

2021 LONE STAR P.E.T.S. Virtual



SERVE TO CHANGE LIVES

February 22 - 27, 2021

PRESIDENTS-ELECT/PRESIDENTS-
NOMINEE WORKBOOK

Goal: To prepare incoming Club Presidents to become leaders of Vibrant Rotary clubs

Dear Rotary Club Leaders,

Congratulations on your selection as the 2021 President and President-Elect of your Rotary Club or your Rotaract Club.

Our goal at Lone Star P.E.T.S. is to assist you in the preparation for your presidential year. You are already off to a good start by attending Lone Star P.E.T.S. However, we cannot be your only training resource. We encourage you to incorporate the following learning opportunities in your preparation.

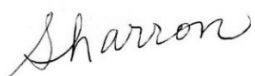
1. Reach out to the former Presidents in your club. They can assist you as mentors.
2. Develop a good relationship with your Leadership Team. Working together you can develop a continuity of programs and goals for your club.
3. Participate in each of your district's various training sessions and events. You will develop a broad knowledge of the many Rotary programs in which your club members may wish to participate.
4. Visit other clubs and see how they operate. Every Rotary club is different. You may see how other clubs solved a problem your club might be facing.
5. View the Learning Center training videos on the Rotary International website.

This workbook is the product of many volunteer hours. After numerous planning sessions with your District Governors Elect, Curriculum/Training Chair PDG Mary Ann McDuff and PDG Robert 'Bob' Greenstreet, have put together an outstanding program from which you may use to learn and plan. Please thank them. It was truly a labor of love.

I encourage you to take full advantage of this learning experience. Develop relationships with your fellow Rotary leaders. Ask questions of your facilitators. Visit the vendors and exhibitors in the House of Friendship. Be inspired by our speakers. Complete the evaluations.

May the next two years be your best years in Rotary yet. And, most importantly, HAVE FUN!!!!

Yours in Rotary,



PDG Sharron Miles
2021 Operating Chair
Lone Star P.E.T.S., Inc.

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Lone Star P.E.T.S. 2021

P R E S I D E N T S - E L E C T / P R E S I D E N T S - N O M I N E E W O R K B O O K

TUESDAY, FEBRUARY 23, 2021

MODULE A-1

BECOMING A VIBRANT CLUB LEADER

GOAL

Club Presidents and Presidents-Elect will have an enhanced view of their role and function as club key leaders of Vibrant Rotary Clubs.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Identify district and RI resources available to help the Club President identify and manage risk factors affecting a club
2. Explain how the Club President can support the structure of a vibrant Rotary club including collaborative efforts with the Club President-Elect
3. List specific responsibilities of the Club President and Club President-Elect
4. Discuss the importance of a strong leadership team and committee structure in building a vibrant and impactful Rotary Club.
5. List specific elements of an engaging and successful Club experience at a vibrant and impactful Rotary Club.

REFERENCE MATERIALS

Lead Your Club: President -- Introduction; Your Job As Club President
Lead Your Club: President -- Chapter 2: Leading Rotarians
Lead Your Club: President -- Chapter 3: Running Your Meetings
Rotary Basics

CREATING YOUR CLUB LEADERSHIP PLAN



Use this worksheet to start developing a plan that works for your club.
Add strategies to meet **your club's needs**.

Rotary Club of

Rotary Year

- ☐ Our club has a strategic plan that reflects what we want our club to be like in three to five years
- ☐ Our club is engaging. We use the following meeting formats:
 - ☐ Traditional meetings: /month
 - ☐ Online meetings: /month
 - ☐ Service meetings: /month
 - ☐ Social events: /month
 - ☐ Other:
 - ☐ Other:
- ☐ Our club ensures continuity:
 - ☐ Members prepare for leadership positions
 - ☐ Past, present, and future leaders participate in making decisions
- ☐ Our club has fun social activities planned for the year:
 - ☐ Networking and socializing events
 - ☐ Events that welcome families
- ☐ Our club has a comprehensive training plan that includes:
 - ☐ District conference
 - ☐ District membership seminar
 - ☐ District public image seminar
 - ☐ District Rotary Foundation seminar
 - ☐ New member orientation
 - ☐ Online courses on the Learning Center
 - ☐ Club Officers Basics course
 - ☐ Membership online course
 - ☐ Presidents-Elect training seminar

- ☐ Our club has entered its annual goals in Rotary Club Central
- ☐ Our club has a communication plan for members and for the community:
 - ☐ We use social media tools like Facebook
 - ☐ Our club website is active and current
 - ☐ Other:
 - ☐ Other:
 - ☐ Other:
- ☐ Our **club's bylaws are current and** reflect our structure and practices
- ☐ Our club has strategies for keeping all members active in the club:
 - ☐ Members are involved in projects
 - ☐ New members are assigned mentors
- ☐ Our club has committees that support our needs:
 - ☐ Administration
 - ☐ Membership
 - ☐ Public relations
 - ☐ Rotary Foundation
 - ☐ Service
 - ☐ Other:
 - ☐ Other:
 - ☐ Other:

Newsletters

Our newsletters help you stay current on the topics that interest you most. Anyone can subscribe once they create an account and sign in. To get started as a new subscriber, or to make changes to your existing subscriptions, click the button below.

MANAGE SUBSCRIPTIONS

End Polio Now

An update about Rotary's polio eradication efforts that includes inspiring stories and the latest statistics.

Giving & Grants

Information to help you support Rotary's work through contributions and grant-funded activities.

Membership Minute

Rotary stories and the latest membership development ideas, strategies, and resources.

Peace in Action

A forum for the Rotary Peace Centers community.

Rotary Convention

News, updates, and deadline information about Rotary's annual convention.

Rotary Leader

Practical information to help club and district leaders achieve success.

Rotary Service

Information to help Rotary members plan effective and inspired service projects.

Rotary Weekly

An update on news and information for Rotary members, as well as developments from around the Rotary world.

Rotary Youth Exchange

Information and updates on current Youth Exchange events and resources.

The Rotarian Newsletter

Highlights from this month's issue of The Rotarian magazine.

Training Talk

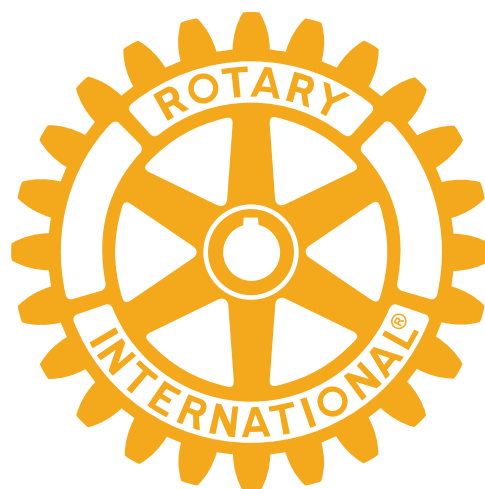
The latest RI training news, including RI mailings, RI Board decisions that affect training, and training tips.

Vocational Service

News and resources related to vocational service.

Young Leaders in Action

News and developments about Rotary's youth and young adult programs: Interact, Rotaract, and RYLA.



ROTARY TRAINING EVENTS

ROLE-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR-ELECT

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Team Training Seminar February	Assistant governors and district committee leaders learn about their roles and set goals with the district leadership team.	District training committee	Trainers Assistant governors Committees
Presidents-elect Training Seminar (PETS) February or March	Club presidents-elect learn about their role, and work with assistant governors to set goals.	District training committee	Trainers Presidents
District Training Assembly March, April, or May (after PETS)	Club presidents-elect develop leadership skills; other incoming club leaders learn about their roles; together, club leaders set goals.	District training committee	Trainers Presidents Secretaries Treasurers Committees

TOPIC-BASED TRAINING EVENTS CONVENED BY THE GOVERNOR

TRAINING EVENT AND TIME OF YEAR	AUDIENCE AND PURPOSE	ORGANIZER	LINKS FOR:
District Vibrant Club Workshop Determined by district	Club presidents, club membership committee chairs, club Rotary Foundation committee chairs, and interested Rotarians learn how membership, the Foundation, and public image work together to help fulfill Rotary's Action Plan.	District Rotary Foundation committee District membership committee District public image committee District training committee	Trainers
Grant Management Seminar Determined by district	Club presidents-elect (or appointees) learn how to manage Rotary grants.	District Rotary Foundation committee District training committee	Trainers (for in-person seminars) Trainers (for online seminars) Participants
Rotaract Club Officer Training Anytime after club open elections and before 30 June	Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.	District Rotaract representative	Trainers Participants

Module A-1: Becoming A Vibrant Club Leader

Breakout Room Questions

1. What excites you most about your presidential year?
2. What is your biggest concern for the next year?
3. Refer to Be a Vibrant Club framework. How do collaborative efforts between a President and President-Elect strengthen a club?
4. Open your LYC to pp. iii-iv of Introduction: Circle the three most important responsibilities: share the reasons (PNs use p. iii; PEs use p. iv).
5. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
6. What is your **primary takeaway** from the Vibrant Club Leader session?
7. Any other question(s)?

This image shows a full page of blank, lined paper. It features approximately 20 horizontal blue lines spaced evenly across the page, typical of notebook or legal stationery. The lines are thin and extend from the left edge towards the right. There is no handwriting, printed text, or other markings on the page.

Lone Star P.E.T.S. 2021

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

WEDNESDAY, FEBRUARY 24, 2021

MODULE A-2 STRIVING TO BE A VIBRANT ROTARY CLUB

GOAL

Club Presidents and Presidents-Elect will have tools to develop plans for building multiple-year momentum.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Outline the goal planning process for setting goals and developing action plans for the club
2. Explain the benefits of strategic planning in maintaining a vibrant club
3. Describe how to use the Rotary Citation in preparation for using Rotary Club Central

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 1: Planning Your Year

HOW TO ACCESS ROTARY CLUB CENTRAL

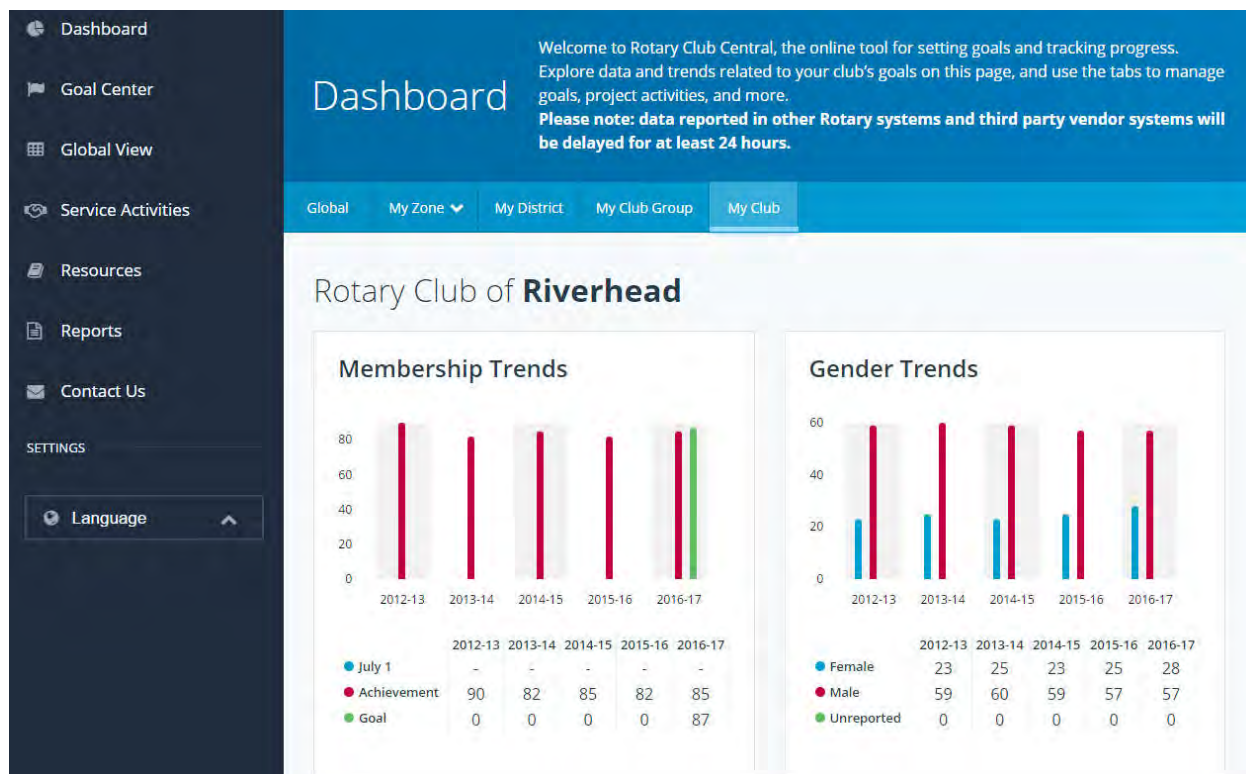


1 Go to My Rotary and select **Sign In** or **Register**. Or go to rotary.org/clubcentral to reach the site directly. You'll be prompted to sign in to My Rotary or create an account if you haven't already.

2 Select **Member Center**

3 Select **Rotary Club Central**

A screenshot of the Rotary website's sign-in page. The page has a dark blue header with the Rotary logo and navigation links like "Foundation", "News & Media", and "Member Center". The "Member Center" link is highlighted with a red box. Below the header, there are two main buttons: "SIGN IN TO MY ROTARY" and "REGISTER FOR AN ACCOUNT". On the left, there is a "SIGN IN" section with fields for "SIGN-IN EMAIL" and "PASSWORD", and a "SIGN IN" button. Below this, there is a "WHY CREATE AN ACCOUNT?" section. At the bottom, there are three columns: "JOIN US!", "ROTARY GLOBAL REWARDS", and "INTERNATIONAL CONVENTION". The "ONLINE TOOLS" section is also visible, with "Rotary Club Central" highlighted by a red box.



CITATION GOALS AND INSTRUCTIONS



To be eligible for the Rotary Citation, clubs need to begin the year as active clubs in good standing – or having paid each invoice balance in full upon receipt. To verify that your club is in good standing, check your daily club balance report under Club Administration > Club Finances. 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 at least 13 out of 25 goals they wish to apply toward citation 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.

To achieve the citation:

- Go to Rotary Club Central
- Review the 25 available goals
- Select at least 13 goals (or more than 50% of the available goals)
- Achieve those goals
- Report achievement in Rotary Club Central

Once you are in Rotary Club Central, navigate to the Goal Center, select the year, and click on the All tab to see the goals.

Goal	Goal Detail
Club membership	How many total members does your club want by the end of the Rotary year?
Service participation	How many members will participate in club service activities during the Rotary year?
New member sponsorship	How many members will sponsor a new club member 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?
Leadership development participation	How many members will participate in leadership development programs or activities during the Rotary year?
District conference attendance	How many members will attend your district conference?
Rotary Fellowship participation	How many club members will be members of a Rotary Fellowship during the Rotary year?
District training participation	How many of your club's committee chairs will attend the district training assembly?
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?

CITATION GOALS AND INSTRUCTIONS



Goal	Goal Detail
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?
Service projects	How many service projects will your club complete 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?
Inbound Youth Exchange students	How many Rotary Youth Exchange students will your club host during the Rotary year?
Outbound Youth Exchange students	How many Rotary Youth Exchange students 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?
Strategic plan	Does your club have an up-to-date strategic plan?
Online presence	Does your club's online presence accurately reflect its current activities?
Social activities	How many social activities will your club hold outside of regular meetings during the Rotary year?
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?
Media stories about club projects	How many media stories will cover your club's projects 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?

STRATEGIC PLANNING GUIDE



ROTARY'S VISION STATEMENT

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

ABOUT THIS GUIDE

Just as a map guides people from one location to their destination, a strategic plan that is rooted in action guides an organization through achieving its goals and, ultimately, fulfilling its strategic vision. Strategic plans are important for Rotary and Rotaract clubs, too. Our survey results have shown us that clubs that develop and follow a strategic plan are stronger than clubs that don't because they have more satisfied members who view their clubs and Rotary more positively overall.

Use this Strategic Planning Guide to help you set long-term priorities as well as annual goals that support your club's strategic vision. This guide is designed for Rotary and Rotaract clubs, but districts may also find it useful.

STRATEGIC PLANNING PROCESS OVERVIEW

PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?	PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?	PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?	PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?
<ul style="list-style-type: none">• Identify strategic issues to address• Determine club's strengths and weaknesses• Assess member satisfaction and needs• Identify opportunities and challenges in the community	<ul style="list-style-type: none">• List five to seven characteristics you want your club to have• Create a vision statement	<ul style="list-style-type: none">• Set strategic priorities• Set annual goals• List the activities, timeline, and resources you'll need	<ul style="list-style-type: none">• Monitor progress toward your annual goals• If you missed your targets, determine why• Adjust your action plans

GETTING STARTED

- Assemble a strategic planning team made up of past, present, and incoming club leaders to develop the plan and make sure it's helping your club achieve its goals.
- Ask a non-Rotarian/Rotaractor or a club member that is not in a leadership position to facilitate strategic planning meetings.
- Get a variety of perspectives by involving club members who have diverse backgrounds and experiences.
- Make sure your club's vision reflects Rotary's official strategic vision.
- Align your club's goals to reflect those of your district and Rotary's [strategic plan](#).

PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?

Before you set your club's long-term goals, it's important to:

- Determine your club's strengths and weaknesses by gathering comments from members
- Identify opportunities and challenges in the community by meeting with other community leaders

IDENTIFY STRATEGIC ISSUES

What are the critical issues or concerns that your club wants to address? Strategic issues are those critical unknowns that are driving you to embark on a strategic planning process. These are issues that are looking for a solution or decision. Think about what issues you want to address with this strategic plan.

Potential questions to ask your members:

- How will we increase our membership and engage members in our club?
- How can we attract a diverse group of members?
- How can we include more community members in our club activities?



Reviewing your club's past strategic plans and using the [Rotary Club Health Check](#) can help give you direction.

STRATEGIC ISSUES

STRENGTHS AND WEAKNESSES

List what your club does well and what your club could improve.

STRENGTHS

WEAKNESSES



TIP

Use the member satisfaction survey in [Enhancing the Club Experience](#) to get your members' insight and help you identify your club's strengths and weaknesses.

IDENTIFY OPPORTUNITIES AND CHALLENGES IN THE COMMUNITY

List the opportunities in your community that your club can act on. Maybe it's finding more members from a growing demographic group. Or mentoring entrepreneurs to help them develop their businesses. Also list the challenges in your community that your club can help address, such as unemployment or quality of education.

OPPORTUNITIES

CHALLENGES

PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?

CLUB CHARACTERISTICS

Rotary’s vision statement asks us to “unite and take action to create lasting change.” List five to seven characteristics you want your club to have within three to five years that will help realize that vision, e.g. fun, service-oriented, innovative, representative of the community, etc.

CHARACTERISTICS

VISION STATEMENT

A vision statement defines your desired future and provides direction for what you want your club to be. Write a one-sentence vision statement with your strategic planning team using the list of club characteristics as a reference.

Potential questions to consider:

- What will our club look like in three to five years?
- How will we know we’ve succeeded?
- What do we want to achieve?

TIP



Your vision statement should resonate with club members. One example could be: “Our vision is to be recognized as the service club that supports youth in our community.”

VISION STATEMENT

PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?

STRATEGIC PRIORITIES

Your strategic priorities should help you achieve your vision. These priorities answer the question, “How will we succeed?” Develop your most important strategic priorities — those that will have the biggest impact as your club works toward its vision.

Consider the following when you develop strategic priorities:

- The Rotary vision statement and [strategic plan](#)
- Your club’s strengths and weaknesses
- Your district’s goals
- Your community’s opportunities and challenges
- Your club members’ opinions
- What you can achieve in three to five years

STRATEGIC PRIORITIES

ANNUAL GOALS

When you have set your strategic priorities, you can develop yearly goals that support them. Write down your strategic priorities. Then list your annual goals, along with the actions you’ll take, the resources you’ll need, and who will lead the effort to meet each goal. Set a timeline for each. [Rotary Club Central](#) can also assist you in setting goals and tracking achievements.



TIP

Effective goals clearly state what, when, how, and who. They are also measurable.



STRATEGIC PRIORITY 1: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

STRATEGIC PRIORITY 2: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

STRATEGIC PRIORITY 3: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

STRATEGIC PRIORITY 4: _____

ANNUAL GOALS	ACTIONS	RESOURCES NEEDED	MEMBER ASSIGNED	TIMELINE

PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?

MONITOR PROGRESS

You'll need to track progress toward your annual goals with your strategic planning team and suggest changes to action plans if needed. You may want to try a new approach or allocate more resources to your goals.

Consider the following when monitoring progress:

- How often should we measure progress toward our goals?
- How should we communicate our progress to club members?
- Who should approve changes to action plans or annual goals?



TIP

Rotary Club Central
can assist you in
tracking progress
toward your goals.

GOAL PROGRESS REVIEW PLAN

REVIEW AND ADJUST

As you review the progress you've made, list your goals, including any goals that were not met and the reasons why. Determine what adjustments or actions should be taken to achieve those unmet goals.

Consider the following when identifying and listing your missed targets:

- What goals were met?
- What goals were not met?
- What are the top reasons we fell short of those goals?
- What adjustments need to be made to help us achieve those goals?

STRATEGIC PRIORITY 1: _____

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

STRATEGIC PRIORITY 2: _____

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

STRATEGIC PRIORITY 3: _____

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

STRATEGIC PRIORITY 4: _____

ANNUAL GOALS	MET OR UNMET	REASONS FOR UNMET GOALS	ADJUSTMENTS TO ACTION PLAN

Message from the Strategic Planning Committee

By Stephanie A. Urchick, RI Director and Former Chair of the Strategic Planning Committee

When we began developing a new strategic plan for Rotary over two years ago, we started by taking a look in the mirror. We asked hard questions as we performed a thorough self-assessment, all the while acknowledging the changing world around us. Once we identified gaps between who we are and who we need and want to be, we looked to you. We asked more than a million people from across the world to share their input with our Strategic Planning Committee through focus groups and surveys. Each goal in our plan is based on feedback from leaders, members, and Rotary participants who want the organization to achieve its vision. Thank you for sharing your passion and insight—we heard you!

Our new strategic plan is different from our past plans. This will be our Action Plan—our organization’s call to action to work together to build a stronger future. This plan will help us realize what’s truly possible when People of Action unite, connect with others who share our values, and commit to creating change in the world and within ourselves.

Our Action Plan is not about wiping away our tradition or tried-and-true core principles. It’s about making our organization stronger so that our values will last for years to come. It’s about using effective tactics to strengthen the organization at all levels. It’s about ensuring that every person who engages with us has a meaningful, valuable and fulfilling experience. It’s about changing more lives and communities for the better.

We are committing ourselves to increasing our impact on the world, expanding our reach, enhancing the experiences and engagement of Rotary participants, and increasing our ability to adapt and be innovative. Over the next several years, we will be exploring, implementing and refining a series of initiatives designed to achieve these goals. While the Action Plan focuses on Rotary International and the corporate-level activities that will drive us toward our vision, much of it also translates to a club and district level.

What does this mean for you? Each club should have the same priorities as the Action Plan. What can you do to help reach these goals? Take into consideration the priorities and ideas in this plan. How can you make your club and the experiences of its members the best it can be?

After considering how your club can have the most impact, use the [strategic planning guide](#) as your toolkit. Use the priorities and tips to develop your own plan of action, align with our priorities and support our shared goals. Tailor your plan so that it is the most effective for your club and engages your members and the members of your community. We will be audacious and innovative in how we implement Rotary’s Action Plan and we encourage you to be the same.

You helped build this Action Plan and we will use it to strengthen Rotary so that together, we can act boldly to help make the world better for generations to come.



ROTARY'S VISION STATEMENT

TOGETHER WE SEE A WORLD
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 next five years.

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

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 CORE VALUES

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

FELLOWSHIP
INTEGRITY
DIVERSITY
SERVICE
LEADERSHIP

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.



rotary.org/strategicplan



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



A bold Action Plan sets Rotary's course for the future

COVID-19 has turned our world upside down and impacted us all in different ways, but we are still united, still connected, and guided by an Action Plan that focuses our work and prepares us for a stronger future. Rotary has quickly adapted to the times, with members finding new ways to respond to this pandemic through connections, action, and service.

— Rotary International General Secretary John Hewko

In 2019-20, Rotary marked its 115th year — a testament to the staying power of our unique model of service and leadership. To guide our future and build upon our legacy, we launched [Rotary's Action Plan](#), a strategy to fulfill our shared vision for the organization.

The COVID-19 pandemic has altered our lives and communities, but, together, we're adapting and finding solutions to stay connected and help those affected by the coronavirus. It's a perfect example of how we're implementing the four priorities of our Action Plan: **increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.**

And while clubs continue to connect with their members and communities, Rotary International staff remain committed to supporting Rotarians, Rotaractors, clubs, and districts. From providing resources so clubs can still operate to making personal connections to help club and district officers, engaging with our members continues to be our primary priority.

Approximately 1.2 million Rotarians in 36,000 Rotary clubs, serving together with over 200,000 Rotaractors in more than 10,000 Rotaract clubs.

INCREASE OUR IMPACT

Through the progress we've made in the fight to end polio and the expansion of our grant programs and fundraising efforts, Rotary continues to make a difference in the world. To increase our impact, however, we must establish systems to identify and measure our results, learn from our successes and failures, and build on our partnerships.

Assigning value to Rotary's global impact

What is the true value of Rotary's work? Our efforts have been historically hard to quantify, but two leading institutions helped us begin to get answers:

- The Johns Hopkins Center for Civil Society Studies [estimated that Rotary members volunteered](#) nearly 47 million hours in a typical year. If communities had to pay for the services Rotary provides, that figure would translate into \$850 million.
- Harvard University estimated that Rotary clubs contributed \$1.15 billion in cash to charitable activities in their local communities in 2018. This is in addition to contributions made to The Rotary Foundation.

By using innovative measurement tools, Rotary can better understand and measure our inputs, outputs, and outcomes, and begin to quantify and maximize the wide-reaching impact of our efforts.

The Rotary Foundation as a tool for change

The number of Rotarians and clubs contributing to the Foundation increased this year, providing more support for our causes, including the areas of focus, polio eradication, and disaster response. We redesigned the Rotary Direct landing page to make it easier for donors to enroll in recurring giving. As of April, we've raised \$336 million. If contributions during the last few months of the Rotary year are as strong as in past years, we'll meet our \$400 million fundraising goal.

This year, we renewed our long-standing fundraising partnership with the Bill & Melinda Gates Foundation, which generates \$150 million annually for polio eradication. Rotary aims to raise \$50 million a year for PolioPlus over the next three years, with each dollar to be matched with an additional two dollars by the Gates Foundation.

Doing good through Rotary grants

Responsive and innovative grant programs have inspired greater rates of participation, leading to more opportunities for members to help communities.

Global grants spending is at an all-time high, with 1,344 grants approved this Rotary year, totaling over \$104 million (as of 1 June). Since we launched the

global grants program in 2013, the number of approved global grants has risen more than 55%, while the average global grant award amount has increased by 42% percent.

In response to COVID-19, The Rotary Foundation released \$3 million to the Disaster Response Fund. And, with additional contributions from our donors, as of 1 June, 207 districts have received more than \$5.1 million in grant funding to provide critical aid to communities impacted by the virus.

We also introduced [**programs of scale grants**](#) — one grant of up to \$2 million is awarded each year. Each grant will support a large-scale project, lasting three to five years, that benefits a large population in a significant geographic area. Programs of scale grants align with at least one of Rotary’s areas of focus and require sustainable, evidence-based action and measurable outcomes for impact.

Investing in peace education

More than 1,350 peace leaders have graduated from a Rotary Peace Center since 2002, earning master’s degrees or professional certificates in peace and development studies.

Recognizing a need for professional peacebuilders who are trained and knowledgeable about the underlying causes of conflict in sub-Saharan Africa, Rotary announced its [**first Rotary Peace Center in Africa**](#), established at Makerere University in Kampala, Uganda. Courses will begin in 2021 and rely on regional expertise and the experiences of people affected by conflict.

The power in our partnerships

Working toward peace is an underlying tenet of each service project Rotarians undertake, and this year, with our partner the [**Institute for Economics and Peace \(IEP\)**](#), we launched the Rotary Positive Peace Activator Program. We are training peacebuilders and developing a network of 150 Positive Peace Activators in six regions to support Rotarians in building lasting peace in their communities.

Our decade-long [**water, sanitation, and hygiene \(WASH\) partnership with USAID**](#) is another example of our impact. Rotary club volunteers combine

business and project management skills with USAID's technical expertise to improve water and sanitation in Ghana and Uganda. The direct beneficiaries of this partnership include the 160,000 people in Ghana who now have clean water and access to sanitation and hygiene. An additional benefit of our long-term involvement is that we can actively analyze more than 10 years of project data to learn what worked and what didn't, so future projects will have an even greater impact.

Although every partnership is important to Rotary, one of our most effective collaborations continues to be the Global Polio Eradication Initiative (GPEI). Polio once paralyzed hundreds of thousands of children every year, but thanks to the tireless efforts of Rotary and our GPEI partners, world governments, and thousands of health care workers, just two countries continue to report wild poliovirus transmission.

Nigeria reached three years without a case of wild polio, which means the entire African region soon could be certified wild poliovirus-free. We are implementing new strategies to address the remaining challenges in Afghanistan and Pakistan, which saw increases in cases of wild polio in 2019 caused by poor immunization campaign quality, insecurity, mobile populations, and, in some cases, vaccine refusals.

Together with our partners, we are learning from our successes and challenges so we can be strategic about finding new ways to move forward.

Real-time impact of our polio network

A global emergency requires that we adapt. In the midst of the COVID-19 pandemic, [the polio infrastructure Rotarians helped build is being used to address and help prevent the spread of the coronavirus](#).

The GPEI, with its thousands of polio workers and an extensive laboratory and surveillance network, now supplies the critical resources needed to support countries in their COVID-19 preparedness and response.

EXPAND OUR REACH

Rotary brings together individuals who use their talents, skills, backgrounds, and connections to solve problems and effect change. And we can achieve even more when people know us and unite with us.

Representing the communities we serve

When diversity is reflected in Rotary clubs, it can open doors and build bridges. We all have the responsibility to cultivate a diverse, equitable, and inclusive culture for all Rotary members and participants.

Change starts at the top, so last year, Rotary's Board of Directors set a goal to increase the number of women in Rotary to 30 percent by June 2023. To support this goal and remove barriers to leadership, Rotary hosted the webinar [We Are Rotary: Advancing Women as Leaders](#).

We also developed tools to help clubs and districts diversify, such as the [Diversifying Your Club assessment](#) and Rotary's Learning Center courses like [Building a Diverse Club](#) and [Committing to Diversity, Equity, and Inclusion](#). We are featuring Rotary's diverse voices [and experiences](#) across our various channels to educate and inspire others.

Sharing our stories

We have a compelling story to tell the world. As people of action, we live our vision and increase public awareness and understanding.

To help clubs communicate about Rotary in a clear, consistent way, we added new People of Action promotional materials and Rotary-branded virtual meeting backgrounds to the [Brand Center](#). As of 1 June 2020, there have been 1.4 million total visits to the Brand Center, and 1 million total asset downloads. During 2019-20, members downloaded over 30,000 templates to create their own People of Action ads, social media graphics, digital banners, and brochures to show the impact Rotary members are making in their communities.

Our robust news coverage and social media engagement showcased Rotarians in action throughout the world, generating interest in Rotary and support for our causes.

- Our media efforts secured more than 750 news stories featuring Rotary, including our leading role in ending polio, the new Rotary Peace Center at Makerere University in Uganda, and how Rotary's people of action are addressing challenges in their communities at home and abroad.
- The 2019 Rotary International Convention in Hamburg, Germany, generated 691 media stories, with 51 of those appearing in top-tier national outlets.
- Rotary's social media channels continue to invite engagement with our organization, providing updates in eight languages for more than 2.5 million fans and followers and generating 210,000 engagements per month.

World Polio Day, Rotary's annual event to raise global awareness for polio eradication, inspired record participation in 2019:

- More than 4,000 clubs and 479 districts held over 5,900 events in 136 countries.
- This year's World Polio Day Online Global Update recognized the heroes of polio eradication, highlighting the efforts of Rotarians in countries where polio is endemic or has had a recent impact. The program was broadcast across Rotary's social media channels, receiving more than 177,000 views in nine languages. Total World Polio Day social media content reached 13.49 million people.
- Rotary raised more than \$415,000 in online contributions to PolioPlus, exceeding our fundraising goal of \$250,000.
- We generated 4.8 million social media engagements, four times more than our goal of 1.1 million.
- Approximately 1,160 news stories mentioned Rotary and World Polio Day thanks to the efforts of Rotary and its members.

Through these efforts, more people are learning about Rotary and our global people of action.

Most recently, Rotary has leveraged all of its channels to communicate regularly to members, participants, and the public about how Rotary is responding to the pandemic. An increase in views, clicks, and responses shows our information is being well-received.

ENHANCE PARTICIPANT ENGAGEMENT

Many volunteer organizations offer membership, so it's important for Rotary to provide a distinctive, one-of-a-kind experience. We at the Secretariat continue to find ways to meet our members' needs and enhance the overall membership experience.

Keeping members engaged

COVID-19 changed the way Rotary clubs meet and operate. While many clubs moved their meetings online and found other ways to stay engaged, some may not have made the transition. This could lead to members feeling disconnected from Rotary during the global health pandemic.

Rotary staff, senior leaders, regional leaders, and district leaders are working together to reach out to clubs to offer support and share resources that help them re-engage with their members.

Member benefits

Rotary formed a new alliance with [Toastmasters International](#), a nonprofit, educational organization dedicated to helping its members become more effective speakers, communicators, and leaders. This alliance provides new professional development opportunities and new connections to Rotarians and Rotaractors through collaboration with local Toastmasters clubs. Toastmasters is also developing a series of [communication and leadership courses](#) for Rotarians and Rotaractors.

Rotary members receive discounts on a variety of products and services through [Rotary Global Rewards](#). For example, the program now offers a 20 percent discount on Zoom videoconferencing services, which members are taking advantage of to host virtual meetings and connect with one another.

Membership leads are waiting for us

Potential member inquiries through the online Membership Leads program are at an all-time high, but the conversion rate is very low — only 3 percent of these leads become members. If we want to continue to grow Rotary membership, we must follow up on every lead and every opportunity to welcome more people into Rotary.

The Secretariat is working with district leaders to improve the conversion rate and better engage with potential members and participants.

A new era for Rotaract

The 2019 Council on Legislation elevated Rotaract as a type of Rotary membership. The Board also approved removing the upper age limit, allowing clubs the flexibility to retain members over the age of 30. A Rotaract club can now also establish itself with or without a sponsor, sponsor another Rotaract club, and co-sponsor an Interact club.

These changes create greater flexibility for Rotaract clubs to design an experience that meets their needs and interests. Rotaractors can stay in the Rotary family longer, providing greater opportunity to join a Rotary club when they're ready.

INCREASE OUR ABILITY TO ADAPT

As a network of business and community leaders, Rotary members understand the importance of innovation and flexibility to move forward in changing times. Recently, we've shown our capacity to adapt and serve as the COVID-19 pandemic forced the cancellation of many in-person Rotary and Rotaract club meetings and events, including the 2020 International Convention. Our members, however, found new ways to stay engaged, connect with one another, and serve their communities, even while remaining physically apart.

Connecting virtually

Many club meetings now take place online, and some clubs are even inviting local and international speakers, such as health experts and financial consultants, to join remotely. Some of these guests include members of [Rotary](#)

[Action Groups](#), who are sharing their expertise with fellow Rotarians and Rotaractors. Clubs and districts are learning about the best practices for carrying out their service projects while adjusting to physical distancing policies.

[Rotary Fellowships](#) play a pivotal role in uniting the Rotary family through shared hobbies, interests, and professions. Fellowships are also connecting online to offer a reprieve during trying times — presenting digital concerts, exchanging at-home exercise and training tips, and learning new skills like photography.

Because of the growing interest in online meetings, the Rotary Learning Center created a new topic, Meeting Online, where members can share their own resources and best practices with one another. The Learning Center also offers more than 600 courses in 20 languages.

Rotary staff adapt and serve – from home

Practically overnight, Rotary staff all over the world transitioned from working in an office environment to working in their homes, and they did so seamlessly. This was no small feat, but our staff, like our members, are prepared to adapt and overcome challenges. Rotary staff is dedicated to serving and supporting our members.

A new kind of convention

In March, we sadly announced the cancelation of the 2020 International Convention due to COVID-19. Quickly though, we shifted our focus to hosting a virtual convention instead. In less than three months, Rotary staff produced a free, online convention — the first of its kind for Rotary.

[Now More than Ever, Rotary Connects the World: The 2020 Rotary Virtual Convention](#) takes places 20-26 June 2020 and features breakout sessions, keynote speakers, and even a virtual House of Friendship.

Piloting new experiences

Many community members who share our ideals — including younger professionals — are looking for opportunities to collaborate and serve, but not all are ready or able to join a club. How can we expand our reach and introduce

new participants to Rotary? By developing ways people can engage with Rotary outside of the traditional club model.

Rotary is piloting a new online community in Chicago, Illinois, and in Houston, Texas, USA, called Connect, where participants can meet to discuss professional development and service-related topics. There will be virtual and in-person networking events, when conditions permit, and participants will have the chance to be matched with a mentor or mentee. Through Connect, participants can access and share career and community service resources and find ways to get involved in local volunteer opportunities, including Rotary and Rotaract club activities.

Connect is an innovative way to present Rotary's values and vision to new participants, and one of our very first efforts to introduce new paths into our organization. Although testing begins in Chicago and Houston, we're looking at how we can expand to other areas.

To take advantage of the new ways that people are contributing, Rotary is also piloting a new online tool that allows members, participants, and donors to raise funds for The Rotary Foundation in celebration of their life events and activities, like birthdays, weddings, and sporting pursuits. These online social network fundraisers are another way to promote Rotary causes more widely. We hope to begin offering this feature to a limited audience during the 2020-21 Rotary year.

New programs like these demonstrate how Rotary continues to connect communities and adapt to current events. A challenging year may lie ahead, but no one is more equipped to find solutions that make a difference than Rotary's people

Module A-2: Striving To Be A Vibrant Rotary Club

Breakout Room Questions

1. Where do you stand in setting your club's goals for the coming year?
2. Refer to pp. 1-2 in LYC.
What steps help create meaningful goals and effective action plans for your Rotary club?
3. Refer to p. 3 in LYC.
What are the benefits of a three-year strategic plan?
Then point out the Strategic Planning Guide in the PETS Workbook.
4. Refer to the goals shown on the Rotary Citation handout in the PETS Workbook.
How does using the framework: Current State / Future State / Strategies / Action Steps help your club achieve its goals?
5. Refer to pages 29-32 in the LYC.
What are the benefits of sound financial and risk management procedures?
Identify three ways that you will ensure good stewardship of club funds; share your reasons with the group.
6. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
7. What is your **primary takeaway** from the Vibrant Rotary Club session?
8. Any other question(s)?

Notes

[illegible]

Lone Star P.E.T.S. 2021

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

MONDAY, FEBRUARY 22, 2021

MODULE A-3 GROWING AND ENGAGING YOUR CLUB MEMBERSHIP

GOAL

Club Presidents and Presidents-Elect will possess tools needed to champion effective membership development plans for their respective clubs.

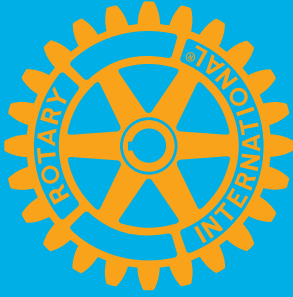
OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Share strategies and best practices to attract and engage members to improve retention
2. Describe how a Club President can create a club atmosphere that is welcoming to all groups
3. List key elements of club membership health

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 5: Strengthening Your Membership
Membership Assessment Tools
Strengthening Your Membership: Creating Your Membership Plan



IMPACT BEGINS
WITH YOU



Rotary

CONNECT WITH A **ROTARY CLUB TODAY**

Rotary members join clubs by invitation. Let us help you connect with a club that may be right for you. With 35,000 clubs around the world, and others that meet online, Rotary makes it easy to get involved and start making a difference today.

Be a part of the Rotary difference. Bring your passion, your perspective, and your purpose to Rotary.

To connect with a club in your area and learn more, visit us at www.rotary.org/join.



CONNECT WITH US:



One Rotary Center
1560 Sherman Avenue
Evanston, IL 60201-3698 USA
www.rotary.org

001-NA-(316)

THE **ROTARY** DIFFERENCE

Rotary is more than a service organization that's making a difference in your community. We're an international membership organization made up of people who share a passion for and commitment to enhancing communities and improving lives across the world. The difference we make starts with our members.

IMPACT ACROSS THE WORLD



With more than **1.2 million members** in clubs in almost every country, **we are improving communities around the globe**. As a member of Rotary, you'll have opportunities to change lives locally and to connect with other clubs to work on **international projects that address today's most pressing humanitarian challenges**, including fighting disease, providing clean water, supporting education, and promoting peace.

Our largest and proudest effort to date is our work to eradicate polio. We initiated the audacious polio eradication campaign in 1979, by vaccinating children in the Philippines. **With the help of our partners, we have since reduced polio cases worldwide by 99.9 percent.**

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WE SEE DIFFERENTLY:

We are problem solvers working together to achieve a better world. Our members are deeply ingrained in the communities in which they live and serve, affording them insight into local challenges and access to the leaders, resources, and networking opportunities needed to strategize and take action to make lasting change.



WE THINK DIFFERENTLY:

Rotary clubs reflect the diversity of our communities and the breadth of viewpoints that comes from our members' varied professional and personal experiences. For more than 100 years, we have been applying different perspectives to create innovative, sustainable solutions that address the needs and challenges affecting our communities.

HOW ARE WE DIFFERENT?



WE LEAD DIFFERENTLY:

As Rotary members we hold ourselves to the highest ethical standards. Community members, community leaders, and other organizations seek us out because they know they can trust us to be effective partners and deliver on our promises.



OUR ACTIONS MAKE A DIFFERENCE:

Harnessing our unique perspectives and ideas gives us a shared purpose — one that compels us to take action. We roll up our sleeves, leverage our personal relationships with local partners and businesses, and apply our leadership skills as a way to get the job done and bring to life the changes we envision.



IMPACT BEGINS WITH OUR LOCAL CLUBS

The impact our members make takes shape at Rotary club meetings and activities. These gatherings allow you to join other passionate, visionary women and men regularly to discuss and act upon community needs. Rotary club meetings are also a place to strengthen connections to friends and neighbors and form meaningful relationships that last a lifetime.

And just as Rotary helps you invest in your community, it gives you an opportunity to invest in yourself. Many clubs offer continuous learning opportunities, with a broad range of workshops, conferences, guest speakers, and more — all aimed at helping you grow personally and professionally.

MEMBERSHIP RESOURCE GUIDE

The hyperlinked resources below (underlined in a blue font) can be downloaded on www.rotary.org by clicking on the hyperlink. If you experience any trouble when downloading resources, please email membershipdevelopment@rotary.org.

PUBLICATIONS		
Name	Description	Audience
Strengthening Your Membership	This guide explains the process of creating a membership development plan and provides strategies and tools you can use to attract and engage new members.	Club presidents and membership committees, and district membership chairs
Starting a Rotary Club	This guide describes a nine-step process to create a new club, from the initial idea to the charter celebration, and beyond.	District governors
Introducing New Members to Rotary	Utilize this guide to develop a process for engaging new members from the start by helping them get involved, connecting them with a mentor, and by pacing the learning over time.	Club leadership
Be A Vibrant Club	A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.	Club leadership
Connect for Good	Eight-page guide shows how to get involved and connect with Rotary.	Current members
Rotary Basics	This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.	New members

LEARNING CENTER: ONLINE COURSES		
Name	Description	Audience
Leading Change	Learn the basics of change management, including how to succeed in leading change, how to assess people's readiness to make changes, how to plan for change, and how to respond to any resistance.	Rotary members
Essentials of Understanding Conflict	Learn the essentials of how to understand, manage, and resolve conflict.	Rotary members
Preventing and Addressing Harassment	Take this course to learn how you can create a harassment-free environment in your club.	Rotary members
Rotary Basics	Meet members around the world, watch videos, deepen your understanding of Rotary, and test your Rotary knowledge in this course. While designed for new members, it's a good refresher for long-time members.	Rotary members
Starting a New Rotary Club 101	This 15-minute video outlines the 9 step process of establishing a new club, from the initial idea to the charter celebration and beyond.	Rotary members
Club Membership Committee Basics	Learn more about your responsibilities in developing your club's strategic membership plan to attract and engage members.	Club membership committee members
Your Membership Plan	Create a step-by-step plan to strengthen your membership and keep your club vibrant and relevant.	Rotary members
Best Practices for Engaging Members	Is your club losing more members than it's gaining? It's time to get serious about engaging members.	Rotary members

Kick-start Your New Member Orientation	Are new members leaving within a year or two? Learn how to better connect with them and help them get involved from the start.	Rotary members
Practicing Flexibility and Innovation	If you find that your club's rules are preventing members from getting the experience they want from Rotary, try changing them.	Rotary members
Building a Diverse Club	A diverse club reflects the make-up of its community, has a greater impact, and is more attractive to prospective members.	Rotary members
Online Membership Leads	What's all this talk about membership leads? This course will clear up the mystery behind these online leads.	Rotary members
Is Your Club Healthy?	Take this course to help your club stay valuable to your members and your community.	Rotary members
Strategies for Attracting New Members	Are guests of your club not interested in joining? Learn how to improve the club experience to make it attractive to visitors.	Rotary members
How to Use the Program Participants and Alumni Report Guide	Learn how to use the Program Participants and Alumni Report as a tool to identify club program speakers, service project volunteers, or prospective members.	District and zone leadership
Develop a Speech	Learn how to organize a speech that leaves a lasting impression on your audience.	Rotary members
Deliver a Speech	Explore and practice the effect your voice and body language can have when giving a speech.	Rotary members
Inspirational Speech	Learn how to engage, persuade, and inspire your audience. This course focuses on providing you with the knowledge needed to succeed in persuasive speaking and motivational speaking.	Rotary members
Interpersonal Communication and Networking	Learn techniques for building and maintaining professional relationships and networks. Topics introduced in this session include creating beneficial relationships, maintaining and building a network, and recognizing the point of view of others.	Rotary members

TOOLS		
Name	Description	Audience
Club Planning Assistant	Answer questions about your club and get links to specific resources to address your club's challenges.	Rotary members
Membership Best Practices Discussion Group	This discussion group provides a forum for leaders at all levels to share best practices for recruiting, attracting, engaging, and retaining current and prospective members.	Rotary members
Rotary Club Health Check	This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.	Club leaders
Membership Assessment Tools	Learn how to evaluate and improve your membership development plan with these tools, complete with sample surveys and information on organizing new clubs, recruiting and retaining members.	Current members
Customizable Rotary Club Brochure	In this template, clubs can upload their own photos, edit text, list dates of upcoming events, and share member testimonials.	Prospective members
How to Delegate Your Online Access	As a club or district officer, you can temporarily delegate your level of access in My Rotary to another member for assistance in managing Rotary business online.	Club and district leaders

RESOURCES		
Name	Description	Audience
Starting a Club webpage	Find information and resources about the process of starting a Rotary club	Rotary members
Meeting Online	Visit this learning topic to explore and share resources, best practices, and ideas for moving meetings online.	Rotary members

Guide to Corporate Membership	This guide describes the benefits of corporate membership and how to use it in your club.	Rotary members
Guide to Satellite Clubs	This guide describes the benefits of a satellite club and how to start one.	Rotary members
Guide to Passport Clubs	This guide explains how passport clubs work, the benefits it offers, and how clubs can get started. It also includes different models structures, a template that can be used when connecting with local businesses and organizations about this opportunity, and sample bylaws.	Rotary members
Rotary Club Models	Find examples of various club types linked, model descriptions, and their target demographics	Rotary members
Club Membership Committee Checklist	Keep your membership committee on track with this checklist covering assessments, attraction, and engagement initiatives.	Rotary members
Engaging Young Professionals Toolkit	This online toolkit can help clubs connect with Young Professionals by first understanding them. Topics included are characteristics of your audience, your club's culture, ideas for outreach and engagement , and the long-term benefits of becoming a Rotarian.	Rotary members
Updated! State of Rotary's Membership power point	Understand the current State of Rotary's Membership: how we got here, who is joining, who is leaving — and the opportunities that exist to strengthen membership.	Rotary members
Club Flexibility web page	This web page offers ways clubs can implement flexible membership options. Includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.	Rotary members
“Discover Rotary” Power Point	Show this presentation at prospective member or other events to introduce Rotary to the public. It covers Rotary's values, history, and the benefits of membership.	Prospective members
Understanding Membership Reports: Getting Started	This guide lists each membership report available, explains the information it provides, and steps on how to find them.	Rotary members
Creating a Positive Experience for Prospective Members	Find tips and ideas for connecting with prospective members, and what you can do to ensure they have a positive experience.	Rotary members
Proposing New Members	Best practices for proposing new members to your club.	Rotary members
How to Manage Membership Leads (Clubs)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the club level.	Club leaders
How to Manage Membership Leads (Districts)	Step-by-step directions for using the Membership Leads database to track and manage member leads at the district level.	District leaders
Membership Minute e-newsletter	Bi-monthly Rotary stories and the latest membership development ideas, strategies, and resources.	Club and district leaders
Strategic Planning Guide	Use this guide and worksheet to help develop a vision, goals, and measurements for your strategic plan.	Club and district leaders

WEBINARS		
Name	Description	Audience
Courageous Leadership	Using stories of transformation from Rotary and in their professional careers, hear trainers Louisa Horne and Doug Logan outline strategies for clubs on creating a vibrant membership experience.	Rotary members
Membership Models for the Future of Rotary	Associate and corporate memberships, passport, satellite, and hybrid clubs: these are just some of the innovative, flexible models that clubs have designed recently. Panelists on this webinar discuss the challenges, benefits, and lessons of designing a club experience that works for every member	Rotary members

Building New Clubs Together	This webinar will be helpful if you believe that adding a new Rotary club in your community will broaden your capacity for service, think a satellite club may allow more prospective members to engage with Rotary, or want tips on how to charter a Rotaract club, or encourage Rotaractors to start their own clubs.	Rotary members
First Impressions Matter webinar: The Membership Experience	Find out what happens when Rotarians use every interaction to engage, educate, and inspire fellow Rotarians and the community. Moderated by Jennifer Jones, Past Rotary Vice President.	Rotary members
How to Manage Membership Leads for District Leaders	This webinar shows district leaders how to effectively utilize the Membership Leads platform, provides best practices for encouraging clubs to take action with leads, and includes a Q&A section with attendees.	District leaders
Revitalize + Rethink Your Rotary Club: Crafting Your Member Experience	Learn ways your club can create an engaging and rewarding member experience by embracing new rules and flexibility options your members.	Rotary members
We Are Rotary: Advancing Women as Leaders	Less than 25 percent of Rotary's members around the world are women, and women are underrepresented in leadership positions at every level. Watch this presentation to learn the benefits of being a diverse, equitable, and inclusive organization and the barriers that women face when they consider leadership positions.	Rotary members
State of Membership Webinar	Watch to see updates on how we got here, who's joining, who's leaving , and opportunities for us to all make membership a top priority.	Rotary members
Connect with the (Online) Rotary World	The world has changed in response to the COVID-19 pandemic making the need for Rotary more relevant than ever. Hear from a panel of Rotarians who have led their clubs and districts in the move to virtual connection including meetings, social media, fun ways to engage, and local and global service opportunities.	Rotary members
DEI in Rotary: How are we Doing?	The COVID-19 pandemic and anti-racism solidarity demonstrations are calling out global inequities and the need for social justice. It is even more important that Rotary be an organization inclusive of all cultures, experiences, and identities. Hear from Rotarians at the forefront of change, learn about Rotary's diversity, equity, and inclusion (DEI) progress , and be equipped with tools to create a more diverse, inclusive, and equitable organization.	Rotary members
New! Connecting with Prospective Members in Your Community	Watch this recording to view a demo of how to effectively use Rotary's membership leads platform to connect with prospective members, and a Q&A with Rotary staff from the Membership Development team.	Club Leaders

TRAINING MANUALS & DOCUMENTS		
Name	Description	Audience
District Membership Seminar Leader's Guide	This guide provides you with speaking points, PowerPoint templates, and exercises to ensure your attendees participate and are engaged in each breakout session for club leaders or members.	District leaders
District Membership Committee Terms & Responsibilities	This sheet explains the district membership committee's purpose , chair appointment, qualifications, duties, and responsibilities.	District leaders
Lead Your District: Committee Chair	Use this manual to set up and run an effective district committee	District leaders

Rotary International Harassment Policy

What is harassment?

Rotary has a harassment policy to ensure that we provide a safe, fun, and inclusive environment for all. It defines harassment as any conduct — verbal or physical — that denigrates, insults, or offends a person or group based on characteristics that include age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.

Harassment can take many forms. When a behavior becomes pervasive or extreme, it is harassment. Here are some examples:

- Using insulting words, whether spoken or written, including in email or on social media
- Bullying, including verbal or physical threats or intimidation
- Making derogatory remarks on social media or in email
- Engaging in gossip, including insulting statements about people's private lives that could damage their reputations
- Deliberately impeding a person's movements
- Asking questions or making comments about a person's sexual activity or experiences
- Making jokes or using derogatory language about someone's age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity
- Making or threatening unwelcome physical contact, such as brushing against, embracing, or pinching
- Making unsolicited comments about a person's attractiveness or appearance
- Leering or whistling
- Using, displaying, or sharing sexually suggestive or offensive words, objects, pictures, articles, letters, emails, texts, or websites
- Making references to age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity

It's important for all club and district leaders to take all allegations of harassment seriously and address the situation.

Creating a harassment-free environment

Making sure that your club meetings and social events are free from harassment is something everyone should be a part of. The introduction to this course and the section that defines harassment discussed Rotary's commitment to preventing harassing behavior. District leaders, including governors, assistant governors, and committee chairs, must work with their clubs to maintain an environment that promotes safety, courtesy, dignity, and respect for all.

Here are some steps you can take to create a harassment-free atmosphere:

- Club leaders should discuss Rotary's policy on creating an environment free of harassment (included in its entirety at the end of this course) at a club board meeting, and determine how you want to talk about it with members.

- Talk about the policy at your club assembly. Before starting the discussion, set a list of rules that everyone agrees on to guide what could be an uncomfortable discussion. Some possible rules: talk about your own experiences and feelings, ask questions in a way to help you understand, and have only one person speak at a time.
- Club leaders should acknowledge any instances in the past that would have qualified as harassment and make it clear that such behavior will not be accepted.
- Club and district leaders should emphasize the message that Rotary will not tolerate harassment.
- Members should feel empowered to stand up to harassment when it's occurring and report it to law enforcement officials or to club or district leaders if necessary.
- Club leaders should tell members how club or district leaders will respond to reports of harassment.
- Reiterate that it is everyone's responsibility to create a harassment-free environment.

Rotary's founding ideal of bringing together leaders of different backgrounds in order to improve their communities can be accomplished only in a safe, harassment-free environment.

What to do if you're harassed

- If your safety is in doubt, contact local law enforcement
- Tell someone on the club's board, a district leader, or a zone leader
- Report the incident to Rotary International
 - At a Rotary International-sponsored event like the International Assembly or the Rotary International Convention should be reported to Rotary's general secretary.
 - Any allegations of harassment by district governors, governors-elect, governors-nominee, directors, or trustees must also be reported to the general secretary. Contact your **Club and District Support** representative.
 - Other incidents should be reported to your club, district, or zone leaders. If they do not respond, notify your Club and District Support representative. They can contact the district and zone leaders for further investigation and encourage them to help resolve the issue.

As a reminder, any allegation of harassment involving our youth must be reported to Rotary International at youthprotection@rotary.org within 72 hours.

How to handle reports of harassment

Allegations of harassment should be taken seriously every time.

- Acknowledge every report with respect
- Report the allegation to the appropriate person or committee
- Review the complaint and determine who to interview
- Conduct a thorough investigation
- Write a summary of the incident including any action you recommend
- Remove the accused person from youth activities
- Terminate a person's club membership

Additional Resources:

The Rotary Learning Center- Preventing and Addressing Harassment

<https://learn.rotary.org/members/learn/course/575/PreventingandAddressingHarassment>

Rotary Code of Policies- Article 26.120. Harassment-free Environment



ROTARY 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.

By using this health check, you're taking a step to maintain your club's health and preserve its value for members and the community.

Place a check mark in the boxes next to the statements you consider to be true. Then act on the suggested remedies for any problem areas you've identified.

YOUR CLUB EXPERIENCE



Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary 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.
- ☐ Our club meeting programs are relevant, interesting, and varied.
- ☐ We have a greeter who welcomes members to meetings.
- ☐ Our meetings are organized and run professionally.
- ☐ Members sit at different tables each week to meet and talk to different people.
- ☐ Some of the members of my club are my close friends.
- ☐ Members other than club leaders participate in Rotary events at the district or international level.
- ☐ Most members are aware of Rotary's progress toward polio eradication and feel proud to be a part of it.
- ☐ Our members contribute to The Rotary Foundation.
- ☐ We raise funds in a way that allows members to contribute what they wish.
- ☐ We recognize members of the club or community at least monthly.
- ☐ I have made international connections through Rotary.
- ☐ Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.

**SEE THE FOLLOWING PAGE
FOR YOUR PROGNOSIS**





While some members leave for logistical reasons, many leave because of a lack of engagement, an inflexible club culture or other unmet expectations, all of which affect a member's experience. If members are not having a good experience, your club is at risk of losing them. Look at the boxes left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> + Change the meeting format or style. For ideas, see Lead Your Club: President, chapter 2, and Be a Vibrant Club's "Ideas to try." + Find out what your members want using the Member Satisfaction Survey and then give them that experience. + Develop leadership skills among club leaders and members by holding a leadership skills training.
Rotary experience beyond the club	<ul style="list-style-type: none"> + Sponsor an Interact or Rotaract club, organize a RYLA event, create a scholarship, or start an exchange. + Join a Rotary Fellowship or Rotarian Action Group. + Promote district events that are open to all members. Try having someone who's attended in the past talk about the experience. + Promote the work that Rotary does globally, including polio eradication, by showing a short Rotary video or projects on Rotary Showcase during a club meeting.

SERVICE AND SOCIALS



Participating in service and having fun with fellow members are the primary reasons Rotarians join and stay in Rotary. The healthiest clubs vary their activities and offer multiple 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 (aside from club meetings) for socializing and networking.
- ☐ Our club encourages members to bring partners, spouses, and family members to club meetings and events.
- ☐ Our club offers members leadership opportunities and professional development.
- ☐ Our club invites Rotaractors, Interactors, and Youth Exchange students to participate in meetings and is active in Interact and Rotaract clubs and mentors their members.
- ☐ Our club sponsors a Rotaract or Interact club, sponsors or hosts a Youth Exchange student, or sponsors a RYLA participant.
- ☐ We consult community leaders and community members to determine needs before choosing a project.
- ☐ We visit Rotary Ideas, an online project idea starter, before choosing a new project.
- ☐ Our club has a service project in progress.
- ☐ All members can give input on service and social activities.
- ☐ Our club service projects are aligned with Rotary's areas of focus and Avenues of Service.
- ☐ Our club has applied for or used Rotary grant funds for a service project.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> + Sponsor an Interact or Rotaract club, organize a RYLA event, create a scholarship, start an exchange, join a Rotarian Action Group, or support the Rotary Peace Centers.
Quality of projects	<ul style="list-style-type: none"> + Use Community Assessment Tools, Guide to Global Grants, and Rotary Ideas to improve the quality of your projects.
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.
Leadership	<ul style="list-style-type: none"> + Hold a leadership training.

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.

- ☐ Our club has had a net increase in members in the past year.
- ☐ Our club has had a net increase in female members in the past year.
- ☐ Our club has had a net increase in members under age 40.
- ☐ Our club seeks to recruit members from professions in the community that are underrepresented in the club.
- ☐ Our club keeps in touch with Rotary alumni (former Rotaractors, Youth Exchange students, peace fellows, and participants of other Rotary programs).
- ☐ Our club actively recruits Rotary alumni.
- ☐ Our club actively recruits recently retired professionals.
- ☐ Our club retains at least 90 percent of its members each year.
- ☐ At least 75 percent of our club members are involved in a hands-on service project, a leadership role, or other assigned roles.
- ☐ Our club has a process for soliciting feedback from members.
- ☐ A designated person checks and follows up on membership leads assigned to the club.
- ☐ Guests are asked to introduce themselves and are invited back.
- ☐ Member benefits are explained and promoted to new and continuing members.
- ☐ New members are provided with an orientation and opportunities to get involved.
- ☐ Newer and seasoned members are paired for mentoring relationships.
- ☐ We ask members to speak at meetings about their vocations or other topics of interest.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> + Take action to diversify your club using Diversifying Your Club: A Member Diversity Assessment.
Professional diversity	<ul style="list-style-type: none"> + Make your club a microcosm of your community with Representing Your Community's Professions: A Classification Assessment.
Stagnant or declining membership	<ul style="list-style-type: none"> + Create a membership development plan with Strengthening Your Membership. + Connect to Membership Leads assigned to your club using How to Manage Membership Leads (For Clubs) and resources for prospective members. + Target prospective members using this exercise. + Show members how to propose new members to their own club and explain that they can refer qualified prospects to other clubs.
Members leaving	<ul style="list-style-type: none"> + Start with the Member Satisfaction Survey to enhance current members' experience. + Learn and act on trends using the Retention Assessment and Analysis. + Use the Exit Survey to understand why members resign. + Let resigning members know they can rejoin or change clubs when they are ready.
Orientation and Rotary knowledge	<ul style="list-style-type: none"> + Offer new member orientation, leadership development, and ongoing learning opportunities with Rotary's Learning Center.

IMAGE



Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

- ☐ We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.
- ☐ Our club has members dedicated to public image and outreach.
- ☐ Our club appeared in the local media multiple times last year.
- ☐ We promote our club and Rotary through various media in the community.
- ☐ Our club invites members of the media to cover our service work.
- ☐ Our club materials follow Rotary's updated branding guidelines.
- ☐ We use branded materials and templates from Rotary's Brand Center.
- ☐ We use marketing materials provided by Rotary International, such as public service announcements, videos, images, and logos.
- ☐ We display Rotary signs and banners at our meeting place.
- ☐ Our club's presence is known in our community.
- ☐ We have a customized brochure that we give to community members and prospects.
- ☐ We use Rotary Showcase to promote our finished projects.



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 left unchecked and consider implementing those suggestions as well as these:

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> + Use the resources in Rotary's Media 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 customizable club brochures and membership materials on Rotary's Brand Center. + Follow the Voice and Visual Identity Guidelines in any materials your club creates. + Use Rotary Images and Rotary videos, as well as images of your members, in your materials.
Online presence	<ul style="list-style-type: none"> + Find a tech-savvy member to create and manage your club website and social media pages. + Take the social media course in the Learning Center. + Use Rotary Images and Rotary videos, as well as images and videos of your own members. + Share your projects on Rotary Showcase.
Marketing expertise	<ul style="list-style-type: none"> + Find tips in Lead Your Club: Public Relations Committee 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. + Build your own social media expertise using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

- ☐ We have a strategic plan for our club that we update regularly.
- ☐ We have annual goals and enter them in Rotary Club Central.
- ☐ Our club has committees that support the activities and regularly report to the club board on progress toward goals.
- ☐ Our club board changes what isn't working well and updates club bylaws accordingly.
- ☐ We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.
- ☐ Our club president attends PETS, and club leaders attend the district training assembly.
- ☐ Members attend district events and seminars on Rotary topics that interest them.
- ☐ New members are officially inducted and are presented with appropriate materials.
- ☐ At least half of our club's members have a My Rotary account.
- ☐ Club officers conduct Rotary business using My Rotary or integrated club software.
- ☐ 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.
- ☐ We offer ongoing learning opportunities for our members.



Clubs that don't have skilled members in leadership roles or that neglect member needs are at risk of 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 left unchecked and consider implementing 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. + Track your annual goals in Rotary Club Central. + Use Strengthening Your Membership to make a membership development plan.
Innovation	<ul style="list-style-type: none"> + Ask members for input using the Member Satisfaction Survey, and try their ideas. If they're successful, edit your club bylaws accordingly. + Use templates in the Brand Center to create your own materials.
Processes	<ul style="list-style-type: none"> + Develop standard processes for new members, prospective member follow-up, proposing a new member, leadership continuity, etc.
Leadership	<ul style="list-style-type: none"> + Find tips and resources in Lead Your Club: President, Secretary, and Treasurer. + Offer leadership development opportunities and promote self-paced learning with Rotary's Learning Center.
Managing funds	<ul style="list-style-type: none"> + Use The Rotary Foundation Reference Guide to learn about giving options. + Find best practices in Lead Your Club: Treasurer.
Managing your club on MyRotary	<ul style="list-style-type: none"> + Use the Club Administration section of My Rotary to find reports; add, edit, or remove a member; pay your club invoice; and track your membership leads.

WHAT'S NEXT?



Using the Rotary Club Health Check is the first step in becoming a healthier, more vibrant club. Take note of which areas had the most check 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, Rotary clubs must adapt to continue to be useful. Your efforts to make changes will recharge your members and keep your club fit and relevant.



FEATURED RESOURCES

Membership Assessment Tools

Membership resources

Brand Center

Learning Center

Rotary videos



YOUR MEMBERSHIP PLAN WORKSHEET

Use this worksheet to make a membership plan for your club. After evaluating your club, focus on the particular steps that address your club's toughest challenges. The steps will direct you to resources that can help. When you've completed the steps, you will have identified challenges and opportunities, developed a vision, and generated strategies for prospective, new, and established members.

During club meetings, talk to members about the steps you're taking to strengthen membership, and encourage those members to get involved in the process.



Step 1: Evaluating Your Club

- ☐ We identified areas for improvement after using the [Rotary Club Health Check](#), and we took the course [Is Your Club Healthy?](#) in the [Learning Center](#) to review the modules that address the areas of our club that need attention. Based on what we learned, we will try the following:

Area for improvement

Remedy we plan to try

- ☐ We found ideas or best practices in [Be a Vibrant Club](#) that we will use to make our club innovative and flexible:

- ☐ We completed the membership [diversity assessment](#), have taken the course [Building a Diverse Club](#) in the [Learning Center](#), and plan to do the following to increase and celebrate new ideas and perspectives:



- ☐ Our club completed the [classification assessment](#) and plans to do the following to better represent our community's professional diversity:

Step 2: Creating a Vision for Your Club

- ☐ Our club completed the club visioning process and developed the following vision:

In 3-5 years, our club will:

- ☐ Our club has a membership committee with a leader and at least five members to guide the implementation of our vision and membership plan.

- ☐ Long-term goals that will help us achieve our vision include:

- ☐ We reviewed our club's strategic plan to ensure that our membership plan aligns with it.

Step 3: Attracting New Members

- ☐ Our club completed the course **Strategies for Attracting New Members** in the [Learning Center](#) and plans to make itself more attractive to prospective members in the following ways:

- ☐ Our club completed the [Finding New Club Members exercise](#) and will take these actions to find prospective members:



- ☐ Our club selected the following membership benefits to highlight when speaking to prospective members:

- ☐ Our club took the course **Practicing Flexibility and Innovation** in the [Learning Center](#) to understand the flexible options now available to clubs, and we plan to try the following to better accommodate members:

- ☐ Our club took the **Online Membership Leads** course in the [Learning Center](#), and we understand how membership leads can benefit our club.

☐ Our club leaders have determined who will manage membership leads assigned to our club.

☐ Our club has a process for following up with prospective members assigned to us through the membership leads program.

- ☐ Our club has read [Creating a Positive Experience for Prospective Members](#), understands how that experience can influence prospective members' perceptions of Rotary, and has a plan to ensure we create a good experience for prospects whether or not they join.

Step 4: Engaging Your Club's Members

- ☐ Our club has asked members to complete the [member satisfaction survey](#) and decided to implement the following changes based on the results:



- ☐ Our membership committee members have taken the course **Kick-start Your New Member Orientation** in the [Learning Center](#), have read [Introducing New Members to Rotary](#), and are developing an orientation process that educates new members and involves them in the club. Our orientation process will include the following:

- ☐ Our club completed the [retention assessment and analysis](#), discussed the results, and will take these steps to improve our engagement and retention:

- ☐ Our club has taken the course **Best Practices for Engaging Members** in the [Learning Center](#) and will take these actions to engage our members:

- ☐ Our club has looked at the many ways members can get involved through Rotary, as outlined in [Connect for Good](#), and will encourage members to get involved in these new ways:

- ☐ Our club asked members who've left recently to complete the [exit survey](#) to better understand why members leave the club. We've discussed the results and will take these steps to engage the member groups we've identified as the most vulnerable to termination:

Member groups

Strategy



Step 5: Improving Your Public Image

- ☐ We have selected a club member to manage our social media content.
- ☐ We have selected a member to manage and update our club website using materials from Rotary's [Brand Center](#).
- ☐ We have selected a member to update our customizable club brochure using the template on Rotary's [Brand Center](#).
- ☐ We visited the [Brand Center](#) on My Rotary and will use these additional tools to promote awareness in our community:

- ☐ Our club hosted a focus group in our community. The group yielded these findings:

Step 6: Supporting New Clubs

- ☐ Our club membership committee chair has told our district governor that we're willing to serve as a sponsor club.
- ☐ Our club members have discussed the responsibilities of serving as a sponsor club and agree to commit to this relationship.
- ☐ Our club leaders are open to supporting a satellite club and consider it as an option for accommodating differing needs among members.

Step 7: Supporting Your Club: Rotary Resources and Tools

- ☐ Our club membership committee communicates regularly with our district membership committee.
- ☐ Our club leaders regularly communicate with our district governor or assistant governor and ask for help when we need it.
- ☐ Our club membership committee members have visited rotary.org/membership within the past month and know where to find Rotary materials to help our club.

FINDING NEW CLUB MEMBERS



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

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

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



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

OUTCOME

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

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

GETTING ORGANIZED

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



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



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

GETTING STARTED

Ready to start? Here's how.

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

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

Step 2: Make an action plan

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

Step 3: Invite prospective members to a club event

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

Step 4: Follow through

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

Interested in doing other assessments?

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

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

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

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

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



IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

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

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

Member name: _____ Date: _____

Professional Contacts

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Service Contacts

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Community Contacts

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Name: _____ Occupation: _____

Rotary Contacts

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

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

Name: _____ Occupation: _____

Name: _____ Occupation: _____

IMPROVING YOUR MEMBER RETENTION



Keeping current members is a sign of a club's stability and overall well-being. Many clubs don't recognize their retention problems if the number of members remains somewhat steady. However, clubs that consistently lose members and compensate by inducting new members are not managing their growth or retention well. This assessment provides a view of how both the induction and the termination of members contribute to the net gain or loss of members.

OUTCOME

Conduct this assessment and act on its results to:

- Determine when and why members leave your club
- Generate strategies to keep them engaged and involved so they stay

GETTING ORGANIZED

To complete the steps below, you will need access to club membership reports on My Rotary. The club president, secretary, treasurer, membership chair, and Foundation chair have this access and can delegate it to any fellow club member. It may be helpful to work with a member who has experience in data analysis.



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

GETTING STARTED

Ready to start? Here's how.

Step 1: Review your club's historical and existing member retention percentages

Go to Rotary Club Central's [Reports page](#) and, under **Club Reports**, choose the **Member Viability and Growth** report to see current retention rates for existing members.



To export reports, click or tap Export (the  icon), and choose a program or format. You can now save or print the report.

To run the Member Viability and Growth report without following a link to the Reports page:

- Sign in to My Rotary
- From the **Take Action** menu, choose **Rotary Club Central**
- Choose **Reports** from the options on the left
- Under **Club Reports**, choose **Member Viability and Growth**

Step 2: Determine when members leave your club

Run the Membership Termination Profile report to see when people are most likely to terminate their club membership and the reasons they give for doing so. Knowing at what point in their Rotary tenure members are most likely to leave can help you recognize the club's retention strengths and weaknesses and focus your efforts accordingly.

Go to Rotary Club Central's [Reports page](#) and, under **Club Reports**, choose **Membership Termination Profile**.

To run the Membership Termination Profile without following a link to the Reports page:

- Sign in to My Rotary
- From the **Take Action** menu, choose **Rotary Club Central**
- Choose **Reports** from the options on the left
- Under **Club Reports**, choose **Membership Termination Profile**

Step 3: Generate strategies for keeping members

Once you've reviewed the Member Viability and Growth and Membership Termination Profile reports, discuss the results within the membership committee. Consider these questions:

- Who is leaving your club? Veteran members? New members? Both?
- Why are members leaving?

Step 4: Develop an action plan

Report the membership committee's findings to the club. Facilitate a discussion about how you might address areas of weakness and build on what you're doing well.

ROTARY RESEARCH

Understanding why members leave is crucial to strengthening your club. The Exit Survey in Understanding Why Members Leave is designed to gather this information. Rotary International has conducted extensive research on the reasons members leave their clubs worldwide. Here's what we've found.

Members who stay less than 1 year

Many members leave within the first year because they were not fully informed about the responsibilities of membership before joining or not fully educated about Rotary after joining. Some have trouble meeting attendance requirements or struggle with financial obligation, while others say that their networking expectations were not being met.

What you can do

If your club loses members within the first year, focus on:

- Communicating better to prospective members, both about the personal and professional benefits that your club has to offer, as well as about the responsibilities of being a Rotary member
- Planning meaningful induction ceremonies that celebrate this special step and making sure current members make new members feel welcome
- Making club meetings fun, energetic, and humorous, without losing sight of Rotary's mission
- Assigning new members mentors who can explain club workings and traditions, answer questions, help them get to know other members, and, if they miss any meetings, make sure all is well
- Offering useful new member orientation programs
- Assigning newer members to committees or otherwise involving them in the club
- Connecting often with new members to answer questions and teach them about Rotary



Use the Member Satisfaction Survey in **Enhancing the Club Experience** to ask all members for feedback about your club and ideas for improving their experience.

Members who stay for 1-2 years

Many members who leave after spending one to two years in a club do so because they do not feel engaged in club events and activities, their fellowship expectations aren't being met, or they have difficulty meeting the attendance requirements because of competing priorities.

What you can do

Take action to keep members who have been in your club for one to two years:

- Identify members who have been in your club for one to two years and make sure they are involved in a project or committee that interests them.
- Ask these members for their feedback. They may have ideas for revitalizing the club's fellowship activities or service projects.
- Suggest hosting a Youth Exchange student, or see if they would like to serve as a liaison to your Rotaract or Interact club.
- Assign mentors to members who don't have them, or suggest that they change mentors if they would like to.

Members who stay for 3-5 years

Members who leave after spending three to five years in a club may do so because their fellowship expectations are not being met, they are frustrated with the club's leadership, or they have difficulty meeting the attendance requirements because of competing priorities.

What you can do

For members who have been in your club for three to five years:

- Provide leadership opportunities. Members can get more involved by serving as club officers. Encourage those who have already held club leadership positions to mentor newer members or participate in district activities. In taking on leadership roles, they will feel useful, valued, and connected with the club's decisions and events.
- Organize new activities, such as continuing member education, or revitalize established club activities so that members remain engaged and excited about attending club meetings and fellowship opportunities.
- Get members' feedback on their club experience and ask for their ideas on what could be improved.
- Put their expertise and skills to use and recognize them for their efforts.

Members who stay 6-10 years

Some members who leave after spending six to 10 years in a club report that their fellowship expectations weren't being met and that they were frustrated with the club's leadership. Others leave when they retire or need to relocate.

What you can do

For members who have been in your club for six to 10 years:

- Recommend they mentor newer members and get involved in more district activities, such as planning the district conference or serving on a district committee. Or they might wish to join a [Rotary Fellowship](#). Both can help them meet more people and experience Rotary beyond the club.
- If members are planning to leave upon retiring, remind them that retired members are an important part of Rotary. They provide valuable perspective and can serve as mentors to younger professionals in the club.
- If members are relocating, forward their contact information to the clubs in their new area, [refer them](#) through My Rotary, or encourage them to let Rotary know they want to [change clubs](#).
- Put their expertise and skills to use and recognize them for their efforts.

Members who leave after 10 years

Many members who leave after spending more than 10 years in a club say they are not interested in the club's meetings and activities. Other members choose to leave because of retirement, family obligations, financial constraints, or health problems.

What you can do

For members who have been in your club more than 10 years:

- Spend some time with them to learn whether any of the reasons above could prompt them to leave your club. Some reasons for leaving are beyond your control, but learning why members might leave can help you find ways to prevent it.
- Ask for their opinions on how to energize or reinvent your club meetings, or gauge their interest in taking on a district leadership position — assistant governor, district governor, or district committee chair.

- Consider easing the financial obligations of members of this group, who may be under financial strain because of retirement or other factors.
- Put their expertise and skills to use and recognize them for their efforts.
- See if they would be interested in mentoring a new member.

Interested in doing other assessments?

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

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

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

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

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

ENHANCING THE CLUB EXPERIENCE



The power of your club lies in your members. By asking them for feedback regularly, you are demonstrating your openness to change and empowering them to help craft an ideal club experience. Use this survey to obtain member feedback about your club. Then use the information to make a plan to ensure that members are enjoying their Rotary club experience.



Keep responses confidential when discussing and analyzing them.

OUTCOME

Conduct this assessment and act on its results to:

- Identify what your members like and don't like about their club experience
- Develop an action plan that builds on what your members like and discontinues or changes what your members aren't satisfied with

GETTING ORGANIZED

You'll need a dedicated group of members to conduct the member satisfaction survey. It can be your club's membership committee or a few interested, unbiased members. You can either devote time during a club meeting to talking about member satisfaction and taking the survey or hand it out or email it to members and allow them more time to complete it. Alternatively, hold a special meeting devoted to member satisfaction. Make it fun and use some of the time to have members take the survey.



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



Consider using an online survey tool. They're convenient, are often free or inexpensive to use, and are helpful in managing response data.

GETTING STARTED

Ready to start? Here's how.

Step 1: Introduce the survey

Discuss why it's important to get feedback from all club members.

Step 2: Distribute the survey

Pass out or email the Member Satisfaction Survey to members or use an online survey tool. Explain that their responses are confidential and will be used to enhance the club experience for both current and prospective members.

Step 3: Analyze the data

Have your dedicated group review the survey results. Stress the importance of confidentiality and respecting all viewpoints.

Step 4: Present the results

Present and discuss the survey results to the club. Allow time for members to ask questions.

Step 5: Make an action plan

Hold a forum where club members can offer ideas for addressing the survey findings. Develop a member engagement action plan and set a time frame for implementing changes.

Step 6: Take action

The final step is to implement the action plan. Talk to members and involve as many of them as you can in the process so that they are invested in enhancing the club experience.

Interested in doing other assessments?

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

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

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

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

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



MEMBER SATISFACTION SURVEY

This survey focuses on your day-to-day experiences in our Rotary club. Your input is valuable and will be used by all of us to make our club even better. There are no right or wrong answers; we simply ask for your honest opinions. Thank you for taking this survey.

1. Overall, how satisfied are you with your membership in our Rotary club?

- ☐ Satisfied
- ☐ Somewhat satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Dissatisfied

2. Considering our club's **culture, members, and meetings**, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
Club meetings are a good use of my time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job involving new members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club's members care about one another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club reflects the demographic profile of our area's business, professional, and community leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club actively seeks to involve all members in projects and activities according to their interests, skills, and availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of fundraising activities is appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

3. How would you rate the following aspects of our **weekly meetings**?

	Excellent	Good	Fair	Poor	Very poor	N/A
Rotary International updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time for socializing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional connections and networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of program topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting time and day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals or refreshments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speakers and programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

4. What are your opinions about our club's **service projects**?

	Just right	Too many	Too few
Total number of service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of community service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of international service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Agree	Disagree	No opinion
Service projects are well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects make a difference in the community or the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service projects are meaningful to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

5. Thinking about **communication** and **responsiveness** in our Rotary club, indicate your agreement with the following statements.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
My club does a good job communicating to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club does a good job listening to members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club seeks input and ideas from members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club regularly acts upon members' input and ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am comfortable with the pace of change in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club works to update club processes and rules to meet the needs of its members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

6. Indicate your agreement with the following statements about the **value** of your membership.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I feel welcome in my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I make valuable connections through my club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My club provides opportunities to use my talents and skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the money I spend on Rotary participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My experience as a member is worth the time I give to Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family sees value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends see value in my Rotary membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in my community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through Rotary, I make a difference in the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

7. Indicate your agreement with the following statements about **club engagement**.

	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
I invite my friends, family, and colleagues to club events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I invite qualified prospective members to join my Rotary club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I frequently participate in my club's activities, projects, and programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm proud of my Rotary club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

8. Thinking about the **costs** associated with club membership, how would you rate the following?

	Too low	Just right	Too high	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals at weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for donations for service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requests for contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments and suggestions:

UNDERSTANDING WHY MEMBERS LEAVE



Why are you leaving? This is a question you should ask all members who decide to leave your club. No matter what the answer is, you can use this information to try to prevent the same issue from causing others to leave. Use the Exit Survey on page 6.3 to determine why your members leave and start a conversation about what your club can do to keep members in the future. Your club membership committee can review and tailor the survey to your club's needs. Or you may choose to create an online form or conduct an in-person interview.

OUTCOME

Use exit surveys and act on their results to:

- Determine why members resign from your club
- Address any issues the survey reveals



Consider using an online survey tool. They're convenient, are often free or inexpensive to use, and are helpful in managing response data.

GETTING ORGANIZED

Taking this survey may be the final contact that a member has with Rotary, and it's very important. If you conduct the survey online, put someone in charge of managing the process whenever a member leaves the club. If you use a paper survey or an in-person conversation, ask someone who is a good listener to talk with the resigning member. The interviewer will need to relay the results to the membership committee and club board. Regardless of the method, it's important to make it a positive interaction so that the member leaves with a positive regard for Rotary.

GETTING STARTED

Ready to start? Here's how.

Step 1: Ask permission

Ask the resigning member if he or she is willing to take a confidential exit survey. Explain that the purpose of the survey is to determine whether there are problems that should be addressed to help prevent further losses of valued members and to improve the club for others.

Step 2: Provide the survey

Give the member the survey and ask them to complete it at their earliest convenience. You can edit the survey included in this document and attach it to an email or use an online survey tool. If the member is unable to complete the survey online, use a paper form and provide a stamped, addressed envelope.

Step 3: Discuss the results

Once you receive the completed survey, discuss the results with your club's membership committee. If the member is leaving for a reason other than relocation, discuss what your club can change to prevent current or future members from leaving for similar reasons. Compare this member's responses to those of other recent exit surveys to identify trends. Stress the importance of confidentiality and respect for all viewpoints.

Step 4: Take action

This step is crucial for your club's membership development. You invest time and resources into attracting and engaging members; protect that investment by addressing member losses. While not every exit survey will require action, they do merit consideration. Create a plan and delegate its tasks. Update your club's Member Satisfaction Survey based on the responses of resigning members over the previous year.

Interested in doing other assessments?

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

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

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

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

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

Rotary EXIT SURVEY

We're sorry to lose you as a member of our club. To help us understand why you're leaving and what we can do to improve the club experience, please answer the following questions about your Rotary experience and return the completed survey to your club secretary or president. We appreciate your candid and honest answers.

1. What were your primary reasons for joining the club?

- ☐ Community service
- ☐ International service
- ☐ Personal development
- ☐ Leadership or professional development
- ☐ Family legacy or tradition
- ☐ Status and prestige
- ☐ Social opportunities
- ☐ Networking
- ☐ Opportunity to facilitate international exchange
- ☐ Tutoring and mentoring of youth
- ☐ Reconnecting with Rotary as an alumnus or alumna
- ☐ Other: _____

2. How long have you been a member of the club?

- ☐ Less than 2 years
- ☐ 2-5 years
- ☐ 6-10 years
- ☐ 11-20 years
- ☐ More than 20 years

3. What did you like best about being a member of this club?

What did you like least?

4. How many prospective member information sessions did you attend before you became a member?

- ☐ 1
- ☐ 2
- ☐ 3 or more
- ☐ None, because the club did not offer such sessions
- ☐ None, because I was not interested

5. How many club meetings did you attend before you became a member?

- ☐ 0
- ☐ 1-2
- ☐ 3-4
- ☐ 5 or more

6. How were you informed about club activities and your responsibilities before joining?
(Mark all that apply.)

- ☐ Attended information sessions
- ☐ Received club information from a club officer
- ☐ Received club information from my sponsor
- ☐ I found information on my own

7. Did you learn more about Rotary in a structured way (e.g., new member orientation, continuing education) once you became a member? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all			Definitely		

8. Do you believe you were adequately informed of the financial and time obligations of club membership? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all			Definitely		

9. Were club meetings a worthwhile use of your time? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all			Definitely		

10. Did you feel welcome in the club? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all			Definitely		

11. Did you feel comfortable expressing concerns to club leaders? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all			Definitely		

12. If you did not feel welcome or did not feel comfortable expressing concerns, explain why.

13. How would you describe the club’s culture?

14. What could be done to improve the club experience for new members?

15. Please evaluate meeting logistics.

Meeting logistics	Yes	No
Convenient meeting location	<input type="checkbox"/>	<input type="checkbox"/>
Enjoyable meeting location (atmosphere, service)	<input type="checkbox"/>	<input type="checkbox"/>
Convenient meeting time	<input type="checkbox"/>	<input type="checkbox"/>
Appropriate meeting length	<input type="checkbox"/>	<input type="checkbox"/>
Well-run and organized meetings	<input type="checkbox"/>	<input type="checkbox"/>

16. Please evaluate meeting activities.

Meeting activities	Excessive	Reasonable	Inadequate
Rotary education (on Rotaract, Youth Exchange, Rotary Foundation programs, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Please rate the following aspects of club meetings.

Meeting features	Excellent	Fair	Poor
Program content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to socialize	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. Did you participate in service projects? ☐ Yes ☐ No

19. If no, why not?

- | | |
|---|---|
| <input type="checkbox"/> Type and quality of projects | <input type="checkbox"/> Number of projects |
| <input type="checkbox"/> Personality conflicts | <input type="checkbox"/> Cost |
| <input type="checkbox"/> Schedule conflicts | <input type="checkbox"/> Other: _____ |

20. How satisfying was your participation in service projects? (Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all					Very

21. If your participation in service projects wasn't satisfying, why wasn't it? (Mark all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Lack of variety in projects | <input type="checkbox"/> Lack of quality of projects |
| <input type="checkbox"/> Low quantity of projects | <input type="checkbox"/> Personality conflicts |
| <input type="checkbox"/> Lack of support from other members | <input type="checkbox"/> Insufficient family involvement |
| <input type="checkbox"/> High costs | <input type="checkbox"/> Did not feel welcomed |
| <input type="checkbox"/> Schedule conflicts | <input type="checkbox"/> Other: _____ |

22. Please evaluate your experience of Rotary with respect to your family.

Family of Rotary	Agree	Disagree	Not applicable
Rotary interfered with my family responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family was proud of my involvement in Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My family wanted to be more involved in Rotary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There were opportunities to include my family in club activities and projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. How could your family have been more involved in your Rotary experience?

24. Please evaluate the costs associated with membership.

Cost	Too high	Reasonable	Too low	Not applicable
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meal costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service project contributions (time or monetary)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rotary Foundation contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. How well does the club reflect the demographic profile of professionals in the community?

(Select one.)

1	2	3	4	5	6
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not at all			Very well		

26. Think about what was communicated to you when you joined the club.

Were your expectations met?

27. Why did you decide to terminate your membership?

28. Would you consider joining another Rotary club?

☐ Yes

☐ No

☐ Not sure

29. What is your best advice to the club's leaders as you leave?

30. Do you have any other comments?

Thank you for completing this survey.

Module A-3: Growing and Engaging Your Club Membership

Breakout Room Questions

1. What strategies have you experienced that better attract new members?
2. What helped you get engaged in your club?
3. Refer to p. 38-41 in LYC. What are the keys to engagement from your perspective?
4. Refer to Impact Begins With You in your PETS Workbook.
What can your club do differently to attract/retain Rotary members who can make an impact?
5. Refer to Rotary Harassment Policy worksheet in your PETS Workbook.
What can you do as Club President to create a club atmosphere that is welcoming to all groups?
6. Refer to Rotary Club Health Check, Membership Plan worksheet, and other membership assessment tools in your PETS Workbook.
How can this systematic approach help your club make progress?
7. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
8. What is your **primary takeaway** from the Membership session?
9. Any other question(s)?

Notes

[illegible]

Lone Star P.E.T.S. 2021

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

MONDAY, FEBRUARY 22, 2021

MODULE A-4 INCREASING HUMANITARIAN SERVICE BY SUPPORTING OUR FOUNDATION

GOAL

Club Presidents and Presidents-Elect will possess tools necessary to increase humanitarian service accomplished by their clubs by developing club member support for The Rotary Foundation.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Explain how support for The Rotary Foundation can help increase humanitarian service
2. Explain how participation in programs of The Rotary Foundation help attract, engage, and retain members
3. Identify the good works accomplished through our Foundation
4. Identify types of individual and club recognitions for giving to our Foundation

REFERENCE MATERIALS

Lead Your Club: President - Chapter 7: The Rotary Foundation



ROTARY'S AREAS OF FOCUS





The work of Rotary begins in the community, and every community has its own unique needs and concerns. While we serve in countless ways, we've focused our efforts in six key areas to maximize our impact. These areas encompass some of the world's most critical and widespread humanitarian needs, and we have a proven record of success in addressing them:

- Peace and conflict prevention/resolution
- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development



Rotary members planning new service projects are encouraged to consider these areas and the many opportunities for innovative projects within them. This publication introduces each area and suggests how Rotary clubs and districts and their service partners can address these needs both locally and internationally.

ROTARY FOUNDATION GLOBAL GRANTS AND THE AREAS OF FOCUS

All Rotary clubs and districts are eligible to apply for global grants from The Rotary Foundation to support sustainable activities with high-impact outcomes in one or more of the six areas of focus. These activities may include humanitarian projects, scholarships, and vocational training teams. Prospective global grant-funded projects should include a plan for monitoring and evaluation using the measures established by the Foundation for each area. Learn about the criteria for global grants in each area by consulting the Areas of Focus Policy Statements at Rotary.org.

ROTARY SHOWCASE

Interested in seeing how other clubs are making an impact in Rotary's areas of focus? Check out Rotary Showcase (www.rotary.org/showcase), a tool that lets you view, share, and publicize Rotary service projects. Find inspiration from other clubs' success stories and add your own project to show the world how your club is making a difference.



PEACE AND CONFLICT PREVENTION/RESOLUTION

RESPONDING TO CONFLICT

20,000 people

are maimed or killed by land mines each year.

TAKE ACTION

Identify triggering or accelerating factors in the conflict and work to mitigate them.



TAKE ACTION

Offer support to marginalized groups that are at risk of violence or persecution.

51 million people

are currently displaced by armed conflict or persecution.

TAKE ACTION

Provide relief to those who have fled areas of conflict.

TIPS FOR SUCCESS

- 1 Plan projects to engage all community stakeholders, including women, marginalized populations such as ethnic or religious minorities, and opposing sides in conflicts.
- 2 Understand and respect the laws and customs of all the communities you serve.

TAKE ACTION

Help children who have been orphaned, injured, or traumatized by conflict.

90% of casualties

in armed conflicts are civilians, at least half are children.

PREVENTING CONFLICT/BUILDING PEACE

300,000 child soldiers

(boys and girls under age 18) are believed to be involved in conflicts around the world.

TIPS FOR SUCCESS

- 1 Use role-playing and sports to teach children and young adults socially appropriate ways of dealing with conflict.
- 2 As a component of service projects, train community leaders in strategies to prevent and mediate conflict, such as facilitating community dialogue and initiating alternative dispute resolution.
- 3 Partner with Rotary Peace Fellows and other conflict-prevention experts and organizations.

TAKE ACTION

Incorporate conflict resolution and mediation strategies into service projects involving local schools, orphanages, workplaces, and community centers.

TAKE ACTION

Recruit candidates for a Rotary Peace Fellowship. Up to 100 peace fellowships are offered annually at Rotary Peace Centers at universities around the world.

TAKE ACTION

Participate in fellowship and service activities with Rotary clubs in other parts of the world to promote understanding and peace.

TAKE ACTION

Pursue projects that **address the underlying causes of conflict**, including poverty, inequality, ethnic tensions, lack of access to education, and unequal distribution of resources.



DISEASE PREVENTION AND TREATMENT

DISEASE PREVENTION

1 billion people

suffer from neglected tropical diseases such as dengue fever and leprosy each year.

TIPS FOR SUCCESS

- 1 Consult with Rotary members who have medical or public health expertise.
- 2 Communicate with local and regional hospitals, clinics, universities, and ministries of health to avoid duplicating efforts and to take advantage of local resources.
- 3 Enlist community workers and health and medical volunteers to perform immunizations.
- 4 Partner with successful community-based health care organizations to strengthen and expand existing services.

TAKE ACTION

Support health education programs that explain how diseases are spread, and promote ways to reduce the risk of transmission.

TAKE ACTION

Help immunize people against infectious diseases.



HEALTH CARE

2.4 million doctors,

nurses, midwives, and other skilled caregivers are needed worldwide.

57 countries

have fewer than 23 health workers for every 10,000 people.

TIPS FOR SUCCESS

- 1 Work with local health centers to develop programs that attract health workers with a variety of skills. A shortage in a particular skill area can burden health center staff and limit the care available.
- 2 Ensure that training facilities are located where the workforce lives and works in order to improve retention rates.

TAKE ACTION

Support continuing education and training for health workers through scholarships, stipends, and public recognition.

100 million people

are pushed into poverty each year by medical costs.

1 in 6 people

worldwide cannot pay for health care.

TIPS FOR SUCCESS

- 1 Focus on providing long-term support for community health centers.
- 2 Partner with global health systems to increase access to equipment, facilities, and the latest health care programs.
- 3 Incorporate innovative technologies such as mHealth, which can be accessed on mobile wireless devices, to extend the reach of health centers.

TAKE ACTION

Improve and expand access

to low-cost and free health care in underserved areas.



WATER AND SANITATION

SANITATION AND HYGIENE

2.5 billion people

lack access to improved sanitation.

TAKE ACTION

Improve sanitation facilities by

providing toilets and latrines that flush into a sewer or safe enclosure.

1,400 children

die each day from diseases caused by lack of sanitation and unsafe water.

TIPS FOR SUCCESS

- 1 Avoid prescribing a solution for a community. Instead, work with the community to determine what is most appropriate.
- 2 Remember sanitation and hygiene: Very few people die from thirst; millions die from preventable waterborne diseases.



TAKE ACTION

Promote good hygiene habits

through education. Proper hand washing with soap and water can reduce diarrhea cases by up to 35 percent.



IMPROVE WATER QUALITY AND ACCESS TO WATER



TAKE ACTION

Build wells

to extract groundwater from underground aquifers.

6 hours

per day is what women in some rural parts of Africa spend collecting water from a remote source.

TAKE ACTION

Promote low-cost solutions, such as chlorine tablets or plastic bottles that can be exposed to sunlight, to improve water quality.

748 million people

don't have clean drinking water.

TIPS FOR SUCCESS

- 1 Work with the community to establish a water committee and a fee system to allow for ongoing operation and maintenance of the water system.
- 2 Before digging or drilling a new well, plan carefully to ensure that the water will be safe and the well is environmentally sustainable.
- 3 Utilize government-approved technology and equipment so that spare parts and repair work will be readily available.

TAKE ACTION

Implement rainwater harvesting systems to collect and store rainwater for drinking or recharging underground aquifers.

TAKE ACTION

Provide home water treatment capability, through the use of filters, solar disinfection, or flocculants, to make drinking water safe.





MATERNAL AND CHILD HEALTH

CHILD HEALTH CARE



TAKE ACTION

Develop or support programs that **provide immunizations and antibiotics**. Measles, malaria, pneumonia, AIDS, and diarrheal diseases are the leading causes of death in children under five.

6.3 million children

under the age of five die each year from diseases, malnutrition, poor health care, and inadequate sanitation.

TAKE ACTION

Prevent mother-to-infant HIV transmission

by encouraging the use of antiretroviral drugs and formula feeding.



TAKE ACTION

Include water, sanitation, and hygiene efforts

to maximize child nutrition. Diarrheal diseases caused by contaminated water exacerbate malnutrition in children.



TAKE ACTION

Promote good nutrition, including encouraging breastfeeding for most infants.



REPRODUCTIVE HEALTH

222 million women

who would prefer to delay or avoid childbearing lack access to safe and effective contraception.

TAKE ACTION

Provide information about — and access to — contraceptives. Just filling the unmet need for contraception could reduce the number of maternal deaths by nearly one-third.

TIP FOR SUCCESS

Take time to understand prospective beneficiaries' beliefs surrounding contraception and foster an environment of open, nonjudgmental communication to build good working relationships in the community.

ANTENATAL CARE AND CHILDBIRTH

TAKE ACTION

Provide birthing kits to health professionals.



Women in sub-Saharan Africa face a

1 in 39 lifetime risk

of dying of pregnancy- or childbirth-related complications.

80% of maternal deaths

could be prevented with access to reproductive health services and trained health care workers.

TAKE ACTION

Support accredited training programs for health professionals.

TIPS FOR SUCCESS

- 1 Ensure sustainability by empowering the local community to take ownership of health training programs.
- 2 Consult Rotary members who are trained in maternal and newborn health care, such as midwives, obstetricians, and gynecologists.
- 3 Partner with local organizations that have expertise in maternal and child health.





BASIC EDUCATION AND LITERACY

TEACHER TRAINING

1.7 million additional teachers

are needed worldwide to meet the goal of universal primary education.

TIPS FOR SUCCESS

- 1 Develop long-term relationships with teachers to ensure that they have access to the latest training and materials.
- 2 Consult with education officials to design teacher training programs and curriculums.

TAKE ACTION

Provide teacher training and needed classroom supplies.

TAKE ACTION

Send a vocational training team to offer curriculum development training in rural communities.



SUPPORTING STUDENTS

TAKE ACTION

Volunteer

in a classroom
or after-school
program.



57 million children

worldwide are not in school.

TAKE ACTION

Support concentrated language encounter

(CLE) literacy programs. These low-cost text- or activity-based immersion programs can be effective with adults as well as children.

TAKE ACTION

Develop an **adult literacy program.**

781 million people

over the age of 15 —
60 percent of them women —
are illiterate.

TAKE ACTION

Serve as a mentor to students in your community.



TAKE ACTION

Promote student enrollment and prevent health-related absences by sponsoring school meal programs and providing safe drinking water and sanitation facilities.

TIPS FOR SUCCESS

- 1 Remove barriers to girls' education caused by cultural attitudes, safety concerns, and the need for girls to contribute to the household economy. Gender equality is vital to sustainable community development.
- 2 Involve students, parents, teachers, and administrators to gain support for your endeavors.
- 3 Partner with local organizations that can offer advice and resources to help you organize a CLE program.





ECONOMIC AND COMMUNITY DEVELOPMENT

INCOME GENERATION AND SAVINGS

190 million people

are funding their business endeavors through microfinance.

TAKE ACTION

Partner with a local microlender

to improve access to financial services and provide financial infrastructure in the community.

TAKE ACTION

Develop mobile banking resources

in partnership with a microlender. Cell phones, which can be used to make deposits and transfer funds, can increase access to banking systems in developing communities.

TIPS FOR SUCCESS

- 1 When supporting service projects in a developing community, purchase goods and supplies locally to stimulate the economy and avoid unnecessary shipping fees.
- 2 Establish a Rotary Community Corps (RCC) and empower members to take action. RCC members are in a unique position to identify barriers to the community's economic progress and develop sustainable solutions.

JOB CREATION AND ENTREPRENEURSHIP

1.4 billion people

— nearly half of them employed —
live on less than \$1.25 a day.

TAKE ACTION

Expand vocational training

opportunities, including job placement programming, at local nonprofit organizations.

TIP FOR SUCCESS

Support entrepreneurs and small businesses in developing communities. The success of local business leaders can multiply employment opportunities in the community.

TAKE ACTION

Partner with a cooperative that provides training, joint economic ventures, and ownership of assets to its members through a democratic structure.

TAKE ACTION

Send a vocational training team to teach business leaders in developing communities how to create a business plan and maintain accurate financial accounting.

TAKE ACTION

Provide equipment or supplies to a cooperative to increase production and sales in the local market.





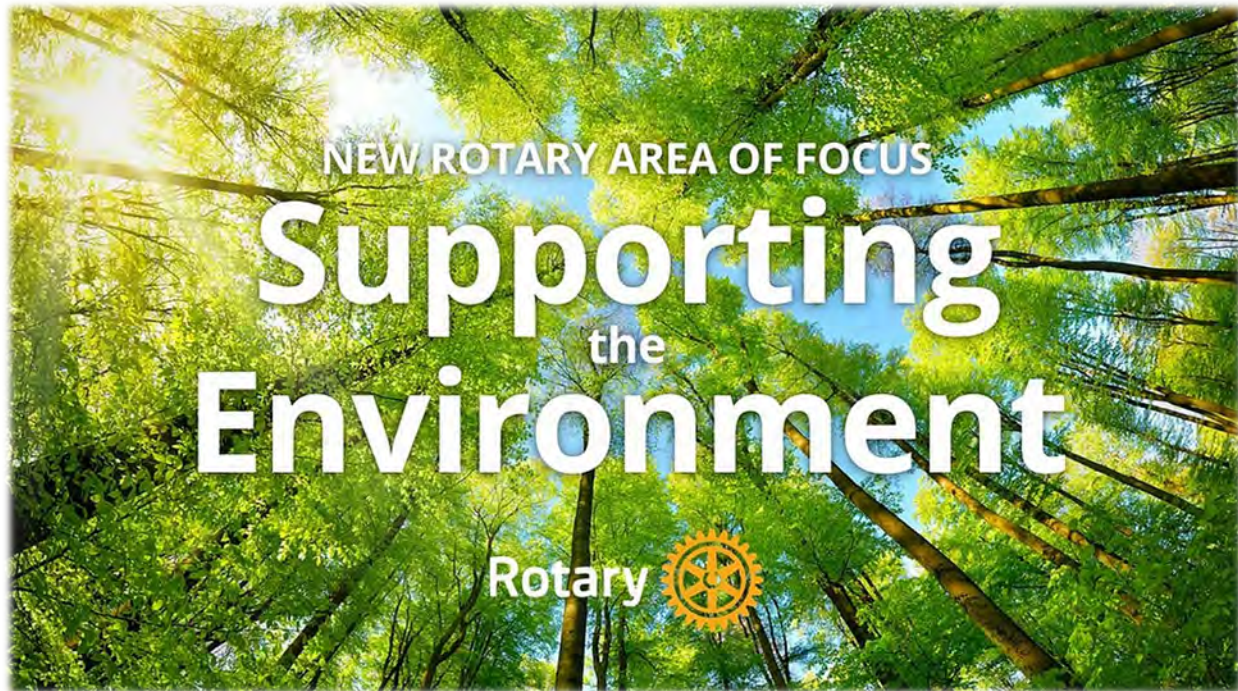
ADDITIONAL RESOURCES

Consult the Lifecycle of a Project resources at Rotary.org for information about conducting a service project, including community assessments, collaborating with others, sustainability strategies, and evaluation methods.



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Supporting the environment becomes a new area of focus

The Rotary Foundation Trustees and Rotary International Board of Directors have added a new area of focus: supporting the environment.

More than \$18 million in Foundation global grant funding has been allocated to environment-related projects over the past five years. Creating a distinct area of focus to support the environment will give Rotary members even more ways to bring about positive change in the world and increase our impact.

Supporting the environment becomes Rotary's seventh area of focus, which are categories of service activities supported by global grants. It joins peacebuilding and conflict prevention; disease prevention and treatment; water, sanitation, and hygiene; maternal and child health; basic education and literacy; and community economic development.

Grant applications for projects will be accepted beginning on 1 July 2021. Gifts and commitments from Rotarians and others will be sought to provide global grant support for the new area of focus. More information about this new area of focus will be announced soon.

26-Jun-2020



AREAS OF FOCUS POLICY STATEMENTS

The Rotary Foundation strives to process grants efficiently and ensure the quality of grant-funded projects. In each policy statement, **you'll find lists of** eligible and ineligible activities, including examples of the types of projects that Rotary clubs and districts have successfully implemented. All grant requests must comply with the policy statement related to their intended area of focus. Project planning is the responsibility of the host club or district.

PEACEBUILDING AND CONFLICT PREVENTION

Rotary supports training, education, and practices related to peacebuilding and conflict prevention through initiatives that help transform¹ conflict in our communities and around the world.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to advance peacebuilding and prevent conflict by:

1. Enhancing the capacity of individuals and communities to transform conflict and build peace
2. Training community members in peace education, peace leadership, and conflict prevention and resolution
3. Providing services that help integrate vulnerable populations into society
4. Improving dialogue and community relations to determine how best to manage natural resources
5. Funding graduate scholarships for career-minded professionals related to peacebuilding and conflict prevention

Parameters for Eligibility

TRF considers the following activities to be within the scope of the peacebuilding and conflict prevention area of focus:

1. Group activities including workshops, trainings, and other programs that support peace leadership and education, Positive Peace,² community integration of vulnerable populations,

¹ Conflict transformation involves identifying and working with the underlying conditions, relationships, and social structures that give rise to conflict. Through this process, one moves beyond conflict resolution or management to change the environment that has led to conflict. This focus on transformation helps ensure sustainable peace.

² Rotary has a strategic partnership with the Institute for Economics and Peace to help address the underlying causes of conflict and create conditions that foster peace. [Learn more](#) about our work in Positive Peace.

facilitated dialogue, communication, and conflict prevention and transformation

2. Education for youth on constructive ways to prevent, manage, and transform conflict, including after-school or community-based programming with robust peacebuilding and conflict-diversion activities
3. Training programs or campaigns to address conflict, or the risk of conflict, related to the use and management of natural resources
4. Legal, psychological, social, and rehabilitative services that help integrate vulnerable populations into society, including at-risk youth, refugees, trafficked people, and others affected by conflict or violence

TRF considers the following activities to be outside the scope of the peacebuilding and conflict prevention area of focus and not eligible for global grant funding:

1. Peace conferences in which Rotarians are the primary participants
2. Programs with a sole focus on music, sports, or extracurricular activities. Programs must have robust peacebuilding and conflict-diversion aspects to receive global grant funding.
3. Enrollment at a Rotary Peace Center partner university in the same, or similar, academic program as those pursued by Rotary Peace Fellows

Elements of Successful Humanitarian Projects and Vocational Training Teams

Peacebuilding and conflict prevention global grants are:

1. Sustainable — Communities can continue to make progress in peacebuilding and conflict prevention after the Rotary clubs or districts complete their work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures for peacebuilding and conflict prevention are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in peacebuilding and conflict prevention. TRF considers the following when evaluating global grant scholarship applications:

1. **The applicant's previous** professional experience in peacebuilding and conflict prevention, including work or research with nongovernmental organizations, governmental agencies, or international associations
2. The academic program's **alignment** with peacebuilding and conflict prevention
 - a. Preferred academic programs include conflict prevention and resolution, peace and justice studies, social entrepreneurship related to peace, security studies, international relations, and

- other degrees with a specialization in peace and conflict, such as human rights law.
- b. Programs that focus directly on peace and conflict issues and outcomes will be considered favorably.
 - c. Programs that will not be considered favorably include those related to general international relations with no emphasis on peacebuilding, conflict transformation, or conflict prevention and resolution, as well as other general social development degrees.
3. **The applicant's career plans as they relate to peace and conflict transformation, prevention, and resolution**

DISEASE PREVENTION AND TREATMENT

Rotary supports activities that reduce the causes and effects of disease. Projects strengthen the health care system³ by improving access to and expanding medical services, providing medical equipment, or training health care personnel.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to prevent and treat disease and support health by:

1. Improving the capacity of local health care professionals
2. Promoting disease prevention and treatment programs that limit the spread of communicable diseases and reduce the incidence and effect of noncommunicable diseases
3. Strengthening health care systems
4. Providing clinical treatment and rehabilitation for physical disabilities
5. Funding graduate scholarships for career-minded professionals related to disease prevention and treatment

Parameters for Eligibility

TRF considers the following activities to be within the scope of the disease prevention and treatment area of focus:

Prevention and Control of Communicable Diseases

1. Disease testing through projects such as health fairs, provided they include counseling and referrals or help admit patients for treatment
2. Educating community members and health care professionals about intervention strategies for preventing disease transmission
3. Providing equipment specifically to offer health care services to remote populations that lack access to the local primary care system
4. Supplying medical equipment to health care facilities. Equipment must meet current technology standards and satisfy environmental criteria for power, water, and air quality. Grant sponsors must provide proof of ownership and operational and maintenance plans, including documentation showing that personnel have received training on equipment operation and maintenance, or a training plan that ensures compliance with these requirements.
5. Providing surveillance systems, along with training, to track and monitor the diagnosis and treatment of disease
6. Treating communicable diseases through an approach that also helps prevent disease, improve the training of medical professionals, or enhance public health education to promote a **community's** long-term well-being

³ A health care system includes both the public and private sectors engaged in the delivery of health services.

7. Preventing and controlling illnesses transmitted by mosquitoes and other vectors. High-priority projects will include identifying environmental hazards specific to vector-borne diseases and remedial strategies.
8. Addressing environmental hazards related to infection and disease containment, such as disposal of medical waste in health care facilities

Prevention and Control of Noncommunicable Diseases

1. Offering prevention and treatment services for physical and mental illnesses and related disabilities
2. Developing community education and early screening and treatment programs designed to reduce the incidence and prevalence of chronic diseases
3. Providing equipment specifically to offer health care services to remote populations that lack access to the local primary care system
4. Supplying medical equipment to health care facilities. Equipment must meet current technology standards and satisfy environmental criteria for power, water, and air quality. Grant sponsors must provide proof of ownership and operational and maintenance plans, including documentation showing that personnel received training on equipment operation and maintenance, or a training plan that ensures compliance with these requirements.
5. Providing lifesaving surgeries and surgeries to address congenital problems, provided they include assessing the beneficiary and ensuring follow-up care
6. Treating noncommunicable diseases, including mental illness, through an approach that also helps prevent disease, train health service professionals, or enhance public health education with measurable outcomes to promote **a community's** long-term well-being
7. Preventing traffic- or vehicle-related injuries, provided these projects can demonstrate measurable reductions in such injuries
8. Supplying vehicles, personnel, and equipment to provide emergency medical services. Ambulances must be new and purchased locally and include documentation of ownership, operation, maintenance, repair, and security systems by the appropriate health care facility.

TRF considers the following activities to be outside the scope of the disease prevention and treatment area of focus and not eligible for global grant funding:

1. Projects that consist exclusively of purchasing furniture, supplies, consumables, or nonmedical equipment, such as solar panels
2. Medical missions or surgical team trips that do not provide educational outreach programs or significant capacity-building in the project country, with the exception of lifesaving surgeries and surgeries to address congenital problems
3. Eco-stove or indoor stove-top projects

4. Nonconventional or alternative therapies for treating physical and mental disabilities, unless they include clinical protocols supervised by health care professionals
5. Treatment of pervasive developmental disorders and other spectral disorders, including autism, unless there are measurable clinical interventions that demonstrate an improvement of the disorder's long-term impact
6. Nutrition programs, unless they target clinical malnutrition or interventions in the first 1,000 **days between a woman's pregnancy and her child's** second birthday
7. Introduction of new technology without documentation of its prior successful use in the project area and appropriate operations, maintenance, replacement, and repair systems in place
8. General health education and public safety programs

Elements of Successful Humanitarian Projects and Vocational Training Teams

Disease prevention and treatment global grants are:

1. Sustainable — Communities can address their disease prevention and treatment needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures for disease prevention and treatment are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community-driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers related to disease prevention and treatment. TRF considers the following when evaluating global grant scholarship applications:

1. **The applicant's previous work experience in the field of disease prevention and treatment**
2. The academic **program's alignment** with disease prevention and treatment, such as public health and advanced degrees in nursing and medicine
3. **The applicant's career plans as they relate to disease prevention and treatment**

WATER, SANITATION, AND HYGIENE

Rotary supports activities that encourage the management and protection of freshwater resources and provide universal and equitable access to safe drinking water, sanitation, and hygiene. TRF seeks to empower governments, institutions, and communities to manage their water, sanitation, and hygiene services through environmentally sound, measurable, and sustainable interventions.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure **communities'** sustainable access to water, sanitation, and hygiene by:

1. Facilitating universal and equitable access to safe and affordable drinking water
2. Improving water quality by protecting and maintaining surface- and groundwater resources, reducing pollution and contaminants, and promoting wastewater reuse
3. Facilitating universal and equitable access to improved sanitation and waste management services in order to achieve open defecation-free communities
4. Improving community hygiene knowledge, behaviors, and practices that help prevent the spread of disease
5. Strengthening the capacity of governments, institutions, and communities to develop, finance, manage, and maintain sustainable water and sanitation services
6. Funding graduate scholarships for career-minded professionals related to water, sanitation, and hygiene

Parameters for Eligibility

TRF considers the following activities to be within the scope of the water, sanitation, and hygiene area of focus:

1. Ensuring access to safe drinking water, including projects focused on water supply, storage, purification, treatment, and source water protection
2. Ensuring access to improved sanitation, defined as the collection, treatment, and disposal of human excreta or urine through sanitation infrastructure and fecal-sludge management, treatment, and disposal
3. Providing hygiene education that promotes healthy behaviors such as hand washing, safe disposal of human waste, safe water storage, and proper menstrual hygiene. The program must identify the factors that prevent or encourage positive behaviors and describe how to address barriers.
4. Providing solid waste management systems, defined as the process of collecting, treating and disposing of solid waste materials
5. Using watershed management practices to protect source water and recharge surface and groundwater resources
6. Supplying water for crop, livestock, and fisheries production
7. Developing sustainable management practices to support water and sanitation services, including

community governance, financing and planning, system maintenance, and delivery

8. Organizing strategic advocacy initiatives to encourage regional, national, and local authorities to implement policies that support sustainable access to water, sanitation, and hygiene. These include allocating funding for related services, establishing standards and guidelines, and developing processes for certifying communities as open defecation-free.

TRF considers the following activities to be outside the scope of the water, sanitation, and hygiene area of focus and not eligible for global grant funding:

1. Hygiene programming that focuses on increasing knowledge and providing standardized information rather than changing behavior. One-time education sessions are not eligible.
2. Single-event river or beach clean-ups that are not part of a watershed management project
3. Projects that solely construct water and sanitation systems

Elements of Successful Humanitarian Projects and Vocational Training Teams

Water, sanitation, and hygiene global grants are:

1. Sustainable — Communities and governments can better address their water, sanitation, and hygiene needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes in water, sanitation, and hygiene and water resource management. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community. Governments, communities, and businesses work together to build, own, and operate sustainable water and sanitation systems.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in water, sanitation, and hygiene. TRF considers the following when evaluating global grant scholarship applications:

1. **The applicant's previous work experience in the field of water**, sanitation, and hygiene or water resource management
2. The academic **program's alignment** with water, sanitation, and hygiene or water resource management. Examples include water and sanitation engineering, environmental engineering, integrated water resource and systems management, hydrology, and public health.
3. **The applicant's career plans as they relate to water and sanitation**

MATERNAL AND CHILD HEALTH

Rotary supports activities and training to improve maternal health and reduce mortality for children under five. Projects strengthen the health care system⁴ by improving access to and expanding medical services, providing medical equipment, and training health care personnel.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to improve the health of mothers and their children by:

1. Reducing the neonatal and newborn mortality rate
2. Reducing the mortality and morbidity rate of children under five
3. Reducing the maternal mortality and morbidity rate
4. Improving access to essential medical services, trained community health workers, and health care providers
5. Funding graduate scholarships for career-minded professionals related to maternal and child health

Parameters for Eligibility

TRF considers the following activities to be within the scope of the maternal and child health area of focus:

1. Maternal prenatal, delivery, and antenatal care
2. **Training or “train the trainer” initiatives for maternal and child community health** care workers and medical professionals
3. Projects that provide medical equipment to health care facilities. Equipment must meet current technology standards and satisfy environmental criteria for power, water, and air quality. Grant sponsors must provide proof of ownership and operational and maintenance plans, including documentation showing that personnel received training on equipment operation and maintenance, or a training plan that ensures compliance. Equipment projects must include educational activities for women related to healthy pregnancy, delivery, or neonatal care.
4. Education about and enhanced access to family planning and other sexual and reproductive health interventions and services available through the health care system
5. Immunizations for women, adolescent girls, and children under five
6. Interventions to combat pneumonia, diarrhea, malaria, measles, and other major causes of disease in women and children under five
7. Interventions to reduce the transmission and impact of sexually transmitted disease in adolescents and women

⁴ A health care system includes both the public and private sectors engaged in the delivery of health care services.

8. Prevention of mother-to-child transmission of HIV
9. Projects that promote breastfeeding and other actions that prevent, reduce, and treat the effects of malnutrition
10. Lifesaving surgeries and surgeries to address congenital problems, provided they include assessing the beneficiaries and ensuring follow-up care
11. Projects that address environmental hazards related to the containment of infection and transmission of disease, such as the disposal of medical waste in health care facilities

TRF considers the following activities to be outside the scope of the maternal and child health area of focus and not eligible for global grant funding:

1. Medical missions and surgical team trips that do not provide significant capacity-building in the project country, except for lifesaving surgeries and surgeries to address congenital problems
2. Garden projects, food supplements, and school-based nutrition programs
3. Eco-stove or indoor stove-top projects
4. Playgrounds and general childhood exercise and wellness projects
5. Nonconventional or alternative therapies for treatment of physical and mental disabilities, unless they include clinical protocols supervised by health care professionals
6. Sexual and reproductive health projects for adolescents, unless they are carried out within the health care system under the supervision of licensed medical professionals
7. Furniture, supplies, and consumables, unless they are part of a larger maternal and child health project that meets the eligibility parameters for global grants
8. General health education and public safety programs

Elements of Successful Humanitarian Projects and Vocational Training Teams

Maternal and child health global grants are:

1. Sustainable — Communities can address their maternal and child health needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community-driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers related to maternal and child health. TRF considers the following when evaluating global grant scholarship applications:

1. **The applicant's previous work experience** in the field of maternal and child health
2. **The academic program's alignment** with maternal and child health. Examples include epidemiology, nutrition, global health, public health, and health promotion, as well as advanced degrees in nursing and medicine.
3. **The applicant's career plans as they relate to maternal and child health**

BASIC EDUCATION AND LITERACY

Rotary supports activities and training to improve education for all children, and literacy for children and adults.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to ensure that all people have sustainable access to basic education and literacy by:

1. Supporting programs that strengthen a **community's ability to provide basic education and literacy** to all
2. Increasing adult literacy
3. Working to reduce gender disparity in education
4. Funding graduate scholarships for career-minded professionals related to basic education and literacy

Parameters for Eligibility

TRF considers the following activities to be within the scope of the basic education and literacy area of focus:

1. Improving academic outcomes at the early childhood, primary, and secondary levels, in collaboration with local school officials
2. Educating adults in reading, writing, and numeracy skills
3. Providing professional development opportunities for teachers with a qualified trainer in curriculum implementation, effective instructional methods, or student assessments
4. Strengthening basic educational outcomes by providing improved learning materials and facilities supported by enhanced curricula and new professional development for teachers
5. Improving academic support for before- and after-school programs by training tutors and teachers, conducting student assessments, and providing equipment if needed
6. Supporting **educators' ability to** help students with physical or developmental disabilities achieve greater academic outcomes by providing professional development opportunities for teachers and staff, as well as basic educational materials and enhanced facilities if needed

TRF considers the following activities to be outside the scope of the basic education and literacy area of focus and not eligible for global grant funding:

1. Projects that consist exclusively of infrastructure, vehicles, or equipment purchases, and training on their use
2. Projects that provide salaries, tuition, or school supplies without the means for the community or non-Rotary entity to maintain these in the future
3. Projects that purchase only extracurricular or play materials or playgrounds

4. Projects that focus on school feeding or providing infrastructure and equipment for school feeding programs
5. Projects the community is not able to sustain after grant funding ends
6. Projects that benefit only one cohort of students, such as tutoring or after-school programs that will function only during the life of the grant

Elements of Successful Humanitarian Projects and Vocational Training Teams

Basic education and literacy global grants are:

1. Sustainable — Communities can address their basic education and literacy needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in basic education and literacy. TRF considers the following when evaluating global grant scholarship applications:

1. **The applicant's previous work experience in the field of basic education and literacy**
2. The academic **program's alignment** with basic education and literacy. Examples include education, literacy, curriculum development, special education, and school administration.
3. **The applicant's future career plans as they relate to basic education and literacy**

COMMUNITY ECONOMIC DEVELOPMENT

Rotary supports investments in people and communities to alleviate poverty, creating measurable and enduring economic improvements in poor and underserved areas.

Area of Focus Statement of Purpose and Goals

TRF enables Rotarians to alleviate poverty by:

1. Building the capacity of local leaders, organizations, and networks to support economic development in poor communities
2. Developing opportunities for productive work and improving access to sustainable livelihoods
3. Empowering marginalized communities by providing access to economic opportunities and services
4. Building the capacity of entrepreneurs, social businesses, and locally supported business innovators
5. Addressing gender or class disparities that prevent populations from obtaining productive work and accessing markets and financial services
6. Increasing access to renewable energy and energy-efficiency measures to create more sustainable and economically resilient communities
7. Empowering communities to develop environmental and natural resource conservation skills for economic gain
8. Strengthening **communities'** economic resilience and adaptive capacity⁵ in response to environmental and climate-related hazards and natural disasters
9. Developing and supporting community-based basic emergency preparedness services to improve economic resilience
10. Funding graduate scholarships for career-minded professionals related to community economic development

Parameters for Eligibility

TRF considers the following activities to be within the scope of the community economic development area of focus:

1. Providing poor communities with access to financial services, including microcredit, mobile banking, savings, and insurance
2. Offering training related to community economic development, including entrepreneurship, community leadership, vocational skills, and financial literacy

⁵ Adaptive capacities refer to the social and technical skills of individuals and groups that allow them to respond effectively to environmental and socioeconomic changes.

3. **Developing community members' economic and** employment potential through leadership training and empowerment tools, especially through initiatives for women, refugees, and young adults
4. Supporting small-business, cooperative, or social-enterprise development and income-generating activities for the poor, including organizing area-wide businesses that provide employment
5. Furthering agricultural development for subsistence and small farmers, including building capacity and facilitating access to financial markets and capital
6. Organizing community-led and -coordinated adopt-a-village initiatives, or comprehensive community development activities
7. Supporting equal and effective economic opportunities for women, refugees, and other marginalized populations
8. Providing access to renewable, clean, and efficient energy through sustainable, locally purchased, and innovative technology, as well as substantial training directly connected to economic outcomes
9. Training communities in conservation and resource management to help them preserve, protect, and sustainably use natural resources for their economic benefit and growth
10. Improving **communities'** ability to adapt to environmental and climatic changes through capacity-building, and developing sustainable economic activities
11. Providing training and basic resources to support basic emergency preparedness initiatives and enhance **communities'** economic resilience, including fire prevention and natural disaster preparedness

TRF considers the following activities to be outside the scope of the community economic development area of focus and not eligible for global grant funding:

1. Community infrastructure or equipment projects without direct economic results, or without operational and maintenance plans
2. Community beautification projects such as parks and playgrounds
3. Projects to rehabilitate community centers

Elements of Successful Humanitarian Projects and Vocational Training Teams

Community economic development global grants are:

1. Sustainable — Communities can address their economic development needs after the Rotary club or district completes its work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes. Standard measures are listed in the [Global Grant Monitoring and Evaluation Plan Supplement](#).
3. Community driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers in community economic development. TRF considers the following when evaluating global grant scholarship applications:

1. **The applicant's previous work experience in the field of community economic development.**
Applicants are expected to demonstrate how their work contributed to the economic well-being of poor, low-income, or underserved communities at the local, regional, or national level.
2. The academic **program's alignment** with community economic development
 - a. Examples include social science degrees with a focus on community economic development and business degrees tailored to social business, micro-entrepreneurship, or microcredit
 - b. Programs that will be favorably considered include those that:
 - i. Emphasize local, regional, or national economic development strategies
 - ii. Focus on addressing economic issues of poor, low-income, and underserved communities
 - iii. Support social business development, such as a specialized track within a master of business administration program
 - iv. Provide a business degree to teach entrepreneurial skills or support startups at the local, regional, or national level
 - v. **Include "community development" in the name of the program or** specialized track
 - vi. Improve the coaching or advising capability of an individual working with small businesses or entrepreneurs
 - vii. Focus on strategies to address environmental issues that affect poor, low-income, and underserved communities, such as resource management, environmental and conservation studies, resilience planning, and preparedness
 - viii. Use urban planning principles to guide economic development strategies
 - c. Programs that will not be favorably considered include those that:
 - i. Focus on purely theoretical, macro-level economics, politics, or finance
 - ii. Support general private business development, such as a master of business administration for professions unrelated to social enterprise
3. **The applicant's career plans as they relate to community economic development**
 - a. Careers that will be considered favorably include those that:
 - i. Improve the economic and social well-being of poor, low-income, and underserved communities at the local, regional, and national level
 - ii. Are in a nonprofit or social enterprise environment
 - iii. Support advocacy for economic and social well-being (e.g. for poor communities, youth, women, indigenous peoples, refugees, and other underserved populations)

- iv. Address environmental issues that affect poor, low-income, and underserved communities through strategies including resource management, environmental and conservation studies, resilience planning, and preparedness
- b. Careers that will not be considered favorably include general roles in business, engineering, or social work, or general administration in a private or corporate environment.

ENVIRONMENT (COMING JULY 2021)

Rotary supports activities that strengthen the conservation and protection of natural resources, advance environmental sustainability, and foster harmony between people and the environment.

Area of Focus Statement of Purpose, Goals, and Parameters for Eligibility

The Rotary Foundation enables Rotary members to protect, preserve, and conserve the environment by:

1. Protecting and restoring land, coastal, marine, and freshwater resources
 - a. Protecting and restoring terrestrial ecosystems and improving their resiliency through initiatives such as promoting reforestation, preventing deforestation, planting native vegetation, restoring habitats, and removing invasive plant and animal species
 - b. Preserving biodiversity by protecting and restoring habitats, conserving native species, removing invasive plant and animal species, conserving and protecting endangered species, and preventing poaching and the illegal wildlife trade
 - c. Supporting strategies and targeted initiatives to improve aquifer and groundwater recharging, water conservation, water quality, sanitation, and watershed management (adhering to the policy statements and guidelines for the water, sanitation, and hygiene area of focus)
 - d. Protecting and restoring coastal, marine, and freshwater ecosystems through initiatives such as habitat restoration, protecting and propagating native plant and animal species, removing invasive plant and animal species, addressing overfishing, pollution, coastal erosion and ocean acidification
2. Enhancing the capacity of communities and local governments to support natural resource management and conservation
 - a. Developing peacebuilding and conflict prevention initiatives related to the management and use of natural resources (adhering to the policy statements and guidelines for the peacebuilding and conflict prevention area of focus)
 - b. Mitigating human-wildlife conflict through ecologically sound and peaceful resolutions
 - c. Training and educating communities in conservation and resource management to preserve, protect, and sustainably use natural resources
3. Supporting agroecology and sustainable agriculture, fishing, and aquaculture practices to improve ecological health
 - a. Creating awareness of and supporting ecologically viable agriculture through activities such as regenerative agriculture, conservation agriculture, managed grazing, silvopasture, and tree intercropping
 - b. Supporting sustainable fisheries and ecologically sound aquaculture (adhering to the policy statements and guidelines for the community economic development area of focus)
 - c. Promoting the use of traditional and Indigenous knowledge in agricultural, land, ocean, and natural resource management practices

- d. Improving food security through sustainable agricultural, aquacultural, and fishing methods, enhanced local food production and consumption, reduction of food waste, and equitable access to high-quality food
- 4. Addressing the causes of climate change and climate disruption and supporting solutions to reduce the emission of greenhouse gases
 - a. Providing access to locally sourced, renewable energy, including solar, methane-capture, and small-scale wind and hydropower systems, as part of holistic interventions to mitigate climate change and disruption
 - b. Providing clean-cooking technologies as part of a holistic approach to reduce or eliminate the burning of biomass and fossil fuels that results in deforestation, degraded land, or increased air pollution
 - c. Supporting the transition to sustainable, energy-efficient transportation modes through holistic urban and regional planning, education, or infrastructure changes
- 5. Strengthening the resilience of ecosystems and communities affected by climate change and climate disruption
 - a. Supporting adaptation and resiliency strategies for ecosystems and communities affected by climate-related events, with an emphasis on vulnerable segments of the population
- 6. Supporting education to promote behaviors that protect the environment
 - a. Supporting environmental education programming in schools that aligns with local government curriculum (adhering to the policy statements and guidelines for the basic education and literacy area of focus)
 - b. Promoting community-based environmental education, environmental awareness and advocacy initiatives, and strategies to facilitate engagement and behavior change to support environmentally sustainable living, environmental protection, and sustainable development
- 7. Advocating for the sustainable consumption of products and the environmentally sound management of byproducts to build a more resource-efficient economy
 - a. Supporting community planning efforts to strengthen circular economies through composting, recycling, upcycling, and repurposing programs (for solid waste management projects, adhering to the policy statements and guidelines for the water, sanitation, and hygiene area of focus)
 - b. Promoting efficient food consumption by reducing food waste by local businesses and households
- 8. Addressing environmental justice issues and environmental public health concerns
 - a. Addressing adverse environmental public health impacts in communities through education, outreach, and advocacy
 - b. Eliminating and reducing exposure to environmental toxins in homes, schools, and communities within vulnerable and marginalized populations

- c. Increasing equitable access to organic, healthy, and nutritious food for vulnerable and marginalized populations

Projects that do not seek to achieve a positive, measurable, and sustainable impact on the environment would not be eligible for global grant funding within the protecting the environment area of focus. A successful global grant project requires a comprehensive and holistic approach to resolving specific issues that have a harmful effect on the environment. The Rotary Foundation considers the following stand-alone activities to be outside the scope of the area of focus and not eligible for global grant funding:

1. Community beautification projects
2. Single-event training or education sessions
3. Single-event river, beach, or habitat clean-ups
4. Tree plantings that are not part of a larger ecological framework and strategy
5. Crematories as a stand-alone equipment and infrastructure purchase or installation without a holistic project design that aims to achieve specific and measurable positive environmental impacts
6. Nature therapy
7. Food distribution programs
8. Outdoor recreational activities
9. Projects that involve only building infrastructure, purchasing equipment, or training in how to use that equipment

Note: This list is not a complete list of ineligible activities. For more information on project design requirements, refer to the Environment Guidelines for Global Grant Funding.

Elements of Successful Humanitarian Projects and Vocational Training Teams

Environment global grants are:

1. Sustainable — Communities can continue to make progress in environmental protection and sustainability after the Rotary clubs or districts complete their work.
2. Measurable — Sponsors need to set targets and identify measurements to track project outcomes.
3. Community-driven — Projects meet the needs identified by the host community.

Elements of Successful Scholarships

Global grants support graduate-level scholarships for professionals interested in pursuing careers related to the environment. The Rotary Foundation considers the following when it evaluates global grant scholarship applications:

1. **The applicant's previous work experience in environment-related fields**

2. **The academic program's alignment with the environment, such as natural resource** management, environmental engineering, environmental health, environmental toxicology, forestry, conservation management, or environmental justice
3. **The applicant's career plans as they relate to the environment**

Individual recognition

Rotary Foundation Sustaining Member

When you give \$100 or more per year to the Annual Fund.

Benefactor

When you include the [Endowment Fund](#) as a beneficiary in your estate plans or when you donate \$1,000 or more to the fund outright. Benefactors receive a certificate and insignia to wear with a Rotary or Paul Harris Fellow pin.

Paul Harris Fellow

When you give \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant. To recognize someone else as a Paul Harris Fellow, you can give that amount in their name. Learn more about [Paul Harris Fellow recognition](#).

Multiple Paul Harris Fellow

When you give additional gifts of \$1,000 or more to the Annual Fund, PolioPlus, or an approved Foundation grant.

Paul Harris Society member

When you elect to contribute \$1,000 or more annually to the Annual Fund, PolioPlus, or an approved Foundation grant. Learn more about the [Paul Harris Society](#).

Bequest Society

When you make a commitment for future gifts of \$10,000 or more to The Rotary Foundation, you'll be invited to join the Bequest Society.

- \$10,000: Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000: Rotary's Promise crystal and named endowed fund, plus all of the above
- \$50,000: Separate named endowed funds directed to two areas of focus or districts, plus all of the above
- \$100,000: Customized Rotary's Promise crystal, plus all of the above

- \$250,000: Posthumous induction into the Arch Klumph Society, plus all of the above
- \$500,000: Special seating and registration benefits at the Rotary International Convention, plus all of the above

Major Donor

When your cumulative donations reach \$10,000. Major Donors can choose to receive a crystal recognition piece and a Major Donor lapel pin or pendant.

NOTE: Name recognition is not automatic and needs to be reported to [RI staff](#).

Recognition items commemorate giving at these levels:

- Level 1: \$10,000 to \$24,999
- Level 2: \$25,000 to \$49,999
- Level 3: \$50,000 to \$99,999
- Level 4: \$100,000 to \$249,999

Arch Klumph Society

When your cumulative donations reach \$250,000. Recognition includes an induction ceremony and your picture and biography in the Arch Klumph Society interactive gallery at the Rotary International headquarters in Evanston, Illinois, USA. You also receive invitations to society events, along with membership pins and crystals that commemorate giving at the following levels. Learn more about the [Arch Klumph Society](#).

- Trustees Circle: \$250,000 to \$499,999
- Chair's Circle: \$500,000 to \$999,999
- Foundation Circle: \$1,000,000 to \$2,499,999
- Platinum Trustees Circle: \$2,500,000 to \$4,999,999
- Platinum Chair's Circle: \$5,000,000 to \$9,999,999
- Platinum Foundation Circle: \$10,000,000 and above

Legacy Society

When you promise a gift of \$1 million or more to the Endowment, you'll be listed in Rotary's annual report and invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special recognition items and all the benefits provided to Bequest Society members.

Club recognition

100% Paul Harris Fellow Club

For clubs in which all dues-paying members are Paul Harris Fellows. This is a one-time recognition.

100% Paul Harris Society Club

For clubs in which every dues-paying member contributes a minimum of \$1,000 to the Annual Fund, PolioPlus, or global grants within a Rotary year

100% Foundation Giving Club

For clubs that achieve an average of \$100 in per capita giving and 100 percent participation, with every dues-paying member contributing at least \$25 to any or all of the following during the Rotary year: Annual Fund, PolioPlus Fund, approved global grants, or [Endowment Fund](#).

100% Rotary's Promise Club

For clubs in which every dues-paying member supports the Endowment. The commitment may be for a future gift to The Rotary Foundation in an estate plan or an outright gift of \$1,000 or more to the Endowment.

Every Rotarian, Every Year Club

For clubs that achieve a minimum Annual Fund contribution of \$100 per capita during the Rotary year, and every dues-paying member must personally contribute at least \$25 to the Annual Fund during the year.

Top Three Per Capita in Annual Fund Giving

For the three clubs in each district that give the most, per capita, to the Annual Fund. Clubs that give at least \$50 per capita are eligible.

Module A-4: Increasing Humanitarian Service By Supporting Our Foundation

Breakout Room Questions

1. How does support for The Rotary Foundation help increase humanitarian service?
2. What are some of the programs of The Rotary Foundation?
3. How does participation in Rotary Foundation programs help attract, engage, and retain members?
4. What are some of the good works accomplished through our Foundation? Refer to the Rotary Areas of Focus in your PETS Workbook.
5. What are some of the types of individual and club recognitions for giving to our Foundation? For example, Sustaining Member, Paul Harris Fellow, Paul Harris Society, etc.
Refer to the Individual and Club Recognitions handout in your PETS Workbook.
6. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
7. What is your **primary takeaway** from The Foundation session?
8. Any other question(s)?

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Lone Star P.E.T.S. 2021

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

THURSDAY, FEBRUARY 25, 2021

MODULE B-5 REACHING OUT THROUGH SERVICE

GOAL

Club Presidents and Presidents-Elect will have the skills necessary to guide club members in planning, implementing, and evaluating effective service projects.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Articulate the value of building a balanced approach to local community and international service projects, based on club membership interests
2. Define key elements of an effective project
3. Identify key club members who have leadership and passion for various projects

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 8: Your Projects
Community Assessment Tools: A Resource For Rotary Projects

CONDUCTING SERVICE PROJECTS



Your committee's role is **to lead your club's projects** to make a difference in the communities you work in. Club projects also provide an opportunity for your club members to network and socialize with each other, which can help strengthen their commitment to Rotary.

For each project, your committee will develop a timeline, conduct a community assessment, and establish criteria for measuring progress, using the resources and tools available to you. Here is one process your club can use for planning and implementing a Rotary service project:

- 1. Assess the situation.**

Successful service projects address real and current concerns within a community and use the assets of that community to make a lasting change. Conduct an assessment to identify a community's assets and needs. The [Community Assessment Tools](#) guide gives you a variety of community assessment methods you can use. You must include community assessment results with applications for a global grant.

- 2. Choose a project.**

The assessment provides criteria for choosing a service project. Some criteria to consider include **community support and involvement, the club's history of service, the resources available to you, the length of the project, and the project's sustainability.**

- 3. Make a plan.**

Set objectives, develop a work plan and a budget, and determine what liability protection is called for. After you choose a project, work with your **club's** board and district staff to discuss funding and other resources that can help you develop detailed plans for your project. Contact your [district international service chair](#) to connect with local experts within the family of Rotary.

- 4. Carry out your project.**

Promote the project, raise funds, and manage project activities.

- 5. Evaluate your project.**

Determine what worked and what didn't. Document your findings and incorporate them into your club's project planning process.

Need help getting started?

- The [Rotary's Areas of Focus](#) guide provides examples of projects in each area.
- The Rotary's Areas of Focus course on the [Learning Center](#) has presentations to help educate members on our different causes.

- [Rotary Showcase](#) features highlights of current projects, which can be helpful as you plan projects.
- There are project strategies and case studies for some of the six areas of focus on My Rotary:
 - [Basic Education and Literacy Project Strategies](#)
 - [Economic and Community Development Project Strategies](#).
- The [Project Lifecycle Resources](#) page provides additional ideas and resources for planning and conducting service projects.

Remember that there are people and groups who can help you plan and implement your projects:

- District international service chairs and service project managers
- Rotarians and their families and friends
- Community organizations
- Rotaract club members
- Rotary alumni
- Interact club members, Rotary Youth Exchange students, and RYLA participants
- Rotary Community Corps members
- Members of other Rotary clubs
- Rotarian Action Groups and Rotary Fellowships

CONTACTING OTHER ROTARY CLUBS

Rotary policy prohibits Rotarians from using any of these resources for commercial purposes:

- The Official Directory
- A club or district directory
- Any other database or list of names compiled in connection with Rotary-related projects or activities.

Rotarians are also prohibited from making these resources available to others for commercial purposes. Please share this policy with members of your club to prevent any abuse of Rotary resources.

In some circumstances, a Rotary club may contact other clubs **about matters that don't** relate to **Rotary's** business and activities, as long as these conditions are met first:

- A Rotary club must ask permission from their district governor before approaching other clubs, and they must state the purpose of the contact to their district governor.
- A Rotary club must request permission from the RI Board before directly asking for financial support from any other Rotary club or any individual Rotarians other than **that club's** own members.

What makes a service project effective?

Effective service projects do more than just offer a quick “fix” to problems. Typically, Rotary’s most effective service projects:

- Respond to real issues
- Improve community members’ lives
- Incorporate the abilities of those who are served
- Recognize the contributions of all participants as important and necessary
- Are based on a realistic assessment of available resources
- Aim for specific goals and objectives with measurable results
- Build effective networks
- Empower people and communities

Project Lifecycle Resources

From planning and supporting your effort to promoting and evaluating its impact, these resources can help ensure success throughout the lifecycle of your project:

Planning & organizing

Well-planned service projects are more likely to have a strong impact and create effective and transparent communication between your community and club. Every community has its own unique assets and concerns. [Learn about Rotary's six causes](#) to help address some of the world's most critical needs.

Leverage your district's local expertise

Many districts maintain networks of local experts (district resource network) with technical and project-planning expertise. Download our [infographic](#) to take the first step to planning sustainable, successful projects and grants. [Ask your district international service chair](#) to help you get in touch with them early in the planning process and how to [connect with resources to improve projects and global grants](#). Your district or regional experts can serve as advisors to help your club:

- Align a project with Rotary's areas of focus
- Obtain assistance with project design/planning and implementation
- Learn about the global grant process
- Conduct a community assessment
- Identify international partners
- Secure funding
- Ensure the sustainability of the project
- Establish measurement and evaluation benchmarks

You can also identify local and international experts from the Rotary family through your district's resource network, [Rotary Action Groups](#), or the [TRF Cadre of Technical Advisors](#). [Learn more](#) about the support each of these groups can offer your clubs. [Read](#) how clubs can leverage member expertise to plan more impactful and sustainable service projects.

Exchange ideas in the online community

Share your ideas and get advice by asking the experts in our [Cadre-led](#) Area of Focus discussion groups and exploring [groups](#) facilitated by members involved in RAGs, RCCs, global grants and more.

Conduct a community assessment

[Work with your community](#) to identify a need, how best to address it, and what resources are available. A [Rotary Community Corps](#) can help you build a relationship with stakeholders.

Set service goals

Use [Rotary Club Central](#) to set and track your project's goals. If you plan to apply for a global grant to

fund your project, consult the [Monitoring and Evaluation Plan Supplement](#) for suggested project measures and sample project monitoring plans.

Create a project plan

A comprehensive project plan will help you manage your resources, anticipate problems, and evaluate your project's success. Form a [club service projects committee](#) to oversee your projects.

Acquiring resources

Take advantage of crowdsourcing, grants, and fundraisers to acquire resources for your next project.

Promote your project

Post your project on [Rotary Showcase](#) to raise awareness for your project within the Rotary Community. Rotary Showcase can tell potential partners the story of your club's service.

Promote your project using social media, club newsletter, website, and other channels.

Use Rotary Grants

The Rotary Foundation has grant funds available to support your projects.

- [Global grants](#) support large international activities with sustainable, measurable outcomes.
- [District grants](#) fund small-scale, short-term activities that address community needs.

Apply through the [grant center](#).

Hold a fundraiser

Get [tips](#) on how to hold a successful fundraiser.

Work with partners

Make your project stronger by involving [Rotaract](#) and [Interact](#) club members, our [partners](#) or [Rotary Action Groups](#), [Rotary Community Corps](#), [Intercountry Committees](#).

Participate in a project fair

Connect with partner through a [project fair](#) in your area.

Implementing your project

Communicate

Keep volunteers, stakeholders, and partners informed and up-to-date. Transparent communication through any medium is an important part project implementation.

Share project news

Use social media channels and your club website to promote your project and to update volunteers, community supporters, and club members on your progress.

Ask questions along the way

The [cadre discussion groups](#) offer advice and guidance on implementation strategies. Ask the experts your questions and share your experiences.

Evaluating & promoting

Once your project is complete, take time to reflect on its impact, its successes, and its challenges. The lessons you learn can help you the next time around and can help others.

Update your service goals

Revisit your service goals in [Rotary Club Central](#) and see how close your estimate matches the actual resources you used. Use this information to plan even better projects in the future.

Promote your project

[Rotary Showcase](#), your club and district service resume, is the best way to inspire others and celebrate your success with the Rotary community and the world. Remember to add photos and share the page on social media.

Find more ways to [promote your club's project](#).

Submit the final report

If you received a global grant, submit the final report through the [Grant Center](#). If you received district grant funding, send your final report to your district leadership.

More information

- [Sign up](#) for Rotary Service and Giving Grants newsletters
- [Read](#) how working with local experts early in the planning process can improve the quality of your projects and global grants

Related documents

- [Project Planning Resources](#)
- [Community Assessment Tools](#)
- [Take the First Step to Planning Impactful Projects & Grants](#)
- [Connect With Resources to Improve Projects](#)

- [Guide to Global Grants](#)
 - [Lead Your Club: Service Projects Committee](#)
 - [Donations-in-kind Best Practices Guide](#)
 - [Rotary's Areas of Focus guide](#)
 - [How to add a project to Rotary Showcase](#)
 - [How to join a discussion group](#)
-

SUSTAINABILITY

For Rotary, sustainability means providing long-term solutions to community problems that community members themselves can support after the grant funding ends.



Start with the community

Identify a need and develop a solution that builds on community strengths and aligns with local values and culture.



Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



Provide training

A project's success depends on people.



Buy local

Purchase equipment and technology from local sources.



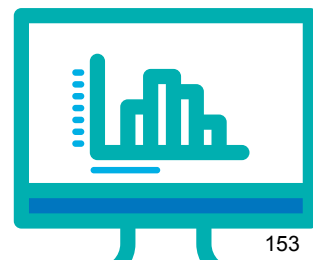
Find local funding

Get local funding through governments, hospitals, companies, and other organizations.



Measure your success

Develop clear and measurable project outcomes and determine how you will collect your data.



RECOMMENDED STAKEHOLDERS FOR ROTARY'S AREAS OF FOCUS

Peace and conflict prevention/ resolution

- Victims of violence, refugees, or internally displaced people
- Perpetrators of violence
- Factions that are at odds with each other
- Civil society organizations
- Schools and educational institutions
- Local government and law enforcement authorities

When you're assessing sensitive populations such as trauma victims or communities in conflict, it is crucial that you work directly with individuals or organizations that understand the dynamics of the situation. These collaborations will ensure that the assessments are conducted appropriately, with the best possible outcome.

Water and sanitation

- Community leaders, particularly women
- Ministries of water, sanitation, or environment
- Ministries of education, along with students, teachers, headmasters, and parent associates (WASH in Schools)
- Ministries of health (WASH in health care facilities)
- District/local government representatives
- Private utility companies
- Service providers (hand pump mechanics, community outreach workers, etc.)

- Farmers (irrigation)
- WASH advocacy associations
- WASH organizations working in the area

Basic education and literacy

- Teachers
- Parents
- Students
- Youth who do not attend school
- School administrators
- School management committees
- Ministries of education
- Adult education institutes
- Vocational training institutes
- Community and technical colleges
- Libraries and librarians

Disease prevention and treatment & maternal and child health

- Individual health care recipients:
 - Pregnant women
 - At-risk children
 - Adults at risk for noncommunicable and communicable diseases
 - At-risk aging population
- Community health centers and hospitals
- Mobile outreach systems
- Community health care workers
- Skilled birth attendants
- Health care professionals (nurses, doctors, midwives, technicians, specialists, etc.)

- Access and continuum of care structures:
 - Prevention, primary care, and referral systems
 - Transportation providers
 - Hospitals
 - Follow-up and rehabilitation services
 - Chronic care support and palliative/hospice care systems

Economic and community development

- Local government authorities
- Women's groups
- Government extension services
- Job research centers
- Entrepreneurs
- Ministries of trade, agriculture, social services, women's empowerment, and vocational services
- Farmers
- Unemployed youth and adults
- Business owners
- Banks
- Cooperatives (agricultural, savings and loan, etc.)
- Microfinance institutions
- Vocational training institutions
- Community colleges
- Secondary schools
- Universities
- Adult education organizations

Module B-5: Reaching Out Through Service

Breakout Room Questions

1. What is the value of local service projects?
What is the value of international service projects?
What is the correct percentage mix between the two?
(There is no right answer)
How would you decide the right mix for your club?
2. Refer to What makes a service project effective? handout in your PETS Workbook.
What elements make up an effective project?
Which element is most important?
Which element(s) in your club's projects needs your leadership?
3. What is a key service project in your club?
Who would make a good service chair?
How do you discover who has leadership and passion for service projects?
4. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
5. What is your **primary takeaway** from the Service session?
6. Any other question(s)?

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Lone Star P.E.T.S. 2021

PRESIDENTS-ELECT / PRESIDENTS-NOMINEE WORKBOOK

FRIDAY, FEBRUARY 26, 2021

MODULE B-6

FUNDRAISING AND PUBLIC IMAGE STRATEGIES THAT WORK

GOAL

Club Presidents and Presidents-Elect will possess knowledge and insight about how to lead their respective clubs in effective fundraising and public image strategies.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Identify fundraising purposes and public image practices
2. Identify the role of Club President in club fundraising and public image development
3. Evaluate fundraising and public image options in light of perceived club culture

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 2: Leading Rotarians
Rotary Brand Center

PLANNING FUNDRAISING EVENTS



Work with your club committees on fundraising efforts. A successful fundraising event **can support projects that make a real difference in people's lives. If your club chooses to organize a fundraiser, include the following steps:**

1. **Determine what you need.** Set a target amount as your goal and identify the type of event that will realistically yield that amount.
2. **Establish a budget.** Find out what is available in your club budget to hold an event and determine what your expenses and anticipated revenues will be.
3. **Identify the resources required to meet your fundraising goals.** Determine how many people are needed to plan and carry out the fundraiser. Use [Rotary Ideas](#) to help you plan your event and meet your fundraising goals.
4. **Figure out logistics.** Choose an appropriate date and venue for the event.
5. **Minimize risks.** Evaluate whether the event activities might lead to potential losses to the club, and determine how those losses can be avoided.
6. **Organize volunteers.** Determine roles and tasks for volunteers, and involve community members. Set up a fundraising organizing committee.
7. **Publicize the event.** Work with the club public image committee to identify target audiences for your event in the club and the community, and plan how you will reach them. Notify the media about your event if appropriate. You will find a variety of promotional resources in the [Brand Center](#).
8. **Hold the fundraiser.** Encourage volunteers to monitor the event's progress, noting successes and challenges to be discussed during evaluation.
9. **Manage funds appropriately.** Establish a tracking procedure before collecting any funds, and deposit funds in an account opened specifically for the event. Report how the funds are used to the club and donors.
10. **Recognize volunteers, contributors, and sponsors.** Send personalized thank-you notes, photos, and certificates if appropriate.
11. **Evaluate the effort.** Make note of what worked and what **didn't** so what you learned can be applied to future fundraisers.
12. **Ensure success for future fundraising efforts.** Discuss any outstanding concerns or issues with the incoming treasurer and with new members of the fundraising organizing committee.

You will find more event ideas and promotional resources in the [Event Planning Guide](#) in the Rotary Brand Center.

What Is Your Club Known For?

One of my most favorite Rotary activities is to visit clubs that are new to me. I frequently walk in, introduce myself to a member, and ask them to tell me about one of their club's projects.

All too frequently, what follows is a description of the club's Auction or Golf Tourney or Pizza Bowl — a fundraiser, but not a service project — which is, after all, the reason Rotary exists.

If club members, when asked to share something about their club, immediately focus on how the club raises money and ignore the service aspects of what we do, how is Rotary to share the good word of our successes? How are we to engage potential members if we stress the *how* of what we do, but not the *why* or the *what*?

Rotary leadership training programs often describe the importance of the "elevator speech," the opportunity to condense the essence of our Rotary experience into a few sound bites when we have an opportunity to explain Rotary to a stranger.

As leaders in this movement, it is critical that we spread the word to club members that, when given the opportunity to talk about Rotary, they should be sure to include how their local club supports a scholarship fund or food pantry or home heating oil fund. How Rotary is ridding the world of a crippling disease. How Rotary is making a difference on the ground through our humanitarian grants.

And only when the follow-up question comes, "how do Rotary members find the money to do all this?" should we talk about the Wine Auction or the Polar Bear Plunge.

—Marty Helman

Public Image



Signature Projects Deliver Significant Benefits

By Rotary Zone Coordinator Gayle Knepper

Many clubs are looking for ways to become involved in a new area of service — in other words, a new project — to meet changing needs of their communities, re-motivate members and stimulate involvement from non-Rotarians. If this describes your club, now may be the time to consider a signature project.

A signature project is a significant service initiative, one for which a club is clearly recognized in the community and that differentiates it from other organizations.

Small projects, while worthwhile, are difficult to leverage into lasting community impact and awareness. A major project, on the other hand, creates a "signature" for the club, one which establishes public recognition that Rotary is a dynamic, action-oriented service organization and one in which others want to get involved.

Signature projects can range from the purchase and staffing of a Rotary bookmobile traveling throughout the city to an annual regional marathon that raises funds to support homeless teens.

Attributes of a signature project include substantial size, scope and duration: it continues or repeats regularly for a number of years. It integrates most functional areas of a club, all or nearly of its members (many clubs have a goal of 100% member involvement) and engages outside partners and community members. It usually addresses a significant and recognized need.

The benefits? In addition to providing service in response to an important community concern, it increases visibility of the club, attracts new funding sources, increases hands-on service by members, motivates non-Rotarians to become engaged and often provides an opportunity for a Foundation grant. All accomplished by a single project.

A signature project requires careful advance planning due to its size and impact, but the results of a signature project for the community and the club are well worth the commitment.

One remarkable example of a significant signature project in Zone 24 is "Rotary Park," developed by the Novosibirsk Initiative club (District 2225). Although still under construction, the nearly \$500,000 project to serve handicapped children is already delivering benefits to the community and to Rotary, and supported an increase in club size of nearly 90% since 2012.

[Read the full story.](#)

If your club is considering a signature project, contact the Rotary Coordinator in your region to discuss steps to get started or check the Signature Project resources page at www.GreatIdeasToShare.com.



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ASSESS YOUR RESOURCES

Once you've chosen the type of event you want to host, assess the resources available to carry it out. Consider time, money, materials, and people. Here's an example of a timeline and checklist for planning an event that's open to the community.

TIME FRAME	TASKS
24-18 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Identify the event's goals <input type="checkbox"/> Create an event plan that covers topic, audience, speakers, sponsors, promotional plan, venue, risk management <input type="checkbox"/> Build a team and assign roles <input type="checkbox"/> Contract with the event venue <input type="checkbox"/> Develop a budget <input type="checkbox"/> Review possible contingencies (e.g., for outdoor events, develop a plan in case of inclement weather) <input type="checkbox"/> Review insurance coverage for the event and contact your insurance provider <input type="checkbox"/> Get tax and legal advice; hosting exhibits, sponsoring events, or accepting sponsorships may have tax and legal consequences for your club <input type="checkbox"/> Develop a request for proposal to get vendor bids
18-12 weeks before	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm speakers and rehearsal times <input type="checkbox"/> Find sponsors <input type="checkbox"/> Find exhibitors <input type="checkbox"/> Get vendor bids (for meeting and event services, graphics, printing, audiovisuals, catering, music, photography, security, etc.) <input type="checkbox"/> Analyze the bids and select service providers <input type="checkbox"/> Negotiate contracts, including payment terms and service delivery <input type="checkbox"/> Set deposit due dates <input type="checkbox"/> Develop a registration system; include a question about dietary restrictions if applicable <input type="checkbox"/> Obtain public performance licensing rights for music, etc. <input type="checkbox"/> Confirm entertainment and any rehearsal or sound check times

TIME FRAME	TASKS
18-12 weeks before (continued)	<input type="checkbox"/> Confirm sponsors and exhibitors <input type="checkbox"/> Decide how and where you will promote your event <input type="checkbox"/> Inventory marketing materials: decide if any new ones are needed <input type="checkbox"/> Design promotional items: <ul style="list-style-type: none"> - Event sign-up page - Event posters - Fliers - Social media graphics - Email campaign - Videos - Other advertising materials - Materials for a Rotary booth at the event (banners, branded tablecloth, etc.) - Signs for the event space (photos, backdrop, banners, etc.)
12-8 weeks before	<input type="checkbox"/> Send invitations <input type="checkbox"/> Deliver invitations and promotional materials to speakers and partners to distribute to their networks <input type="checkbox"/> Add information about the event on your club's website; explore other sites for promotion <input type="checkbox"/> Deliver promotional materials to others in your network <input type="checkbox"/> Draft a floor plan (include seating, registration area, attendee flow, exhibits, and food and beverage areas) <input type="checkbox"/> Draft a detailed schedule for the event, including setup, rehearsals, breaks, and run of show <input type="checkbox"/> Define volunteer assignments; note any special skills required
8-6 weeks before	<input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> - Registration reminder - Latest program developments - Logistic information - Share with a friend <input type="checkbox"/> Start a phone campaign to key audience targets <input type="checkbox"/> Continue to distribute promotional materials <input type="checkbox"/> Recruit volunteers for specific assignments

TIME FRAME	TASKS
6-4 weeks before	<input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> - Registration reminder - Latest program developments - Logistic information - Share with a friend <input type="checkbox"/> Get speakers' presentations <input type="checkbox"/> Develop the presentation on Rotary and your club <input type="checkbox"/> Continue promoting the event <input type="checkbox"/> Select menus, if applicable <input type="checkbox"/> Train volunteers <input type="checkbox"/> Refine the floor plan <input type="checkbox"/> Refine the detailed schedule <input type="checkbox"/> Make a delivery and storage plan for event materials (e.g., printed materials, sponsor items, badges, displays, etc.) <input type="checkbox"/> Open event registration
2 weeks before	<input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> - Registration reminder - Latest program developments - Logistic information - Share with a friend <input type="checkbox"/> Finalize floor plan <input type="checkbox"/> Finalize the detailed schedule <input type="checkbox"/> Develop a detailed list of desired photos for the photographer <input type="checkbox"/> Reconfirm all speakers, vendors, and logistics <input type="checkbox"/> Give final floor plan and the detailed schedule to the event venue and key stakeholders



TIME FRAME	TASKS
1 week before	<ul style="list-style-type: none"><input type="checkbox"/> Send email reminder to registered attendees<input type="checkbox"/> Rehearse the program with speakers<input type="checkbox"/> Determine last-minute vendor needs<input type="checkbox"/> Prepare goody bags, handouts, etc.<input type="checkbox"/> Contact media about the event<input type="checkbox"/> Provide guarantees to the event venue<input type="checkbox"/> Hold final meeting of planning committee with vendors to review all arrangements and timing
2 days before	<ul style="list-style-type: none"><input type="checkbox"/> Send final email reminder to presenters and attendees<input type="checkbox"/> Continue to follow up with media contacts<input type="checkbox"/> Hold a final meeting with venue personnel to review the detailed schedule<input type="checkbox"/> Deliver all materials to the venue
Event day	<ul style="list-style-type: none"><input type="checkbox"/> Set up signs, tables, program materials, etc.<input type="checkbox"/> Do a final review and walk-through of the event site<input type="checkbox"/> Perform audiovisual checks<input type="checkbox"/> Greet vendors and speakers<input type="checkbox"/> Assign someone to greet media representatives and introduce them to speakers and partners<input type="checkbox"/> Identify key people for photographer<input type="checkbox"/> Collect contact information from walk-in attendees for follow-up

KEY POINTS FOR TALKING ABOUT ROTARY



Here are messages to help you develop key points before media interviews and speeches to external audiences.

INTRODUCTORY PRIMARY MESSAGE

- Every day, in our communities and around the world, our neighbors face tough challenges — conflict, disease, and lack of clean water, health care, education, and economic opportunity.

SUPPORTING MESSAGE

- Rotarians have a vision of what's possible for their neighbors. They mobilize other leaders and experts to take action and see it through.

ABOUT ROTARY — PRIMARY MESSAGES

- Rotarians are people of action, driven by a desire to create opportunities, strengthen communities, and find solutions to the tough challenges that affect people around the world.
- Rotary is a community of 1.2 million men and women from all continents, cultures, professions, and experiences who connect through our local clubs.
- Rotary clubs tackle projects of every scale and inspire fellow Rotarians, friends, neighbors, and partners to share their vision, exchange ideas for lasting solutions, and take action to bring those ideas to life.

SUPPORTING MESSAGES

- Together with our partners, neighbors, and friends, we're:
 - Promoting peace — encouraging dialogue to foster understanding within and across cultures
 - Fighting disease — educating and equipping communities to stop the spread of life-threatening or preventable diseases
 - Providing clean water — building local solutions to bring clean water and sanitation services to more people every day
 - Saving mothers and children — expanding access to quality care so mothers and children can live and grow stronger
 - Supporting education — expanding access to education and empowering educators to inspire more children and adults to learn
 - Growing local economies — creating opportunities for individuals and communities to thrive financially and socially
 - Eradicating polio — uniting the world to end polio, once and for all

- Rotary is a trusted partner and resource. With members and projects in almost every part of the globe, there's no limit to the good we can do.

Rotary's top philanthropic goal is to eradicate polio worldwide.

- Rotary and its partners are close to eradicating polio, having achieved a 99.9 percent reduction in cases since 1988.
- Rotary's chief role is fundraising, advocacy, and mobilizing volunteers.
- Rotary's contributions to the global polio eradication effort will exceed more than \$2.2 billion and countless volunteer hours to protect more than two billion children in 122 countries from polio.
- Rotary is working to raise an additional \$50 million per year through 2020 for polio eradication, to be matched 2-to-1 by the Bill & Melinda Gates Foundation.

Rotary builds peace and international understanding not only through education and humanitarian service but also by developing young leaders.

- More than 900 graduates of the Rotary Peace Centers master's degree program are in key decision-making positions in governments, corporations, and organizations around the world.
- Rotary's humanitarian projects help prevent the underlying causes of conflict, such as poverty, illiteracy, and lack of clean water.
- Rotary's Youth Exchange program fosters international goodwill by enabling over 8,000 high school students to live and study abroad each year in 115 countries.
- Rotary's Interact and Rotaract programs develop young leaders by promoting volunteer service, leadership, and professional growth.

STRATEGIES FOR PROMOTING YOUR CLUB



By spreading the word about **Rotary's impact on the world**, you will help your club:

- Raise awareness of **its activities and Rotary's work**
- Attract and engage members
- Increase contributions to The Rotary Foundation
- Garner partnerships, volunteers, and support for local projects

Your committee's main responsibility is to create awareness in your community of club **projects and activities**. **This will shape your club's image**. Read the tips below to get started.

PUBLIC RELATIONS

- **Invite journalists from local media to your club's special events.** Projects that attract media attention often:
 - Meet a community need or coincide with a larger news trend
 - Involve an international effort supported by your club or a club member
 - Involve local youth or a prominent community member
 - Highlight Rotary program participants or alumni and their experiences in another culture
 - Include activities that can be shown in compelling photos or video
 - Incorporate innovative or unique components

MEDIA RELATIONS

- Cultivate relationships with local journalists who cover topics related to your club's projects. Find out what types of stories they prefer, how they want to be contacted, the amount of lead time they need, and the information they would like to receive (e.g., news releases, background materials, photos, videos, interviews).
- Approach targeted media with timely stories **about your club's work to** address a community issue. Send individual emails to journalists that include:
 - Data that demonstrate the matter's significance and the positive impact of your project
 - Personal stories that underscore the impact of your work, such as a beneficiary or club member with a close connection to the issue

- Interview opportunities with project leaders, partners, or beneficiaries
 - Compelling visuals to help tell your story, such as club members actively engaging with community residents or doing hands-on volunteer work
 - A concise explanation of the story in the subject line
 - A news release (if you choose to send one) pasted into the body of your email rather than as an attachment
- Share media coverage on your club social media channels.
- Collaborate with partner organizations on media outreach.

MARKETING

- Look for opportunities to place [People of Action ads](#) in your local newspaper and on its website. Have your **community's** radio station air an ad. Ask media outlets if they offer no-cost placements.
- Ask local stores if you can post print ads and posters or leave brochures.
- Follow up with speakers, grant recipients, past sponsors and donors — anyone connected to your club — to let them know how to get involved in your projects and events.
- Provide club members with materials to promote Rotary and your club. You can use the customizable template in the [Brand Center](#) to create a brochure for prospective members.
- Encourage members to wear their Rotary lapel pins and talk about our organization.

SOCIAL MEDIA

- Post content that is visually appealing and includes compelling statements **about your club's activities**.
- Share personal stories and news about club projects and events using the hashtag #PeopleofAction.
- Include quotes, photos, and videos from guest speakers (with their permission) and link to their social media pages.
- Keep your social media pages active by sharing content from Rotary **International's** channels or those of trusted partners.
- Encourage members **to share your club's posts** through their own social media accounts.
- Make sure your pages include up-to-date information and feature messages intended for the general public.

EVENTS

- Encourage your club to host one signature event each year to foster an ongoing awareness within the community.
- Sponsor special events such as marathons, recycling efforts, and fundraisers for a Rotary project or program.
- Create exhibits for museums, city halls, or libraries.
- Plan and promote networking opportunities and other activities that exemplify the benefits of joining Rotary.

CLUB WEBSITE

- Use images and videos that feature club members working together, having fun, and making a positive change within the community.
- Dedicate a section of your **club's website to the public and encourage** local organizations to link to it.
- Make it easy for community residents to support your club by including clear calls to action, including ways to donate, volunteer, or become a member.

Talk with your committee about other ways to promote your club, and work with club leaders to determine who will be responsible for its newsletter, website, social media accounts, marketing materials, and other communications.



ROTARY DAYS PHOTOS

During and after your event, post photos and videos with the hashtag #RotaryDay to social media. We'll collect photos of Rotary Day events around the world and show them at the 2019 Rotary International Convention in Hamburg, Germany. Some may also appear in Rotary media throughout the year.

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

Rotary's Vision Statement



ROTARY
DAYS
2018-19



This year,

I urge you to *Be the Inspiration* by hosting Rotary Days. These local, community-oriented events highlight the transformational activities that our Rotary, Rotaract, and Interact clubs undertake every day. You can hold a Rotary Day anytime. It will offer you the chance to have an impact in your community, build long-term partnerships, increase interest in membership, and improve Rotary's image. Imagine the collective impact we can have if all 35,000 Rotary, 10,000 Rotaract, and 22,000 Interact clubs engage their neighbors, friends, young people, and organizations. Will you do your part by encouraging clubs and communities to unite, inspiring transformational action, and creating lasting change?

Be bold, be innovative, and show the magic of Rotary.

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— Barry Rassin, President, Rotary International

HOSTING A ROTARY DAY

Any club, big or small, Rotary or Rotaract or Interact, can inspire its community by hosting a Rotary Day. Neighboring Rotary and Rotaract clubs might combine their ideas, talent, and resources to co-host an event. Even entire districts can come together to host one big Rotary Day.

Rotary Days underscore our warm and cohesive community, show others our inspirational work, introduce Rotary to the larger community, and motivate action. They can take any form, as long as they are fun and engaging, involve young people, and are open to all. Clubs are encouraged to add innovative components to their public events.

TIPS FOR ROTARY DAY PLANNERS



BE THE INSPIRATION

Consider partnering with:

- » Nearby Interact, Rotaract, and Rotary clubs
- » Local Rotary Community Corps
- » Young professionals groups
- » Community centers
- » Other service organizations
- » Civic society leaders
- » Local businesses



- » Consider including a hands-on service project as part of the event to let visitors see for themselves how Rotary benefits the community.
- » Feature guests that appeal to a non-Rotary audience. Consider young leaders, inspirational speakers, celebrities, musicians, or other public figures.
- » If the event will offer food, keep it simple — for example, a self-service buffet rather than a formal, sit-down meal.
- » Advocate on local issues related to Rotary's areas of focus by calling attention to challenges that affect people in your area.
- » If you charge admission, keep prices low. Ask local businesses to sponsor your event.
- » Welcome families and make the event enjoyable for them.
- » Present Rotary as an appealing opportunity for potential members to make new friends, exchange ideas, and take action to improve their community and the world. Avoid using Rotary jargon or referring to club traditions.
- » Highlight the work of local Rotarians, Rotaractors, Interactors, Rotary Community Corps members, and other community members who do extraordinary humanitarian work.
- » Recognize non-Rotary community members who demonstrate Rotary's service ideals.
- » Sponsor an event with a partner organization to show that, by working together, we make a deeper and more lasting impact on communities.
- » Ask local news media to cover the event.
- » Collect participants' contact information, and invite them to future club events.



Rotary Talking Points

- #1 Service Organization on THE PLANET!
- Instrumental in the CHARTER OF THE UNITED NATIONS.
- We are "this close" to eradicating POLIO FROM THE WORLD...
 - *In addition, the network developed has been used to stop the spread of EBOLA, HIV, ZIKA and now will be used to help combat COVID-19.*
- Center of Service in each community AROUND THE GLOBE.
 - 1.2 Million members in over 200 countries!
- Relationships that GET THINGS DONE... from the ground up!
- Brings together people from all backgrounds, religions, & nationalities as a collective whole to Serve & Transform the world.
- In person & virtual meetings allow fellow innovators to connect and do the work of the community and hold each other accountable within the foundation of the 4-way test.
- Charity Navigator has ranked The Rotary Foundation with a 4-star for 13 years on a row.
- The Rotary Foundation's mission is to advance world understanding, goodwill & peace!





New Year Checklist



Website Audit

- Update your Club's Logo & RI Theme
- Add/Update your Weekly Speakers
- Add/Update your Club's Events
- Add fresh content to the Home Page Weekly



Rotary Opens Opportunities
2020-2021



SERVE TO CHANGE LIVES
2021-2022

Social Media

- Update your Profile Picture & Cover Photo
 - New Club (Master Branded) Logo & New RI Theme
- Check your ABOUT US page for accuracy
- Know your ADMINS and have multiple members assigned
- MAKE SURE you are a public page and not a closed group
- Add a new post about an upcoming meeting/speaker/event
- Take 5 mins in your next meeting and ask your members to go to the page and "like" it.
- Help your members understand the importance of **INTERACTING** with your Club's Content.
- Commit to posting weekly content about your club.
- Use you TAGS (@people/pages/partners)
- Use Hashtags: #PeopleOfAction #ServiceAboveSelf #CenterOfService

Club Master Brand



LIKE
SHARE
COMMENT
CHECK-IN

Printed & Other Considerations

- Brochure
- Leave Behind Flyer / Rack Card
- Business Cards
- Email Signatures
- Ensure all members have an updated email in MyRotary & Club Central

Watch for Public Image
Training Opportunities!!



Module B-6: Fundraising and Public Image Strategies That Work

Breakout Room Questions

1. What are the current fundraising purposes and public image practices in your club?
Which fundraisers have raised the most money for the work of Rotary within your community?
Which public image practices have done the most to promote the work of Rotary within your community?
List three keys to success.
2. Refer to fundraising and public image excerpts in your PETS Workbook.
As Club President, how do you plan to engage club members to create a successful new fundraiser which will both raise funds and enhance the public image of your club?
(Not planning the project, but planning the leadership actions / communications to engage members for achieving a successful fundraising / public image project)
Share the key steps.
3. Have participants turn to p. 31 in LYC to the fundraising section.
What is the common theme of these financial best practices?
Refer to Signature Projects article in your PETS Workbook.
Which of your clubs have a signature project?
What is your signature project?
What makes a fundraiser right for your club? (no right answer)
How does a signature project and its fundraising event foster an ongoing awareness of the impact of Rotary within your community?
4. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
5. What is your **primary takeaway** from the Fundraising / Public Image session?
6. Any other question(s)?

Notes

This image shows a full page of blank, lined paper. It features approximately 28 horizontal blue lines spaced evenly across the page, typical of standard notebook paper. The lines are thin and light blue, set against a plain white background. There are no margins, text, or other markings on the page.

Lone Star P.E.T.S. 2021

PRESIDENTS-ELECT /PRESIDENTS-NOMINEE WORKBOOK

SATURDAY, FEBRUARY 27, 2021

MODULE C-7

IDENTIFYING AND LEADING CHANGE FOR PROGRESS SAKE

GOAL

Club Presidents and Presidents-Elect will have insight about assessing and leading needed change within their respective clubs in relation to Vibrant Club culture.

OBJECTIVES

At the end of the session, Presidents-Elect/Presidents-Nominee will be able to:

1. Identify attributes of a vibrant Rotary club
2. Recognize the Club President's role in leading changes to be a vibrant club
3. Articulate insights about their club culture, diversity, and change

REFERENCE MATERIALS

Lead Your Club: President -- Chapter 1: Planning Your Year

Lead Your Club: President -- Chapter 2: Leading Rotarians

Membership Assessment Tools

Club flexibility FAQ

Many of the traditional rules and requirements that Rotary clubs have had historically, such as weekly meetings, attendance requirements, morning or lunch meetings, traditional classifications, and high costs, have limited who is able or willing to join. When we join together different perspectives and backgrounds, professions and areas of expertise, talents and resources, we can see challenges in new ways and identify creative solutions.

Any Rotary club wishing to try a new approach can do so by amending its bylaws as permitted by the [Standard Rotary Club Constitution](#). But clubs can also continue to follow their current requirements for meetings, attendance, structure, and categories of membership. Have a conversation with your club members to determine whether flexible options can help to address your club's membership needs.

Meeting format

^ In what ways are clubs changing their meeting format?

Clubs are demonstrating innovation and flexibility by replacing the traditional speaker and meal meeting format with a variety of new formats. Some clubs are rotating where they meet by holding gatherings in a member's home, a local restaurant, or other "offsite" locations such as a local business. Some clubs are meeting virtually or allowing some of their members to call into the in-person meeting. Many clubs are using meetings to plan and conduct their service projects and fundraisers, and having social events to get to know other members better. Consider surveying your members to see what new formats they would be interested in.

^ What are the advantages of changing the meeting format?

Changing the meeting format not only gives members a variety of club experiences, but also keeps them engaged and active in the club. It can also be more appealing to guests to have hands-on, fun, productive meetings that connect with Rotary's values and mission. This form of flexibility also makes it easier for some members to attend meetings virtually when they would not have been able to attend in person. We recommend asking current and prospective members what they hope for in a club meeting experience.

Meeting frequency and attendance

^ How frequently should clubs meet?

Clubs should offer opportunities to meet twice per month at minimum. Those meetings could be traditional meetings, social outings, service projects, etc. Clubs that wish to meet more often can

do so.

^ Are clubs allowed to remove attendance requirements?

Yes. Clubs are encouraged to relax attendance expectations or not have them at all. Our research shows that rigid rules and policies are a barrier to attracting new members and engaging current ones. Further, it excludes younger professionals who have developing careers and young families. Attending meetings is an opportunity, not an obligation.

^ Does our club secretary still need to send monthly attendance reports to the district governor?

Rotary International does not collect attendance reports, which were originally thought of as a way to gauge how engaged members are and how healthy the club is. Some districts continue to follow this method. However, we can measure club health in other ways – for example, by how many members are involved in a project, club leadership role, or by how many beneficiaries have benefitted from your club's service. Ask your district governor what is preferred, and whether a report is needed or whether the information can be captured and shared using Rotary Club Central.

Membership types

^ What membership types exist?

There can be as many types of membership as are created by clubs. Some popular examples are corporate, family, or younger professional membership. However, a club is free to design different membership types that attract diverse members, as long as it's documented how they differ from traditional membership in their club bylaws. The Rotary International database does not track membership types – only whether a member is active or honorary.

^ What's the difference between active and honorary members?

Rotary International defines active members as those who meet the requirements for membership, pay RI dues, are eligible to vote on club and district matters, are eligible to hold a club officer position and count in the club's membership numbers in Rotary's database. Honorary membership is used to recognize people who have distinguished themselves by meritorious service and embody Rotary ideals, or those considered friends of Rotary for their support of Rotary's causes. They are exempt from paying RI dues, have no vote in Rotary matters, are not eligible to hold any club office, and are not included in a club's membership numbers in Rotary's

database. Active members are called Rotarians, while honorary members are called honorary Rotarians.

Honorary membership should not be confused with Rotarians whose excused absence is approved by a club's board. In order to count in a club's membership numbers in Rotary's database, one must be reported as an active, RI-dues paying member. An active member can be an honorary member of another club, but cannot be an active member of another club.

^ **How do corporate memberships work?**

Your club is free to offer alternative membership types of any kind, as long as new members are counted as individuals — corporate members in this case — rather than the corporations that sponsor their membership. If the members pay RI dues, they will be included in your club's official membership count and receive all the benefits that other active, dues-paying members enjoy.

Your club can have different policies for these members' other financial obligations (club and district dues, meal costs, etc.), attendance requirements, or service expectations, as long as these policies are reflected in the club bylaws. Learn more in our [Guide to Corporate Membership](#).

^ **How do family memberships work?**

Family membership – also called spouse or partner memberships – are similar to corporate membership, in that there is often a primary member and one or more alternate members. Often times, the alternate members are young adult children of the primary member or a partner or spouse. Clubs that offer this type of membership typically offer a reduced rate for the alternate member(s) as an incentive to join. The alternate members can attend in the primary member's place or come along with their family member Rotarian. Alternate members may be active, RI-dues paying members or not, depending on how the club chooses to structure this membership type.

^ **How do associate memberships work?**

Your club can define associate membership as it wishes. Some clubs use associate membership as a trial period to engage prospective members. If the associate members see value in the experience, they can join the club. In such cases, the club would report them as active members once they've joined, and the members would then receive all the benefits that other active, dues-paying members enjoy and would be included in the club's membership count.

^ **How do younger professional memberships work?**

Some clubs have designed a membership type for younger professionals with a more affordable dues structure, and more flexible expectations for participating. Clubs that create this type of

membership recognize that younger members can play an integral role in the future of their club, but may not have the financial resources or available time to attend weekly meetings at this point in their careers.

^ **Are Rotaractors now also Rotarians?**

No. Members of Rotary clubs are Rotarians and members of Rotaract clubs remain Rotaractors. The enactment that passed at the 2019 Council on Legislation (19-72) will not change the separate identity of Rotaractors. It simply expands the membership of Rotary International to include both Rotary and Rotaract clubs. For more information, see [Frequently asked questions about 2019 Council on Legislation changes to Rotaract](#).

^ **If I'm a Rotaract member and a Rotary member, do I have to pay dues to both clubs?**

Yes. You would pay any required club or district dues for both clubs, and Rotary member dues to Rotary International. However, your club has the flexibility to create different membership types for Rotaract members and younger professionals. This could include reduced club or district dues for members who belong to both Rotaract and Rotary, as long as the dues to RI are paid.

Also, while there are many benefits that come with dual membership, it should be noted that when Rotaractors join Rotary, they become ineligible for Global Grant scholarship funds, Rotary Peace Fellowships, and Rotaract Convention registration rates.

Club models

^ **What Rotary club models are there?**

Club models simply refers to the way a club chooses to operate. The beauty of flexibility is that each club is free to define its own internal way of life within the framework set by the constitutional documents. Some trends that have emerged are included in [this document](#).

^ **How does a satellite club work?**

Satellite clubs are branch clubs of a sponsor club. The satellite club members are Rotarians and considered members of the sponsor club. Only eight members and the support of a sponsor club are needed to start a satellite club. They often offer a different club environment or meeting time and location from their sponsor club. Like a Rotary club, satellite clubs hold regular meetings, have bylaws and a board, and get involved in community service projects. The sponsor club provides advice and support. In some cases, satellite clubs may grow and apply to become a separate Rotary club. Satellite club members are Rotarians. Officially, they are members of the

sponsor club. For more information, see the [Guide to Satellite Clubs](#) and the [Satellite Club Frequently Asked Questions](#).

^ **How could my club benefit from creating a satellite club?**

Starting a satellite club offers the additional benefits of expanding project possibilities, visibility, and the impact of Rotary in your community. Satellite clubs can also attract members who want a different or more affordable club experience or bring Rotary to communities that might not be able to support a standalone club, and serve as transitional Rotary clubs.

^ **Are satellite club members equal to Rotary club members?**

Yes. Satellite clubs are not substandard Rotary clubs. Their members are members of their sponsor club, and therefore, Rotarians. They have club leaders and committees, conduct service projects, and meet regularly, just like traditional Rotary clubs. Learn more in the [Guide to Satellite Clubs](#) and the [Satellite Club Frequently Asked Questions](#).

^ **Now that Rotary no longer distinguishes between e-clubs and other clubs, are clubs that meet primarily online still called e-clubs?**

It is up to the club. Rotary no longer distinguishes between clubs that hold face-to-face meetings and clubs that meet online. That's because all clubs now have the option of meeting in person, online (using applications such as Skype, Zoom, or FaceTime), or a combination of both. If they choose, clubs that meet exclusively or primarily online may keep that word in their name and continue to brand themselves as an e-club to emphasize their preferred meeting format.

^ **Are current Rotaract and Interact e-clubs still considered e-clubs?**

The Rotaract and Interact standard club constitutions and bylaws already permit these clubs to meet in person, online, or a combination of both, with the approval of their sponsor Rotary club or clubs. Rotaract and Interact clubs' official names do not include "e-club," but clubs may name and brand themselves as e-clubs to emphasize that they meet exclusively or primarily online.

Because of the age of Interact members, all online activities, such as the club website and social media pages, must be operated in accordance with applicable laws and regulations, and sponsor Rotary clubs must obtain written consent of Interactors' parents or legal guardians in advance of Interact participation as necessary.

^ **What are passport clubs?**

Passport clubs are Rotary clubs that are using a model that gives members a more flexible club

experience, such as frequently visiting other clubs, a relaxed attendance policy, and meetings that don't involve a meal and a speaker. The term "passport" refers to the ability to move freely from club to club visiting meetings or participating in their activities. Any Rotarian can visit another club when traveling, but passport clubs encourage their members to do so on a regular basis. This is how passport clubs got their name.

^ **How many passport clubs is a district able to have?**

There is no limit to the number of passport clubs in a district.

CLUB MODELS

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves. The criteria for membership are simple. For Rotary clubs, a member needs to be an adult — or for Rotaract clubs, a person age 18-30 — who demonstrates good character, integrity, and leadership; has a good reputation within their business or profession and community; and willing to serve in the community or have an impact elsewhere in the world. All clubs share similar values and a passion for service, but no two clubs are the same because each community has its own unique needs.

Club Model	Description	Appeals to	Minimum number of charter members
Traditional Rotary Club	Professionals and aspiring leaders who meet regularly for service, connections, and personal growth	People looking for connections, service opportunities, and traditions Learn more at Start a Club .	20
Satellite Club	A Rotary club sponsored by a traditional club but with its own meetings, projects, bylaws, and board	Those who want a club experience or meeting format or time other than what's offered by the traditional clubs in the area Learn more in the Guide to Satellite Clubs .	8
E-Club	A Rotary club that meets primarily online	People who travel frequently, whose schedules make it difficult to meet in person, or who prefer an online experience Learn more about online club meetings .	20
Passport Club	A Rotary club that allows members to attend other Rotary club meetings as long as they attend a specified number of meetings in their own club each year	People who travel frequently, or those who enjoy trying a variety of club experiences and meeting lots of new people Learn more in the Guide to Passport Clubs .	20
Corporate Club	A club whose members (or most of them) work for the same employer	Employees of an organization who want to come together to do good in their community	20
Cause-Based Club	A club whose members are passionate about a particular cause and focus their service efforts in that area	People who want to connect with others while addressing a particular set of problems.	20
Alumni-based Club	A club whose members (or most of them) are former Rotary or Rotary Foundation program participants	People who have participated in Rotary outside of a club	20
Rotaract Club	A club of members ages 18-30 that is sponsored by a Rotary club and often works with that club on projects	Younger people who want to serve their communities, develop leadership and professional skills, and have fun through service. Learn more in the Rotaract Handbook .	n/a

All club models meet at least twice each month. With exception of Rotaract clubs, all active members pay US\$68.00 in annual dues, are counted in Rotary International's database, and have voting privileges.

Leading Meaningful Change

Increase Urgency – Creating a feeling of urgency so that people start talking about doing something about the problems and opportunities. Reducing the complacency, fear, and anger that prevent change from starting.

Build the Guiding Team – Helping pull together the right group of people with the right characteristics and sufficient power to drive the change effort. Helping them to behave with trust and emotional commitment to one another.

Get the Vision Right – Facilitating the movement beyond traditional plans and budgets. Creating the right compelling vision to direct the effort. Helping the guiding team develop bold strategies for making bold visions a reality.

Communicate for Buy-In – Sending clear, credible, and heartfelt messages about the direction of the change. Establishing genuine gut-level buy-in that shows up in how people act. Using words, deeds, and new technologies to unclog communication channels and overcome confusion and distrust.

Empower Action – Removing barriers that block those who have genuinely embraced the vision and strategies. Taking away sufficient obstacles in their organizations and in their hearts so that they behave differently.

Create Short-Term Wins – Generating sufficient wins fast enough to diffuse cynicism, pessimism, and skepticism. Building momentum. Making sure successes are visible, unambiguous, and speak to what people deeply care about.

Don't Let Up – Helping people create wave after wave of change until the vision is a reality. Not allowing urgency to sag. Not ducking the more difficult parts of the transformation, especially the bigger emotional barriers. Eliminating needless work so you don't exhaust yourself along the way.

Make Change Stick – Ensuring that people continue to act in new ways, despite the pull of tradition, by rooting behavior in reshaped organizational culture. Using the orientation process, the leadership succession process, and the power of emotion to enhance new group norms and shared values.

Vision	Collaborative Commitment	Skills	Rewards	Resources	Action Plan
<p>Describe why the change is necessary and how things will work after it's implemented.</p> <p>Consider:</p> <ul style="list-style-type: none"> • What will be different when the change is complete? • Will people do new things to make it work? 	<p>Ask people at all levels of the organization for input.</p> <p>Consider:</p> <ul style="list-style-type: none"> • How can I help people feel committed to the vision? • How can team members contribute their skills, talents, and knowledge? 	<p>Determine what skills are needed to implement and sustain the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> • Do people in key positions have those skills? • If not, how can they learn those skills? • What support or training can we offer? 	<p>Promote the benefits of embracing the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> • How to answer those who ask, "What's in it for me?" • What incentives can we offer? • What activities can we plan to encourage people? 	<p>Develop tools and resources to support the change.</p> <p>Consider:</p> <ul style="list-style-type: none"> • What tools will help team members the most? • How will we make these resources available? • Who will be available to support and encourage people? 	<p>Separate the change into small, manageable steps.</p> <p>Consider:</p> <ul style="list-style-type: none"> • What steps will we take to implement the change? • How will we talk about the change with members, employees, and customers? • How can we make implementing and adopting the change as easy as possible?
<p>What to do:</p> <ul style="list-style-type: none"> • Collaborate on a vision statement. • Engage other leaders and members in group meetings. • Communicate in different ways to reach many audiences. 	<p>What to do:</p> <ul style="list-style-type: none"> • Create teams to collect data and help refine the vision and action plan. • Invite team members to contribute their ideas and expertise. 	<p>What to do:</p> <ul style="list-style-type: none"> • Determine what skills people need and if they are missing any. • Provide training and share the best practices, with examples and lessons you learned. • Offer workshops to give team members practical experience. 	<p>What to do:</p> <ul style="list-style-type: none"> • Hold contests that encourage participation. • Recognize those who are adapting to the change. • Plan activities and events that build the team. 	<p>What to do:</p> <ul style="list-style-type: none"> • Write an FAQ that people can consult. • Create how-to guides for new processes. • Have experts or coaches provide guidance. 	<p>What to do:</p> <ul style="list-style-type: none"> • Make a formal plan. • Create a list of all of the steps. • Agree on what will constitute success. • Gather and share success stories.

Why do some changes fail?

When you incorporate each element of the change plan, you have a better chance of succeeding. Leaving out any element makes the process more difficult, and eliminating more than one may also eliminate your chance of success. Review the chart to understand what may happen without that item.

Vision	Collaborative Commitment	Skills	Rewards	Resources	Action Plan
If you don't explain your vision clearly, people may be confused about the purpose of the change, leading to an incomplete or failed implementation.	People might not commit to a change if they feel that they weren't included in the planning or implementation.	If people lack the skills they need to make the change, anxiety about their lack of knowledge or expertise can lead to resistance.	People may be slow to adopt the change if they don't see the benefits of embracing it.	A lack of resources makes it difficult for people to learn what they need to know. That can cause frustration and resistance to change.	The change you are trying to implement may not get started at all if you haven't thoroughly planned for it.

NOTES:

Diversity, Equity, and Inclusion Statement

A top priority for Rotary is growing and diversifying our membership to make sure we reflect the communities we serve and are inclusive of all cultures, experiences, and identities.

We're creating an organization that is more open and inclusive, fair to all, builds goodwill, and benefits our communities.

To help us achieve our goal, the RI Board of Directors passed a diversity, equity, and inclusion (DEI) statement:

As a global network that strives to build a world where people unite and take action to create lasting change, Rotary values diversity and celebrates the contributions of people of all backgrounds, regardless of their age, ethnicity, race, color, abilities, religion, socioeconomic status, culture, sex, sexual orientation, and gender identity.

Rotary will cultivate a diverse, equitable, and inclusive culture in which people from underrepresented groups have greater opportunities to participate as members and leaders.

Making diversity, equity, and inclusion a priority is everyone's responsibility — from Rotary members to staff at the Secretariat.

What your club can do:

- Talk about diversity with your club members and create a member diversity and inclusion action plan using the Diversifying Your Club assessment.
- Invite local diversity, equity, and inclusion experts to speak at your club's next gathering.
- Connect with local organizations that are supporting diversity, equity, and inclusion efforts and work with them on projects or events.
- Encourage and support people from underrepresented groups to take on leadership positions in your club and district.

Diversity, Equity, and Inclusion Statement

- Encourage club members to take the Building a Diverse Club course in the Learning Center to learn more about diversity, equity, and inclusion.
- Create a community advisory board and invite diverse members from the community and from your club to take part. You'll learn what's important to the community and discover ways to work together to take action.

What the Secretariat is doing:

- The Board set a goal to increase the number of women who are Rotary members and who serve in Rotary leadership positions to 30 percent by June 2023. More women are being appointed to serve as International Assembly training leaders, regional leaders, and Rotary International committee members.
- We continue to support Rotary Fellowships that bring together members from around the world who share a common passion.
- We're creating a strategic plan that supports diversity, equity, and inclusion.

Resources:

Diversifying Your Club, Membership Assessment Tools

Building A Diverse Club, Learning Center course

DIVERSIFYING YOUR CLUB



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

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

OUTCOME

Conduct this diversity assessment and act on its results to:

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

GETTING ORGANIZED

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



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

GETTING STARTED

Ready to start? Here's how.

Step 1: Discuss the benefits of having a diverse membership

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

Step 2: Collect information

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

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

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

Step 3: Discuss the findings within the groups

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

Step 4: Report the results and discuss their implications

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

Does your Rotary club's membership reflect:

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

Step 5: Develop a member diversity action plan

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

Interested in doing other assessments?

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

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

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

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

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



MEMBER DIVERSITY WORKSHEET

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

2. What data did you find on:

Age:

Gender:

Ethnic background:

3. Does this data correspond to the current composition of working professionals in your community? Explain your evidence.

4. What fact or statistic did you find most interesting?

5. What surprised you most?

6. What surprised you least?

7. Are any demographic groups underrepresented in the club?

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

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

REPRESENTING YOUR COMMUNITY'S PROFESSIONS



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

OUTCOME

Conduct this classification assessment and act on its results to:

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

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

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

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

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

GETTING ORGANIZED

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



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

GETTING STARTED

Ready to start? Here's how.

Step 1: Gather member data

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

Step 2: Evaluate the data

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

Step 3: Collect data on your community

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

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

Step 4: Analyze the data

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

Step 5: Present the results

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

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

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

Step 6: Take action

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

Interested in doing other assessments?

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

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

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

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

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



OCCUPATION AND PROFESSIONAL EXPERTISE SURVEY (FROM STEP 1)

1. What is your current profession? If retired, give your most recent profession.
2. Have you had other professions, or do you have other expertise that's not related to your current profession?
3. In what industry do you work? (For example, food industry, publishing, etc.)

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

CLASSIFICATION AUDIT

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

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

CLASSIFICATION WORKSHEET

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

ACTION PLAN

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

Action	Person responsible	Time frame	Resources needed

Module C-7: Identifying and Leading Change For Progress Sake

Breakout Room Questions

1. Refer to the Be A Vibrant Club brochure and Flexible options for clubs and Club Models handouts in your PETS Workbook.
What makes a vibrant club? Read p. 4 of brochure.
How to you know if your club is making progress towards being vibrant?
How can you use the flexible options and new club models to make progress towards being vibrant?
2. Refer to both Leading Meaningful Change resource page and A Model For Change Planning chart in your PETS Workbook.
As Club President, in what ways can you promote change within the club?
Which steps of leading change are most challenging to accomplish?
3. Refer to the Rotary Diversity, Equity, and Inclusion policy and the diversity and classification assessment tools in your PETS Workbook.
What can you do as Club President to inspire change in order to build a diverse and representative club membership to make an impact in your community.
List three key points.

4. After reviewing the Change literature and sharing in your breakout rooms for this Change module, it is time to start formulating your action plan for change in your club during your year as Club President. Club Presidents-Elect should begin to plan for their year.
List three critical areas of needed change for your club.
List one action step for each change area.
Share back with your group.
Make sure to get feedback from group members.
5. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
6. What is your **primary takeaway** from the Change session?
7. Any other question(s)?

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal blue lines across its entire width. The lines are thin and consistent in color, set against a plain white background. There are no margins, text, or other markings present on the page.

All Modules: Your PETS Experience: Final Takeaways

Following the conclusion of all of the PETS sessions, answer the questions below as you continue to plan for an impactful year as Club President or President-Elect.

Discussion Questions

Takeaways For Your Club

1. List three takeaway strategies for your Club.
 - a.
 - b.
 - c.
2. Which strategy is the most critical to the vibrancy of your Club?

Takeaways For Yourself

3. List three takeaway strategies for yourself.
 - a.
 - b.
 - c.
4. Which strategy is the most critical to the vibrancy of yourself as Club President or President-Elect?

Most Impactful Takeway

5.

[illegible]