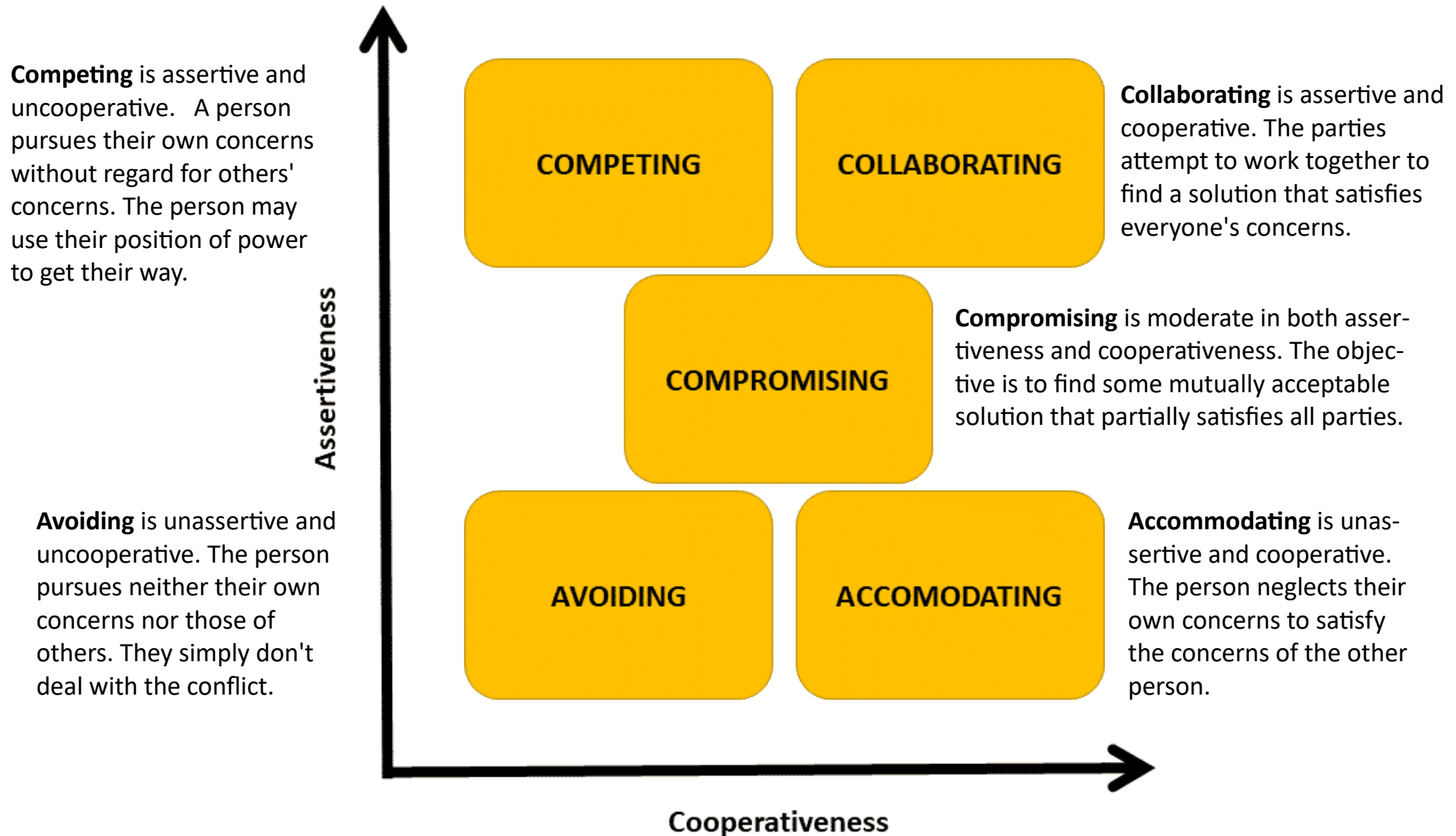
- **Scenario 2** A club in your district consistently fundraises and carries out service projects that help the local community, but its leaders refuse to work with other clubs on projects or activities. You believe that by isolating itself from the other clubs in the district, this club is missing opportunities to take part in bigger projects — including global grant projects.
- **Scenario 3** An AG has attempted to contact a club president through email multiple times but has not received any replies. The AG was seeking a date to visit the club. After several phone calls, the AG finally managed to have a conversation. The Club President explained to the AG: “I apologize for not getting back to you. I've been quite busy but rest assured that you do not need to attend our meetings; everything is fine.”

Notes:

One important thing that I learned to bring back to my Clubs: _____

What's your style?

Whether or not you do it consciously, you probably already manage conflict. Kenneth W. Thomas and Ralph H. Kilmann identified five styles of conflict management. Most people regularly use one or two of these styles:





Assistant Governors Session Summary

AG3a: Membership Panel Discussion

March 21-22, 2025

Learning Objectives: *Participants will learn about Membership resources from Senior Rotary leaders and Rotary International staff members. Planned panelists include Zone 32 Rotary Coordinator Cindie Kish, Assistant Rotary Coordinators Mel Ellwood & Sam Maruzzelli, and Rotary International Regional Membership Officer Diana Edwards. After this Session, participants will be able to:*

- Understand current membership trends & information
- Learn ways to attract and retain members.
- Use the Action Plan as a model to attract new members.
- Learn about new membership leads program.
- Learn about resources for membership and membership goals.
- Learn about The Club Experience.
- Understand the New AG Role per RI.

Resources: *Always sign-in to [Rotary.org/learn](https://www.rotary.org/learn) first to access the Learning Center links!*

- [Strategies for Attracting New Members](#) course on the Learning Center.
- [Best Practices for Engaging Members](#) course on the Learning Center.
- [Creating an Inclusive Club Culture](#) course on the Learning Center.
- [Diversify Your Club](#) course on the Learning Center.
- [Online Membership Leads](#) course on the Learning Center.
- [Diversifying Your Club: Member Diversity Worksheet](#) PDF download.
- [Finding New Club Members: Identifying Prospective Members Worksheet](#) PDF download.
- [Engaging Younger Professionals](#) page on Rotary.org.
- [Creating a Positive Experience for Prospective Members](#) PDF download.
- [Membership](#) resources page on MyRotary.org.
- <https://my.rotary.org/en/document/what-makes-up-the-club-experience>

Key Messages:

- Assist clubs in developing a strong, diverse Club membership committee to implement strategies to achieve your membership goals.
- Review your Club's [membership reports](#) to analyze trends.
- Assist clubs with diversity, so people of all backgrounds feel welcome attract new members who want to make a difference.
- Help clubs in building relationships with a variety of groups in the community and to learn what they think about the Club and the community's needs.
- Analyze your Club's history of bringing in new members to learn what you're doing well and what could be improved.
- RI has added new responsibilities to your role. What are they and when do they take effect.
- Help clubs develop methods that engage prospective members without pressuring them.
- Help clubs develop alternative experiences.

Discussion Topics:

- What are the key changes coming to the tool & process for membership leads?
- Can would be a good time to share with club leaders about the new membership leads process & next steps?
- What is the role of an AG regarding The Club Experience?
- How can an AG utilize the club experience to grow clubs?
- How do new clubs enhance Rotary's ability to serve diverse communities?

- What role do new clubs play in Rotary's mission and future growth?
- Rotary International has recently set some membership goals for Rotarians & Rotaractors. What are those new goals & when do they want to achieve them?
- How do these new goals affect you, the AG's?
- How can we support clubs with membership growth?
- Are there ways to increase the Presidents' knowledge of membership resources?
- How clubs balance fun & fellowship with accomplishing important Rotary business?
- What are the different aspects of the club experience that clubs should be thinking about?

Panel Discussion Closing Activity:

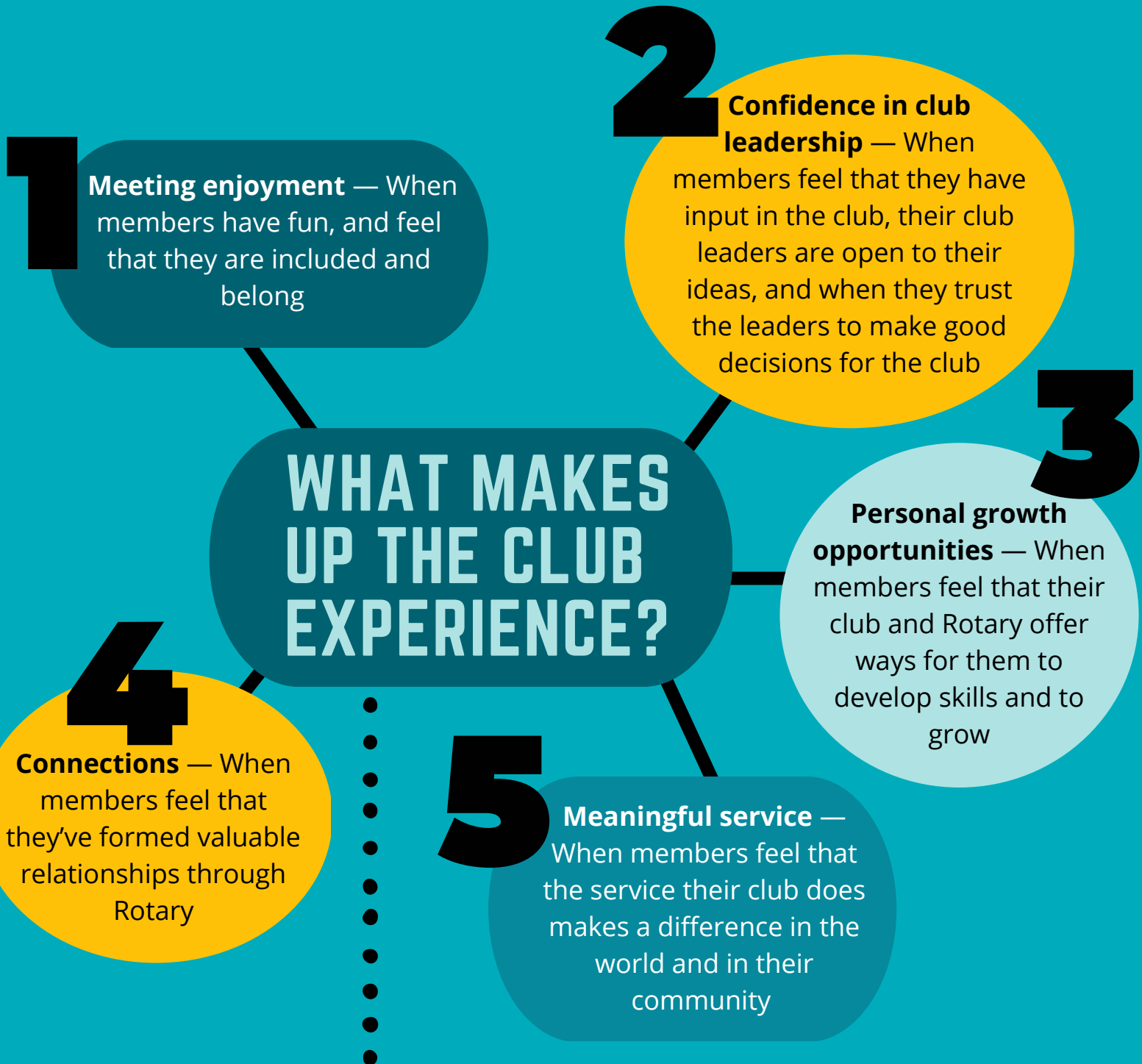
Each Panel member will be given the opportunity to conclude with a brief recap of the information that they feel is most important from their perspective on this topic.

Notes:

One important thing that I learned to bring back to my Clubs: _____

CLUB EXPERIENCE MATTERS THE MOST

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



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.

DESIGNING YOUR ROTARY EXPERIENCE

GET INVOLVED IN WAYS THAT MATTER TO YOU

Rotary offers benefits for people of all ages and backgrounds. From learning more about the world to learning more about yourself, you can grow by engaging with Rotary's global network and the array of activities, programs, and interest groups that Rotary offers.

When you get involved in Rotary, whether as a Rotarian, Rotaractor, or program participant, you expand your perspective by honing your skills, learning from professionals, making new connections, and making a difference in your community and around the world.

We know that each member has a unique combination of interests, skills, and talents, and so each member will be attracted to different activities. This guide describes the options you can choose from to personalize your Rotary experience and get involved in ways that matter to you.



Rotary 



MAKE CONNECTIONS

Rotary is a global community with 1.4 million Rotarians and Rotaractors from clubs in nearly every country. This means you can connect with others near home or across the globe. Here are some ways you can make connections through Rotary.



+ ATTEND CLUB MEETINGS AND EVENTS.

Introduce yourself to members in your club to get to know them better. Being genuinely interested in others shows people you value them, and these small interactions can lead to lasting friendships.

+ CREATE A MY ROTARY ACCOUNT.

When you register for a [My Rotary account](#) and create a profile, you can access Rotary's online tools and locate and connect with members near and far using the [Find a Member](#) tool.

+ ATTEND DISTRICT MEETINGS AND EVENTS.

Clubs are grouped into more than 500 districts worldwide. By connecting with other clubs and leaders in your district, you can learn how to get involved in Rotary beyond your club and make a greater impact.

+ GET INVOLVED WITH CLUB INITIATIVES.

Volunteering to take part in a project, attend a meeting, or serve in a club role, such as being on a [committee](#), will let you work with others in meaningful ways and contribute to your club's impact. You can also suggest speakers from [service and project partners](#) or from other organizations that share Rotary's values. Ask your club how you can help.

+ VISIT ANOTHER CLUB.

You can locate Rotary and Rotaract club meetings to attend using the [Find a Club](#) tool. You might think of ways to collaborate on club activities or hear of an idea you want to try with your club. Visiting other clubs fosters new connections and inspiration.

+ JOIN A ROTARY FELLOWSHIP.

Meet others with similar interests by joining a [Rotary Fellowship](#), an international group of people with a common hobby, identity, culture, or vocation. This is a fun way to make friends and explore a pastime or profession.

+ JOIN A ROTARY ACTION GROUP.

These include people around the world who have expertise and passion in a particular area, such as economic development, education, the environment, or safe water. Join a [Rotary Action Group](#) to share your knowledge, develop your skills, and make professional and personal connections.

+ PARTICIPATE IN A ROTARY FRIENDSHIP EXCHANGE.

Experience different cultures and build international understanding and friendships. This program for Rotary members and friends prioritizes cultural immersion, international service, or vocational exchanges. [Friendship Exchange](#) participants take turns hosting one another in their homes and clubs.

+ ATTEND A PROJECT FAIR.

Meet people with whom you can collaborate on international projects. [Project fairs](#) typically last two or three days and can include visits to project sites as well as opportunities to experience the local culture. These activities let visitors learn about the community and build long-lasting relationships with their hosts.

+ ATTEND THE CONVENTION.

The [Rotary International Convention](#) is held in a different international city each year. You'll meet members from around the world, learn how to expand our impact, and enjoy inspiring talks from global leaders, celebrities, and activists.

PARTICIPATE IN MEANINGFUL SERVICE

Making a difference in the community is one of the top reasons people get involved in Rotary. We channel this commitment through five Avenues of Service — Club Service, Vocational Service, Community Service, International Service, and Youth Service. Here are some ways you can take part in meaningful service through Rotary.



SUPPORT YOUR CLUB.

You can help your club thrive by offering your expertise and skills through serving as a club officer, as a committee member, or in another role.



PARTICIPATE IN LOCAL SERVICE ACTIVITIES.

Find out what projects your club, neighboring clubs, and your district are working on and volunteer for one or more. Work with partners or conduct a community assessment to identify projects that would benefit your local area.



PARTICIPATE IN INTERNATIONAL PROJECTS.

Many clubs partner with clubs in other parts of the world to address a need in one of their communities. Together, they have more time and funding, as well as the expertise of members, partners, and Rotary program alumni to bring about sustainable, positive change. Find a project and get involved.



USE YOUR PROFESSIONAL EXPERTISE.

Many districts have a district resource network of local experts who can use their experience, technical knowledge, and project-planning skills to assist clubs in the design and implementation of meaningful projects. Contact your district international service chair to offer your skills to mentor clubs and improve communities.



SUPPORT AN INTERACT CLUB.

Interact clubs bring together people ages 12-18 to develop leadership skills while participating in service. If your club sponsors or co-sponsors an Interact club, you can help empower Interactors to make a difference in their communities and globally by supporting their service-learning projects.



PARTICIPATE IN ROTARY YOUTH LEADERSHIP AWARDS.

RYLA events provide opportunities to build leadership, communication, and problem-solving skills, while having fun and forming lasting friendships. Talk to your club and district leaders about getting involved by nominating participants or assisting event organizers.



WORK WITH A ROTARY COMMUNITY CORPS.

These groups of nonmembers partner with local Rotary and Rotaract clubs on service projects. By working with a Rotary Community Corps, you can build engagement in the area and make your projects more sustainable by positioning local leaders to pioneer change.



USE YOUR SKILLS WITH A ROTARY ACTION GROUP.

Use your professional skills to make a sustainable impact locally and globally through one of Rotary's more than 25 action groups. By leveraging people's expertise and our global network, Rotary Action Groups help clubs and districts plan and implement meaningful, large-scale humanitarian service projects.



APPLY FOR A GRANT.

If your project meets certain requirements, it might be eligible for funding from The Rotary Foundation. Explore the grant types and find one that's right for your project.



JOIN THE EFFORT TO ERADICATE POLIO.

Raise awareness about Rotary's work to end polio, donate to the PolioPlus Fund, or volunteer for a National Immunization Day. Post about polio on social media or include a link to endpolio.org in your email signature. Write to us to learn about upcoming trips for NIDs.



SUPPORT ROTARY'S CURRENT WORK.

You can do this by giving to The Rotary Foundation, which sustains thousands of projects in your community and around the world. The Foundation supports projects and programs that transform lives by addressing poverty, disease, conflict, and lack of education and water.

BECOME A LEADER

Rotary offers many opportunities to develop your leadership capabilities. Whether you're interested in a club or district role or in building new skills, leadership can be a cornerstone of your Rotary experience. Here are ways you can become a leader through Rotary.



+ SHARE YOUR IDEAS WITH YOUR CLUB.

You can help your club achieve its goals, improve its projects, and enhance the member experience. Clubs can evolve by being receptive to new and diverse perspectives, and your suggestion could become the next big initiative in your club or community.

+ EXPLORE LEADERSHIP COURSES.

Use Rotary's Learning Center to improve and practice your skills. Rotary's [professional development courses](#) include topics such as resolving conflict, public speaking, and networking. You need to have a My Rotary account, so be sure to [register](#) if you haven't already.

+ GIVE A SPEECH AT A CLUB MEETING.

Introduce yourself or discuss an area of expertise in order to practice your presentation skills. If your club meetings don't offer this opportunity, suggest it to your club leaders or contact [your local Toastmasters club](#) and ask to be a guest speaker.

+ BECOME A MENTOR.

Share your professional expertise, community knowledge, or Rotary information as a mentor. Ask if your club has a mentoring program, and if not, propose starting one. Take the [Mentoring Basics course](#) and learn to use your experience to help others grow.

+ LEAD YOUR CLUB.

Find out what committees and other leadership opportunities your club has, and volunteer for one that interests you. You'll learn more about your club and Rotary and gain skills in the process. Explore the [Club Leadership catalog](#) to find out about these roles.

+ ORGANIZE A CLUB EVENT.

Volunteer to coordinate a social gathering or service project, and gain skills including collaboration, public speaking, or managing other volunteers.

+ LEAD YOUR DISTRICT.

If you've served as a club leader and want to get more involved, find out how to do so at the district level. Learn about district roles with the [District Leadership catalog](#) and talk to your club and district leaders about available opportunities.

+ BUILD PEACE.

Join the [Rotary Positive Peace Academy](#), created with Rotary's partner, the Institute for Economics and Peace, to learn about building and sustaining peace and the Positive Peace framework. Learn about the [Rotary Peace Centers program](#), which trains leaders from communities around the world to address peace and development issues.

+ SERVE IN INTERNATIONAL LEADERSHIP ROLES.

Lead global groups of communities of people with similar interests, hobbies, professions, and passions by serving in a leadership role in a [Rotary Fellowship](#) or [Rotary Action Group](#).

EXPAND YOUR PERSPECTIVE

When you make connections, participate in meaningful service, and take leadership roles, you'll inevitably develop and expand your perspective. Here are more ways you can experience personal growth and expand your perspective through Rotary.



PERFORM ACTS OF KINDNESS.

Being gracious and caring empowers all parties involved and contributes to people's mental well-being. In Rotary, you have many opportunities to make a positive impact on someone's life by expressing kindness.



TAKE COURSES IN THE LEARNING CENTER.

Beyond the courses mentioned elsewhere in this guide, you can find online courses about specific Rotary programs, policies, and leadership roles, as well as more general skill development. Courses are available in more than 20 languages.



CONNECT WITH TOASTMASTERS.

Rotary's alliance with Toastmasters International means you can take [leadership courses](#) to develop and practice your skills. You can also [visit](#) a meeting or work with a Toastmasters club on joint initiatives.



ATTEND LEARNING EVENTS.

Connect with other members in your area by taking part in one of these informational events offered by your district. You'll learn more about Rotary and other clubs in your community. Visit your district's website or contact your club leaders to find out when your district's next event will occur.



WELCOME A YOUTH EXCHANGE STUDENT.

If your district is certified to participate in [Rotary Youth Exchange](#), you can offer to host or help welcome a student from another country, learn about their culture, share your culture with them, and create a memorable learning experience.



EXPLORE OTHER CULTURES.

Because Rotary and Rotaract clubs are all over the world, you can [visit clubs](#) when you travel and experience how diverse clubs in other towns or countries are. In addition to programs like Friendship Exchange or Youth Exchange, this is a way to broaden your intercultural understanding, build friendships, and learn about a region's history and customs.

HOW WILL YOU GET INVOLVED?

With so many ways to get involved, you can design the Rotary experience that suits you best. Talk to your fellow club members and leaders and share your interests and ideas. Take an active role in shaping your club. All of this will allow you to get the most out of your Rotary experience!

Assistant Governors Session Summary
AG3b: Public Image Panel & Table Discussion

March 21-22, 2025:

Learning Objectives: *Participants will learn about Public Image resources participating in table discussions as well as from Senior Rotary leaders. Planned panelists include Past Rotary International Public Image Coordinator Nikki Mederos, Zone 32 Assistant Rotary Public Image Coordinators Mahbub Ahmad & Janet Kolepp, and D7255 Public Image Chair Taylor Quaranta. After this Session, participants will be able to:*

- Develop a clear understanding of your role in providing public image (PI) support to clubs.
- Gain familiarity with available resources to effectively assist clubs in maintaining consistent branding and communication.
- Enhance listening skills to identify issues and challenges faced by club leaders and strengthen your ability to connect them with appropriate solutions.

Resources: *Always sign-in to [Rotary.org/learn](https://www.rotary.org/learn) first to access the Learning Center links!*

- [Brand Center](#) page on MyRotary.org
- [People of Action messaging](#) on the Rotary Brand Center.
- [Enhancing Our Public Image](#) page (includes links to the Learning Center courses)
- [Messaging Guide](#) pdf download from the Rotary Brand Center.
- HANDOUTS: Tips, Tricks & Resources & Public Image Checklist

Key Messages:

- **Understanding Roles:** Assistant governors play a crucial role in supporting public image (PI) initiatives by encouraging clubs to adopt consistent branding and communication strategies.
- **Utilizing Resources:** Familiarity with tools like the Rotary Brand Center and branding guidelines is essential for assisting clubs in creating unified and impactful materials.
- **Addressing Challenges:** Actively listening to club leaders helps identify common issues and challenges in public image efforts, paving the way for effective support and solutions.
- **Fostering Connections:** Facilitating connections between clubs and available resources, such as district public image chairs and RI Zone 32 contacts, ensures that leaders receive the guidance they need.

Discussion Topics:

- What do you see as your primary role in supporting public image (PI) efforts within your clubs?
- How can assistant governors effectively encourage clubs to embrace Rotary's branding and communication guidelines?
- What challenges might Clubs face in accessing or utilizing branding resources, and how can you assist them?
- What common public image issues or challenges have you observed in clubs, and how have they been addressed?
- How can you foster open communication with club leaders to identify their challenges and connect them to appropriate solutions?

Table Discussion Activity:

Each table will be assigned one of the discussion topics listed. A presenter from each table will be chosen who will summarize the discussion at the table. At the end the 4 panelists will open up the session for Q & A.

Notes:

One important thing that I learned to bring back to my Clubs: _____



Rotary

PUBLIC IMAGE CHECKLIST

DO

	Review the materials on Brand Center (www.rotary.com/brandcenter)
	Create your own club logo from Brand Center
	Create a club brochure if you don't have one (template on Brand Center)
	Create a club presentation if you don't have one (template on Brand Center)
	Include the Rotary logo (Rotary + wheel) and/or mark on your materials
	Make sure the Rotary logo is at least 60 pixels in size
	Use Arial Narrow (all upper case) for headlines, Georgia for text
	Use Rotary colors: Azure, Royal Blue, Gold, Sky Blue as primary colors
	Use photographs that reflect Rotarians in action: high resolution, people
	If not using photographs, use graphics that reflect the iconography style: simple, modern, informative
	Ensure your promotion materials reflect the Rotary operating principles: Join Leaders, Exchange Ideas, Take Action
	Make sure your "voice" is smart, compassionate, persevering, inspiring —reflect that in how you speak, write, and design
	Include a call to action on every communications deliverable (email, website, Facebook, phone number)—tell readers what they should do
	Be inspirational and human in all of your communications!

DON'T

	Use the old Rotary logo
	Change the new Rotary logo (color, reformatted, cropped)
	Make the logo and mark the same size: The wheel should be 4x the height of the logo if you use both
	Use upper and lower case in headlines
	Use clip art imagery that is cartoonish—it should reflect the Rotary operating principles, voice, and iconographic style

Your Logos at a Glance

DECEMBER 2020

A consistent voice and visual identity are essential components of a strong brand. By using the design elements in this guide you ensure that our brand is presented in a unified way, helping to build awareness and recognition of Rotary and Rotaract. You can find more information on the Brand Center at rotary.org/brandcenter.

Your club, district, or zone logo is made up of the Masterbrand Signature (MBS) plus the club name, or the district or zone number. Multiple district or zone numbers can also be listed. This logo must be used instead of the MBS alone. No other words should appear above or below the MBS.

You can use either the MBS or the simplified version in your club, district, or zone logo. We recommend using the simplified version if the logo will be smaller than 1.25 cm (0.5 inches) or will be embroidered.

Find templates for creating your logo on the Brand Center at rotary.org/brandcenter.


Reverse Options



CLUB, DISTRICT, OR ZONE LOGOS

Masterbrand Signature

Club Name
above or
Rotary
Club Name, District,
or Zone below



Examples

Rotary
Club of Evanston



Rotary
District 3310




Masterbrand Signature Simplified

Club Name
above or
Rotary
Club Name, District,
or Zone below



Sunrise Kampala
Rotary
Club



Rotary
Zone 8



Rotaract Masterbrand Signature

Club Name
above or
Rotaract
Club Name, District,
or Zone below



Examples

Rotaract
Club of University
of Chicago



Rotaract
District 3310



Rotaract Masterbrand Signature Simplified

Club Name
above or
Rotaract
Club Name, District,
or Zone below



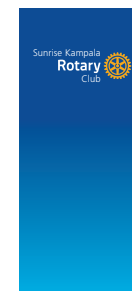
Toronto
Rotaract
Club



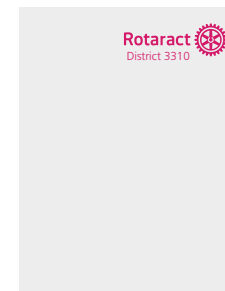
Rotaract
Zone 8



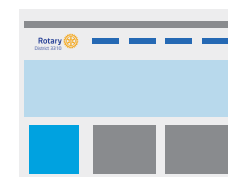
Layout Examples



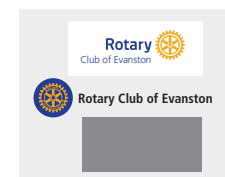
club brochure



flyer



website



facebook*

*exception: the Mark of Excellence can be used for social media profile pictures

Clear Space



Clear space is the space surrounding the club, district, or zone logo that needs to remain empty. It is equal to the height of the capital "R" in "Rotary" or "Rotaract."

Lockups are used to show a relationship between your club, district, or zone and partners, sponsors, programs, or events. Only one logo can be featured in a lockup with your club, district, or zone logo.

The lockup should not be used as your club, district, or zone logo.

Find templates for creating your own lockup on the Brand Center at rotary.org/brandcenter.

RESOURCES

BRAND CENTER:
rotary.org/brandcenter

LEARNING CENTER:
rotary.org/learn

LICENSED VENDORS:
my.rotary.org/licensed-vendors

SUPPORT CENTER:
rotarysupportcenter@rotary.org

CHECKLIST

Make sure to use your club, district, or zone logo on the following:

- ☐ Your club website
- ☐ Your club social media sites
- ☐ Banners and event signage
- ☐ Signage, including those located outside of your club meeting place or on city welcome signs
- ☐ Flyers and brochures
- ☐ Apparel and goods (purchased or produced by a Rotary-licensed vendor)
- ☐ Name badges
- ☐ Trading banners/flags

LOCKUPS

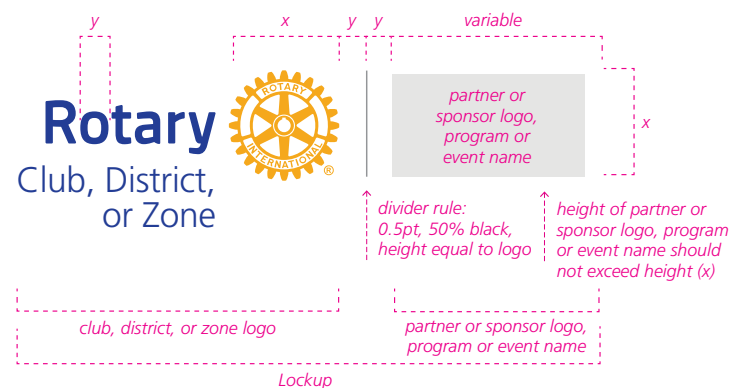
Logo Lockup Examples



Word Lockup Examples



Lockup Construction



NAMING PROJECTS OR EVENTS

When naming a project, event, or website URL, you must include the name of your club or district if you want to include the word Rotary or Rotarian(s). For example, instead of calling your event Rotary Bingo, call it Rotary Club of Evanston Bingo Night. You might also call it We Love Bingo!, leaving out any reference to Rotary. These guidelines are outlined in the Rotary Code of Policies. Please note that when using your club name, your club must be in full control of the event or project. The Rotary name cannot be licensed to a third party. For example, if a summer camp is opening in cooperation with your club, don't name it Rotary Camp.



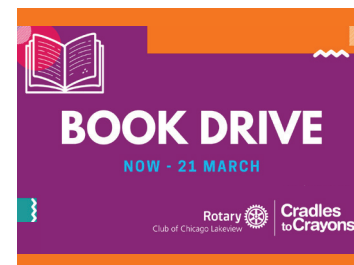
Club logo on installation



Multiclub sign



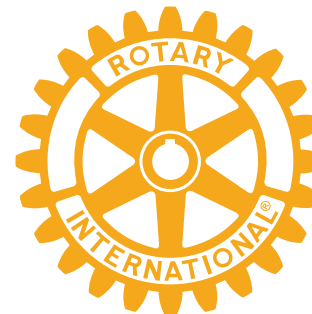
Rotaract club event



Rotary club event

MARK OF EXCELLENCE

The Rotary wheel is the Mark of Excellence (MOE) and should be considered the secondary logo. When you use it, we encourage you to position your club, district, or zone logo nearby for clarity and recognition. There is no simplified version of the MOE — the words "Rotary International" must always appear in the wheel.



The MOE should appear in Rotary Gold. If you're printing one-color, azure or black can be used. It cannot appear in colors other than those shown here. Information about Rotary's color palette can be found on the Brand Center.

ROTARY PUBLIC IMAGE RESOURCES

- **Goal: Increase awareness and understanding of Rotary across all of our districts and around the world.**
 - You can't get the "word out" if everything we say looks and sounds different.
 - Consistency and repetition, starting at the local level, is how we get the word out.
 - There are MANY resources to help you be consistent in your communications!
- **Rotary Brand Center:** www.rotary.org/brandcenter or brandcenter.rotary.org
 - Also accessible from My Rotary under the Manage tab.
 - No longer need to login using rotary.org (My Rotary) credentials.
 - Includes guides, logos, images, ads, customizable templates, videos, and so much more.
- **Brand Guidelines:**
 - Includes the basics for branding: messaging, logos, fonts, colors, imagery, and more.
 - Now only available from Brand Center as web pages.
 - Logos are the most important at this time. All districts and clubs need to use the same template.
- **People of Action campaign**
 - Access customizable templates from Brand Center.
 - Highlight Rotarians doing service projects and the benefits.
 - See online guidelines on Brand Center.
- **Tips and Tricks**
 - ALWAYS use the "new" logo: the word Rotary plus a wheel after it with your club or district name.
 - NEVER use the wheel by itself – it must be used with the official Rotary "word" logo.
 - Never use posed pictures, "grip and grin," or "big check" photos – these do not separate Rotary from other organizations. We want to show people in action in our communities.
 - Make sure photos feature two or more people in action and represent the diversity of your club and community.
 - Make sure your club and district materials ALL LOOK THE SAME, following the Brand Guidelines: It's only through a consistent message and look and feel that we can communicate the brand value of Rotary.
 - ALWAYS include a Call to Action: website URL, email address, phone number, social media page, etc.
- **Where to go for help**
 - Brand Center
 - Your district Public Image Chair
 - Zone Rotary Public Image Coordinator (RPIC) and Assistant Public Image Coordinators (ARPICs)
 - Rotary International: see email addresses on guides

Assistant Governors Session Summary
AG4a: The Rotary Foundation Panel Discussion
March 21-22, 2025

Learning Objectives:

Participants will learn about The Rotary Foundation (TRF) programs and resources from Senior Rotary leaders and The Rotary Foundation staff members. Planned panelists include Past Rotary International Director Drew Kessler, Regional Rotary Foundation Coordinator Joanne Ventura, Assistant Regional Rotary Foundation Coordinator Mary Ellen Bentler, Endowment/Major Gifts Advisor Mary Shackleton, TRF Regional Major Gifts Officer Celeste Herbert and TRF Donor Engagement Specialist Becca Sheehan. After this Session, participants will be able to:

- Identify new ways to communicate the work of The Rotary Foundation to our members.
- Understand the various TRF Programs and Funds.
- Describe the various types of TRF Grants and involve your Club in TRF Grant funding.

Resources: Always sign-in to [Rotary.org/learn](https://www.rotary.org/learn) first to access the Learning Center links!

- [Rotary Foundation Basics](#) course on the Learning Center.
- [Areas of Focus](#) course on the Learning Center.
- [The Power of Giving](#) course on the Learning Center.
- [Conducting Community Assessments](#) PDF download.
- [Developing Effective Projects](#) page on MyRotary.org.
- [Service Project Center](#) page on MyRotary.org.
- [Contribution and recognition reports](#) page on MyRotary.org.
- [The Rotary Foundation Reference Guide](#) PDF download.
- [Every Rotarian, Every Year](#) brochure PDF download.

Key Messages:

- Increased service in your communities, and beyond, can play a significant role in achieving the Rotary Action Plan's strategic priorities of Impact, Reach, Engagement and Adapt.
- The Rotary Foundation provides significant funding opportunities for your Club's projects through District & Global Grants.
- Clubs & Districts should set giving goals for TRF's Annual Fund, PolioPlus Fund, etc. each year.
- Sharing stories of successful TRF funded projects can motivate members to [donate to TRF](#).

Discussion Topics:

- Why does The Rotary Foundation matter to People of Action, including to you personally?
- How can impactful Rotary experiences connect the Clubs you serve to TRF?
- In what ways can you help the Clubs you serve partner/learn from others to expand Rotary's reach via service projects and grants?
- What are effective ways you can encourage your Clubs to celebrate TRF?
- How can you help Clubs adapt their communications to inspire giving to TRF?
- In what ways can you support Club Presidents with their TRF goals?

Notes:

One important thing that I learned to bring back to my assigned clubs: _____

Assistant Governors Session Summary

AG4b: Strategy for the Year Ahead

March 21-22, 2025

Learning Objectives:

A successful year as an Assistant Governor begins with your vision for the Rotary Year ahead. During this hour, participants will begin compiling what they've learned during all the previous sessions into an actionable plan. After this Session, participants will be able to work with their District Governor, District Leadership Team, and leaders of their assigned Clubs to:

- Establish SMART goals that align with Rotary's Action Plan.
- Create a tentative calendar of meetings, events, and timelines for the year.

Resources: Always sign-in to [Rotary.org/learn](https://www.rotary.org/learn) first to access the Learning Center links!

- [Assistant Governor Basics](#) course on the Learning Center.
- [Club flexibility options](#) page on MyRotary.org.
- [Club Types, Formats, and Models](#) download pdf from MyRotary.org.
- [Supporting Your Clubs](#) course on the Learning Center.
- [Rotary's Change Model](#) course on the Learning Center.

Key Messages:

- Setting your own goals for the Rotary Year and working with your assigned Clubs to establish their goals lays the foundation for future, and sustainable, success. There are Rotary Action Plan resources to help you.
- Explain to your assigned Clubs the importance of establishing three-year rolling goals.
- Rotary International provides fantastic resources on the Learning Center and within your own Rotary network that can assist you with planning and goal setting; tap into them.
- Encourage your District Leadership Team to develop and promulgate a tentative calendar for the entire Rotary Year as soon as possible.

Discussion Topics:

- When will you and your Governor visit your assigned Clubs?
- What goals will you want to emphasize? How will you track them?
- How will you work with your assigned Clubs? Regular group meetings with all assigned Club Presidents? Meetings with Club boards?
- What kind of leadership-development activities and Rotary experiences would you like to plan during the year? For your assigned Clubs? For yourself?
- With the buy-in of the District Governor, how will you measure and rate your assigned Clubs at the end of the year? How will you communicate your expectations with your assigned Clubs at the start of the year?
- How will you create a mutual support network and thereby leverage the expertise of your Assistant Governor colleagues?
- How will you promote attendance at District events within your assigned Clubs?

Small Group Activity:

As an Assistant Governor, you should create two SMART goals in planning out your year and share it with your small group. Once you have created your goals you should email them to your DGE so they can be informed of your goals.

Notes:

One important thing that I learned to bring back to my assigned Clubs: _____

ACTION PLAN WORKSHEET

Action Plan Strategic Priorities	Goals	Action Steps	How will you measure the success of these Goals?
Increase Our Impact			
Expand Our Reach			
Enhance Participant Engagement			
Increase Our Ability to Adapt			

ROTARY CITATION / CLUB EXCELLENCE AWARD

GOALS AND INSTRUCTIONS

The Rotary Citation, which will be renamed the Club Excellence Award starting 1 July 2024, recognizes the hard work clubs do throughout the year. Taking action toward achieving the required number of goals helps clubs engage their members, stay relevant in their communities, and run more efficiently. A welcoming and engaging club also reflects the values of Rotary. When clubs work to achieve these goals, they also contribute to the overall health and culture of Rotary for generations to come.

To be eligible for the Club Excellence Award, clubs need to be active clubs in good standing – or having paid each invoice balance in full upon receipt. To verify that your club is in good standing, go to My Rotary>Click on Club Name>Finance>Club Invoice. You should have an outstanding balance of \$0.00. Invoices are due when they are posted, in mid-January and mid-July.

Rotary club leaders can go into Rotary Club Central and select the goals they wish to apply toward the club excellence achievement. This flexibility allows clubs to choose the goals that are most relevant and achievable. In addition, many goals will be self-reported by marking “achieved” in Rotary Club Central. Clubs must achieve at least half of the goals by 30 June to be eligible.

To achieve the Club Excellence Award:

1. Go to [Rotary Club Central](#)
2. Review the available goals
3. Set at least half of the available goals
4. Achieve those goals
5. Report achievement in Rotary Club Central by 30 June.
6. Pay club invoices in full upon receipt

Once you are in Rotary Club Central, go to **Club Goals** on the left side of the page if you are not there already, select the **year**, and click on the **All tab** to see the goals. Eligibility will be determined based on goal achievement as of 30 June.

Enhance Participant Engagement	
Goal	Description
Service participation	How many members will participate in club service activities during the Rotary year?
Rotary Action Group participation	How many club members will be members of at least one Rotarian Action Group (RAG) during the Rotary year?
Rotary Fellowship participation	How many club members will be members of a Rotary Fellowship during the Rotary year?
District conference attendance	How many members will attend your district conference?

District training participation	How many of your club's leaders will attend a learning event to prepare for their role
Leadership development participation	How many members will participate in leadership development programs or activities during the Rotary year?
Social activities	How many social activities will your club hold outside of regular meetings during the Rotary year?
Use of official Rotary promotional materials	Did your club use Rotary International's advertising and public service materials, such as broadcast videos, print ads, and other official materials available in the Brand Center, to promote Rotary in your community during the Rotary year?

Increase our Impact	
Goal	Description
Service Projects	How many service projects will your club complete during the Rotary year?
Inbound Youth Exchange students	How many Rotary Youth Exchange students will your club host virtually or in person during the Rotary year?
Outbound Youth Exchange students	How many Rotary Youth Exchange students will your club sponsor virtually or in person during the Rotary year? ¹
Annual Fund contributions	How much money will be contributed to The Rotary Foundation Annual Fund by your club and its members during the Rotary year?
PolioPlus Fund contributions	How much money will be contributed to The Rotary Foundation PolioPlus Fund by your club and its members during the Rotary year?
Major gifts	How many single outright donations of US\$10,000 or more will be made by individuals associated with your club during the Rotary year?
Bequest Society members	How many individuals or couples will inform The Rotary Foundation of their plans to leave US\$10,000 or more to The Rotary Foundation through their estate?
Benefactors	How many individuals or couples will inform The Rotary Foundation of their estate plans to include the Endowment Fund as a beneficiary or will make an outright gift of US\$1,000 or more to the Endowment Fund?

¹ Any club participating in Rotary Youth Exchange must adhere to RI policies and Rotary Youth Exchange certification standards, and must operate under the direct supervision of the district Rotary Youth Exchange program.

Expand our Reach	
Goal	Description
Club membership	How many total members does your club want by the end of the Rotary year?
New member sponsorship	How many members will sponsor a new club member during the Rotary year?
Rotaract clubs	How many new and existing Rotaract clubs will your club sponsor during the Rotary year?
Interact clubs	How many new and existing Interact clubs will your club sponsor during the Rotary year?
RYLA participation	How many individuals will your club sponsor to participate in Rotary Youth Leadership Awards (RYLA) events during the Rotary year either in person or virtual?
Media stories about club projects	How many media stories will cover your club's projects during the Rotary year?

Increase Our Ability to Adapt	
Goal	Description
Strategic plan	Does your club have an up-to-date strategic plan?
Review club bylaws	Do your club bylaws reflect your members and other participants needs?
Online presence	Does your club's online presence accurately reflect its current activities?
Update website and social media	During the Rotary year, how many times per month will your club's website or social media accounts be updated?

Questions? Read responses to [frequently asked questions](#) for more information.

SMART GOALS



Specific	Measurable	Attainable	Relevant	Time-Bound
Make sure your goals are focused and identify a tangible outcome. Without the specifics, your goal runs the risk of being too vague to achieve. Being more specific helps you identify what you want to achieve. You should also identify what resources you are going to leverage to achieve success.	You should have some clear definition of success. This will help you to evaluate achievement and also progress. This component often answers how much or how many and highlights how you'll know you achieved your goal.	Your goal should be challenging, but still reasonable to achieve. Reflecting on this component can reveal any potential barriers that you may need to overcome to realize success. Outline the steps you're planning to take to achieve your goal.	This is about getting real with yourself and ensuring what you're trying to achieve is worthwhile to you. Determining if this is aligned to your values and if it is a priority focus for you. This helps you answer the why.	Every goal needs a target date, something that motivates you to really apply the focus and discipline necessary to achieve it. This answers when. It's important to set a realistic time frame to achieve your goal to ensure you don't get discouraged.

HOW TO SET A GOAL

For club officers



FIND GOALS TO TRACK

Rotary Club Central

My Rotary English

Club Goals

Choose and set the goals your club will focus on and track.
[Learn how to set and track your club's goals](#)

Rotary Club of **Anytown**

< 2024-25 >

1 goal achieved of 4 selected

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase Our Ability to Adapt

EDIT The goals you select will appear below. To report progress or add, remove, or edit a goal, select EDIT.

★ Priority Goals

Strategic plan ★ Priority
Show goal details and history

Service participation ★ Priority
Show goal details and history

Annual Fund contributions ★ Priority
Show goal details and history

ACHIEVEMENT

PRINT

Before choosing your club's goals, make sure the **appropriate year** is listed

Rotary Club Central

My Rotary English

Club Goals

Choose and set the goals your club will focus on and track progress.
[Learn how to set and track your club's goals](#)

Rotary Club of **Anytown**

< 2024-25 >

1 goal achieved of 4 selected

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase Our Ability to Adapt

SAVE **CANCEL** Which goals will your club track this year? Browse goals by category and select only those you plan to pursue. Then save.

Sort selected goals

★ Priority Goals

Strategic plan ★ Priority
Show goal details and history

Service participation ★ Priority
Show goal details and history

Annual Fund contributions ★ Priority
Show goal details and history

ACHIEVEMENT SELECT GOAL

ACHIEVEMENT GOAL SELECT GOAL

21 OF 25

ACHIEVEMENT (USD) GOAL (USD) SELECT GOAL

0 OF 4,000

Select the goals your club wishes to track by selecting the check boxes next to them

October 2024

SET A GOAL

Rotary Club Central

My Rotary English

Club Goals

Choose and set the goals your club will focus on and track. [Learn how to set and track your club's goals](#)

Rotary Club of **Anytown**

< 2024-25 >

1 goal achieved of 4 selected

All Goals Enhance Participant Engagement Increase our Impact Expand Our Reach Increase our Impact

☒ SAVE ☐ CANCEL Which goals will your club track this year? Browse goals by category and select the goals you plan to pursue. Then save. [Sort selected goals](#)

★ Priority Goals

	ACHIEVEMENT	GOAL	SELECT GOAL
Strategic plan ★ Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Fund contribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ACHIEVEMENT 21 OF GOAL 25 SELECT GOAL ☒

ACHIEVEMENT (USD) 0 OF GOAL (USD) 4,000 SELECT GOAL ☒

Enter a goal value in the box titled **Goal**

Select **Save** after you've entered a goal value

ASSISTANT GOVERNOR CLUB VISIT PLANNER

This list will help you prepare for your club visits. Customize it based on the needs of your clubs and the types of visits you make.

Before each club visit:

- ☐ Review notes and action items from the last visit and your communications with the president.
- ☐ Review the club's goals, achievements, ratings, and comments in Rotary Club Central.
- ☐ Review reports on My Rotary to understand the club's trends in membership, Foundation contributions, and other areas.
- ☐ Read the club's newsletters and its social media feeds to learn how it communicates and confirm that it uses the correct Rotary branding.
- ☐ Review any Action Plan resources or assessments that could help support the club.
- ☐ Ask the governor for any other information you should share with the club.

Add your own tasks:

- ☐
- ☐
- ☐

Reminders and activities for clubs:

- ☐
- ☐
- ☐

Club name:

Notes and recommendations:

ASSISTANT GOVERNOR PREPARATION TIMELINE

Use this timeline, which includes tips from other assistant governors, to prepare before you take office.

January-February

Learn which club and district leaders you'll work with. Try to meet the people who will hold these roles during your term.

District leaders:

- Governor
- Governor-elect
- Governor-nominee
- District committee chairs
- Learning facilitators
- Other assistant governors
- Secretary or executive secretary
- Past district governors

Club leaders:

- Presidents
- Secretaries and executive secretaries
- Treasurers
- Learning facilitators
- Other club officers or committee chairs

February

Meet with the district leadership team to start determining how you'll all work together to support clubs:

- Understand the structure of the team and how its members support club leaders and committees
- Make a plan for communicating within the team
- Discuss district goals with the governor-elect
- Find out whether you'll have a budget for the year
- Decide how online membership leads that are transferred to the district will be managed
- Work with the outgoing assistant governor and the district team to make consistent, realistic, long-term plans for supporting clubs

February-March

Learn how to use Rotary's online tools:

- Resources in My Rotary under the [Knowledge & Resources](#) tab
- [Rotary Club Central](#)
- [Online Membership Leads](#)
- [Service Project Center](#)
- [Brand Center](#)

February-May

Attend learning events, including:

- The district team learning seminar
- The presidents-elect training seminar (PETS)
- The district training assembly

Talk with incoming club presidents during and after PETS to:

- Get to know each of them and set a positive tone for your working relationship
- Help them [create My Rotary accounts](#)
- Encourage them to identify their clubs' needs
- Help them develop or refine their club goals (emphasizing the top-priority goals indicated in Rotary Club Central) and have them enter the goals
- Discuss how the clubs and the district will manage online membership leads

April-June

Schedule your club visits for the year. You should:

- Plan to visit each club, or attend one of its meetings or events online, at least once per quarter
- Schedule your visits in collaboration with your clubs and based on their needs
- Meet with the club presidents monthly, either in person or virtually, to stay current on their successes and challenges

Before July

Talk with the outgoing assistant governor to:

- Learn about each club's successes, challenges, and culture
- Get suggestions for working with these clubs
- Find out what tools the assistant governor used to support clubs and what approaches they found most effective
- Ask if you can observe any of their club visits before your term begins
- Ask how they scheduled their visits

Learn about your clubs' strengths and challenges, and then use that information to help you plan. You should:

- Review their goals, achievements, and ratings in Rotary Club Central
- Review membership, Foundation, club balance, and other reports in My Rotary
- Read your clubs' newsletters and follow their social media accounts
- Assess your clubs based on their operating structure and effectiveness

- Evaluate their strength in areas such as membership, Foundation giving, finances, management practices, and stewardship
- Make sure current club officers have reported the incoming officers through My Rotary or their club management system; if they haven't, remind them that the following year's club officers should be reported by 1 February (Rotary will send a list of club officers that haven't been reported in March)
- Help club officers [create My Rotary accounts](#) if any of them still don't have one
- Work with your district team to create plans for supporting the clubs that need the most attention as well as those that are doing well

During your term

Make sure that you're familiar with Rotary's Action Plan and the latest Rotary initiatives, policies, and resources. You should:

- Become familiar with [Rotary's Action Plan](#)
- Subscribe to [Rotary newsletters](#), including Rotary Leader
- Visit Rotary.org and My Rotary often for [news](#) and [stories](#), and find our videos [on YouTube](#) and the [Brand Center](#)
- Become familiar with the resources on My Rotary
- Refer to [Rotary's governance documents](#) when you work with clubs on matters related to policy; your [Club and District Support representative](#) can also help

CLUB TYPES, FORMATS, AND MODELS



All Rotary and Rotaract clubs share similar values and a passion for service, but each offers a unique experience. When you start a club, you'll need to choose a club type, a meeting format, and a club model. Consider the needs of your community and the club's prospective members to decide which kind of club would be best.

CLUB TYPE: First, determine whether your new club will be a Rotary club, a Rotaract club, or a satellite of a Rotary or Rotaract club.

Club type	Description	Appeals to	Member minimum for new clubs
Rotary club	Professionals and other leaders who meet regularly for service, connection, and personal growth Learn about a successful Rotary club.	People who are looking for friendship, service, and networking opportunities Learn more with the Starting a Club online course.	20 required
Rotaract club	Adults who take action through community and international service while learning leadership skills and developing professionally Learn about a successful Rotaract club.	Younger professionals and university students who want to become more effective leaders, find innovative solutions to community issues, and have fun through service Learn how to start a club .	12 recommended
Satellite club	A part of a Rotary or Rotaract club that has its own meetings, projects, bylaws, and board, managed in collaboration with its sponsor club Learn about a successful satellite club.	Those who want a club experience, meeting format, or meeting time other than what local clubs offer and who appreciate the support and partnership of another club. Some satellite clubs eventually form standalone clubs, while others, sometimes called companion clubs, do not. Learn more in the Guide to Satellite Clubs .	8 for a satellite Rotary club 4 for a satellite Rotaract club

MEETING FORMAT: Next, determine whether your club will meet in person, online, or both.

Meeting format	Description	Appeals to
In person	A club that meets in person at a designated location Learn about a successful club that meets in person.	Those who consider face-to-face interactions an important part of the meeting experience or who don't enjoy online meetings
Online	A club that meets primarily online and offers in-person service opportunities Learn about a successful club that meets online.	Frequent travelers, people who have difficulty attending in-person meetings, or those who prefer an online experience Learn more about online club meetings .

CLUB TYPES, FORMATS, AND MODELS



In person and online	<p>A club that holds some meetings in person and others online, or one that holds in-person meetings that some members attend virtually</p> <p>Learn about a successful club that meets in person and online.</p>	<p>People who have various needs and enjoy a flexible schedule and those who want many attendance options or a mix of experiences</p> <p>Learn more about clubs that meet online and in person.</p>
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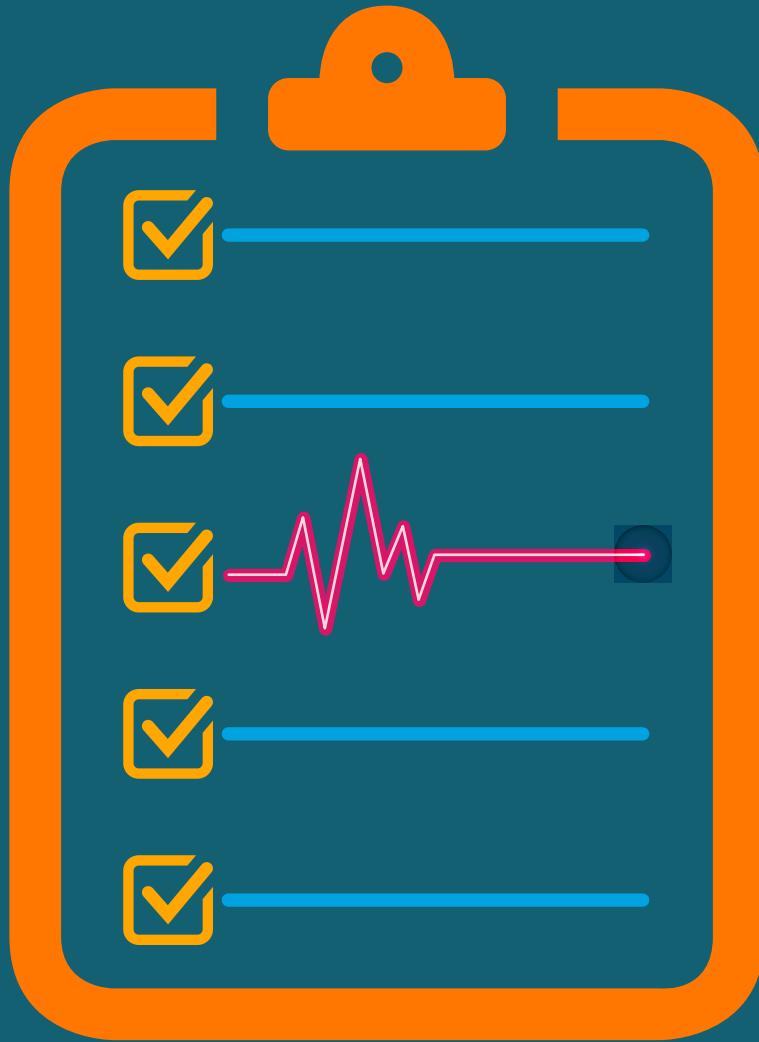
CLUB MODEL: Finally, determine the approach your club will offer. You can choose a model below or design your own.

Club model	Description	Appeals to
Traditional	<p>The club experience includes having a meal, hosting a speaker, and practicing traditions that members value. Traditional clubs often have higher dues because of venue and meal costs.</p> <p>Learn about a successful traditional club.</p>	<p>People who want to socialize over a meal while learning about a new topic or an opportunity to serve the community</p>
Passport	<p>A club that allows members to attend other clubs' meetings frequently if they attend a specified number of home club meetings each year</p> <p>Learn about a successful passport club.</p>	<p>People who travel frequently or who enjoy trying a variety of club experiences and meeting lots of people</p> <p>Learn more in the Guide to Passport Clubs.</p>
Cause-based	<p>A club whose members are passionate about a specific cause and focus their service efforts on that topic</p> <p>Learn about a successful cause-based club.</p>	<p>People who want to connect with others while addressing a particular issue</p>
Interest-based	<p>A club that focuses on a particular interest or hobby</p> <p>Learn about a successful interest-based club.</p>	<p>People who want to enjoy Rotary by focusing on a shared interest or activity, such as professional development</p>
Corporate	<p>A club whose members (all or most of them) work for the same employer</p> <p>Learn about a successful corporate club.</p>	<p>Employees of one organization who want to do good in their community</p>
Alumni-based	<p>A club in which most members (or a majority of charter members) are former Rotary program participants or former Rotaractors or Rotarians</p> <p>Learn about a successful alumni-based club.</p>	<p>People who have previously participated in Rotary International or Rotary Foundation programs, or are former members</p>
Service-based	<p>A club that meets at least twice monthly for service projects and meets occasionally for social events or fundraisers</p> <p>Learn about a successful service-based club.</p>	<p>People who join Rotary to participate in service but who don't want to or can't attend meetings, or those who want a club with lower dues</p>

CLUB TYPES, FORMATS, AND MODELS



Language-based	<p>A club whose members speak a common language other than the primary language of their district</p> <p>Learn about a successful language-based club.</p>	<p>People, such as expatriates, who want to connect with each other using a common language, or people who prefer to connect through that language</p>
International	<p>A club whose members are from different countries than the district where they reside</p> <p>Learn about a successful international club.</p>	<p>People who want to connect with others from all over the world or want a more international club experience</p>
Districtwide online	<p>A club whose members are from anywhere in the district rather than a specific locality, and who meet online. These clubs can function as a temporary club for members exploring different Rotary experiences or a permanent club for those who prefer this format.</p> <p>Learn about a successful districtwide virtual club.</p>	<p>People who want to connect online with others from a larger geographical area, and those who want to volunteer and meet others but may not be able to attend regular meetings in person and fulfill other club membership commitments. This model works well to engage prospective members or re-engage former members and program participants who may want to explore various projects and clubs.</p>



CLUB HEALTH CHECK

Just as routine doctor's visits help us identify health risks before they become serious, a club health check can diagnose problem areas and prescribe remedies. This resource is intended to help club leaders assess their clubs. In using it, you're taking a step to maintain your club's health and preserve its value for members and the community. Mark the boxes next to the statements you consider to be true, based on the past 12 months. Then discuss the results with your fellow club officers. If you left more than five of the boxes in any section blank, that area should be addressed. Act on the suggested remedies for any problem areas you've identified.

YOUR CLUB EXPERIENCE



Members who have a positive club experience are more likely to stay. In turn, they create a positive experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

- ☐ I look forward to attending club meetings and other club activities.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter or greeters who welcome members and visitors to meetings.
- ☐ Our meetings are organized and are run professionally.
- ☐ Members make an effort to meet and talk with different people at each meeting.
- ☐ I've made several new friends in the club.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.
- ☐ We are inclusive in who we invite to our club, how we welcome guests, the topics we discuss, and the service we focus on.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's Avenues of Service and areas of focus, take part in projects, and feel proud to be a part of the club.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members' service, engagement, and donations by nominating them for and presenting them with awards.
- ☐ I have made international connections through Rotary.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ We provide members with flexible meeting opportunities (attending virtually or in person or watching recordings if they miss a meeting).

COMMENTS

**SEE THE NEXT PAGE FOR YOUR
PROGNOSIS AND REMEDIES**





If members are not having a good experience, your club is at risk of losing them. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> + Try something new at a meeting. For example, show one of these inspirational speeches and have a discussion afterward. + Hold online meetings when in-person meetings aren't feasible, or allow some members to connect virtually and others to attend in person. + Find a skilled person in the club or district who can facilitate and run online meetings. + Contact your Club and District Support representative or your regional membership officer for ideas.
Rotary experience beyond the club	<ul style="list-style-type: none"> + Sponsor another Rotaract or Rotary club. + Start or get involved in an Interact program. + Connect members to Rotary's various programs. Sponsor an Interact club, organize a RYLA event, create a scholarship, or start an exchange. + Remind members that they can join a Rotary Fellowship or Rotary Action Group. + Promote district events that are open to all members. Have someone who has attended in the past talk about the experience. + Promote the work that Rotary and Rotaract do both globally and locally, including polio eradication. + Work with your local Toastmasters club to build leadership and communication skills among members. + Visit other clubs to connect with new people and see what they're doing that your club could try.
Unmet expectations	<ul style="list-style-type: none"> + Find out what experience your members want to get out of your meetings by using the Member Satisfaction Survey, and then give them that experience. + Encourage members to develop leadership skills by taking online courses developed by Toastmasters International.

SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons members join and stay involved in Rotary. The healthiest clubs vary their activities and offer a number of ways to get involved. Try a new kind of social event or a different service experience and watch the impact it has on your club.

- ☐ Our club holds regular get-togethers (in addition to club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, friends, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites members of the Rotary family (such as Interactors, Rotary Youth Exchange students, and Rotary Peace Fellows) to participate in meetings and events.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Rotary Youth Exchange student, is involved with New Generations Service Exchange, or organizes a Rotary Youth Leadership Award (RYLA) event.
- ☐ Our club has direct communication with partners, friends, and alumni.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We visit My Rotary Discussion Groups, attend project fairs, or consult The Rotary Foundation Cadre of Technical Advisers to look for ideas and partners before we choose a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input, such as their vocational expertise, on service and social activities.
- ☐ Our club service projects align with Rotary's areas of focus.
- ☐ Our club has applied for or used Rotary Foundation grant funds for a service project.
- ☐ At least one member of our club attends a Rotary Foundation grant management seminar each year.
- ☐ Our club contributes to The Rotary Foundation.
- ☐ Our club has a Rotary Foundation committee chair and a service projects committee chair.

COMMENTS



Clubs that have inadequate social or service opportunities are at risk of losing members who don't feel connected or empowered. The good news is that these deficiencies can be remedied in fun and rewarding ways. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> + Sponsor an Interact club, organize a RYLA event, create a scholarship, start an exchange, join a Rotary Action Group, or support the Rotary Peace Centers. + Let members know about Rotary's exchange programs.
Quality of projects	<ul style="list-style-type: none"> + Use Community Assessment Tools and A Guide to Global Grants to improve the quality of your projects. + Connect with your Cadre advisers to get guidance on service projects. + Evaluate your club's service projects to determine if repeating them is worth the effort.
Social activities	<ul style="list-style-type: none"> + Put one or two members in charge of organizing socials throughout the year. + Join a Rotary Fellowship. + Find or create a variety of events with different times or formats.
Leadership	<ul style="list-style-type: none"> + Help your members develop and practice their leadership skills. Promote the Learning Center's professional development catalog. + Give new and young members leadership roles.

MEMBERS



A healthy club is one that is growing and changing. Having members with diverse perspectives and backgrounds will fuel innovation and give your club a broader understanding of your community's needs. Pay attention to how your members are feeling about the club. Research shows that one of the most common reasons members leave is that club leaders are not open to new ideas. Involving members and giving them a voice in their club's future will strengthen both the club and members' commitment to Rotary. Consult your club's membership profile in Rotary Club Central for the most recent statistics.

- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in members who represent diverse groups.
- ☐ Our club represents the racial or ethnic diversity of our community.
- ☐ Our club seeks to attract members from professions in the community that are underrepresented in the club.
- ☐ New members are officially inducted and are given an orientation, informational materials, and opportunities to get involved.
- ☐ Our club actively engages Rotary alumni (former Rotaractors, Rotary Youth Exchange students, Rotary Peace Fellows, and participants of other Rotary programs).
- ☐ Our club shows its appreciation of each member's unique contributions.
- ☐ Our club retains at least 90% of its members each year.
- ☐ At least 75% of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ A designated person checks and follows up on membership leads assigned to our club.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.
- ☐ Our club has a membership committee whose chair and members are dedicated to attracting and engaging club members.
- ☐ Members attend district events and seminars on Rotary topics that interest them.

COMMENTS



Clubs that have deficiencies in membership are at risk of becoming outdated, dull, and less valuable to their members and community. Fortunately, there are many tools available that are proven to give results. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> + Attract a wide array of members by using Diversifying Your Club: A Member Diversity Assessment. + Learn about Rotary's Commitment to Diversity, Equity, and Inclusion and related efforts.
Professional diversity	<ul style="list-style-type: none"> + Expand the skill sets of your members by recommending professional development courses.
Stagnant or declining membership	<ul style="list-style-type: none"> + Create a membership development plan. + Learn how to connect to prospective members and manage your membership leads in one place. + Target prospective members using this exercise. + Teach members your club's process for proposing new members and explain that they can also refer qualified prospects to other clubs. + Make sure that members are aware of all the ways they can be involved with Rotary besides through attending club meetings.
Members leaving	<ul style="list-style-type: none"> + Start with the Enhancing the Club Experience: A Member Satisfaction Survey to improve current members' experience. + Learn and act on trends using the Improving Your Member Retention: A Retention Assessment and Analysis. + Use the exit survey in Understanding Why Members Leave to consider the reasons your club can address. + Let resigning members know they can rejoin or change clubs when they are ready and stay in touch in the meantime. + Encourage Rotaractors to consider dual membership.
Orientation and Rotary knowledge	<ul style="list-style-type: none"> + Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center.

IMAGE



Clubs that have fun and make an impact are more enjoyable for members and more attractive to potential ones. A positive public image improves your club's relationship with the community and prospective members. Make sure your club is getting credit for the service it provides. Demonstrating that your club meets real needs confirms your value to your community.

- ☐ We have a public-facing, visually appealing club website that explains what the club does, who its members are, and the benefits of membership.
- ☐ We have social media accounts that show our followers the difference we make in our community.
- ☐ Our social media accounts reach a range of audiences.
- ☐ Our club appeared in the local media several times last year.
- ☐ We promote our club and Rotary through various media in the community (television, radio, billboards, etc.).
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's brand guidelines.
- ☐ We use materials and templates from Rotary's Brand Center that show our members as people of action.
- ☐ We use marketing materials from Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary or Rotaract signs and banners at our meeting place, service project sites, and events.
- ☐ Our club's presence is known in our community.
- ☐ The club brochure we give to community members and prospects shows the impact we make.
- ☐ Our club has members who have marketing expertise.
- ☐ We build Rotary's public image by making sure our guests and the public have positive experiences with our club.
- ☐ Our club has a public image committee whose chair and members are dedicated to public image and outreach.

COMMENTS



Clubs that don't have a visible presence in their community are at risk of minimizing their impact or being perceived as irrelevant. Rotary has resources that can help. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> + Find resources in Rotary's Press Center and use them in your community's media. + Plan events to raise community awareness of Rotary. Use the events guide in Rotary's Brand Center.
Outdated materials	<ul style="list-style-type: none"> + Find editable club brochures and membership materials in Rotary's Brand Center. + Follow the Visual and Voice Guidelines in any materials your club creates. + Use Rotary videos and images of your members in your materials.
Online presence	<ul style="list-style-type: none"> + Find a member with the skills and time to create and manage your club website and social media pages. + Take the course The Rotary Brand in the Learning Center. + Use Rotary videos and images and videos of your own members. + Use Rotary's Social Media Toolkit to update your digital presence.
Marketing expertise	<ul style="list-style-type: none"> + Find tips in Club Public Image Committee Basics and put members with public relations expertise on the committee. + Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. + Refresh your club's social media presence using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



When your club runs smoothly, it's likely that you have good leaders who are thinking about the club's future. The leaders shape the club, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development, strategic planning, and succession planning are also ways to fortify your club.

- ☐ Our club has a strategic plan that we update regularly.
- ☐ We set annual goals and enter them in Rotary Club Central.
- ☐ Our club strives for and often earns the Rotary Citation.
- ☐ Our club board meets at least quarterly to review our strategic plan, measure our progress toward goals, and adjust bylaws and other documents as needed.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes identifying future club leaders and preparing them for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends the presidents-elect training seminar (PETS), and club leaders attend the district training assembly.
- ☐ Club leaders use My Rotary or integrated club management software to conduct Rotary business.
- ☐ Our club elects incoming officers by 31 December and reports them to Rotary International no later than 1 February.
- ☐ Our club secretary reports new members within 30 days after they join.
- ☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.
- ☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.
- ☐ We ask our members to complete a member satisfaction survey each year and use the results to shape the club.
- ☐ More than half of our club's members have a My Rotary account.
- ☐ Our club has a club administration committee chair.

COMMENTS



Clubs that don't have skilled members in leadership roles or that neglect members' needs risk becoming ineffective and obsolete and losing their members as a result. There are plenty of remedies for clubs that want to thrive. Look at the boxes you left blank and consider trying those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Planning and goal setting	<ul style="list-style-type: none"> + Create a vision for your club and set long-range and annual goals using the Strategic Planning Guide. + Strive to achieve more than half of the goals in Rotary Club Central to earn the Rotary Citation. + Rotaract clubs should use the Citation Goals and Instructions worksheet. + Select goals that are meaningful not just to the club's board but to the club as a whole. + Use Strengthening Your Membership to make a membership development plan.
Innovation	<ul style="list-style-type: none"> + Update your club bylaws to include new membership types, such as family memberships. + Review the Club Types, Formats, and Models resource to review the experience your club strives to offer its members.
Processes	<ul style="list-style-type: none"> + Develop standard processes for inducting and orienting new members, following up with prospective members, proposing a new member, leadership continuity, etc. + Use the member satisfaction survey.
Leadership	<ul style="list-style-type: none"> + Find tips and resources in online learning plans for club leaders. + Offer leadership development opportunities and promote self-paced learning with Rotary's online professional development courses.
Managing funds	<ul style="list-style-type: none"> + Take the Club Rotary Foundation Committee Basics online course to learn about giving options. + Find best practices in Club Treasurer Basics.
Managing your club on MyRotary	<ul style="list-style-type: none"> + Use the Club Administration section of My Rotary to get reports; add, edit, or remove a member; pay your club invoice; and track your membership leads. (Note: For Rotaract, only club presidents can use the Club Administration page on My Rotary.)

WHAT'S NEXT?



Using the Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most marks and which had the fewest. Look at the suggested remedies and take action. When you visit your doctor, you may get advice about maintaining your good health or possibly a prescription or two to combat an ailment. If you don't follow the advice or take the prescriptions, you aren't making the most of your visit. Similarly, to make the most of your club health check, use the suggested resources to treat your problem areas.

Paul Harris said, "May our happiness increase with our usefulness." As our communities and their needs change over time, clubs have to adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.

NEXT STEPS

1. Score each section. Each mark is worth one point.

Category	Score
Your club experience	
Service and social events	
Members	
Image	
Business and operations	

2. Look at the categories with the lowest scores. How can your club turn the suggested remedies into action? Enter your next steps below.

Action	Time frame	Person responsible

FEATURED RESOURCES

[Club Planning Assistant](#)

[Membership Assessment Tools](#)

[Membership resources](#)

[Brand Center](#)

[Learning Center](#)

