

2023 LONE STAR P.E.T.S.



February 23-26, 2023

**President-Elect
Workbook**

Goal: Prepare incoming club Presidents to become leaders of vibrant Rotary clubs

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Rotary Club Leader:

Congratulations on being selected the President-Elect and 2023-2024 President of your Rotary Club or Rotaract Club.

Our goal at Lone Star President-Elect Training Seminar (P.E.T.S.) is to help you prepare for your year as your Rotary Club President. We encourage you use what you learn at P.E.T.S. to help you prepare. Attending Lone Star P.E.T.S. is a great start. Other training resources also are available:

1. Contact former Presidents of your Rotary Club. They can assist as mentors.
2. Develop a good relationship with your Leadership Team. You can develop continuity of programs and goals for your club by working together.
3. Participate in each training session and event by your District. You will develop a broad knowledge of the many Rotary programs in which your club members might wish to participate.
4. Visit other clubs and learn how they operate. Every Rotary club is different. You might see how other clubs solved a problem your club might have.
5. View the Learning Center training videos on the Rotary International website.

This workbook involved many hours by Rotary volunteers. The outstanding P.E.T.S. program will enable you to learn and plan.

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 speakers during meals. Complete evaluations.

May the next two years be your best years in Rotary. Enjoy your Rotary experiences!

Yours in Rotary,

PDG Cesar Caro

2022 Operating Chair
Lone Star P.E.T.S., Inc.



2023 Lone Star PETS

MODULE A-1

Becoming a Vibrant Club Leader

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT / PRESIDENTS – NOMINEE WORKBOOK

FRIDAY, FEBRUARY 24, 2023

MODULE A-1 BECOMING A VIBRANT CLUB LEADER

GOAL:

Club leaders will develop and learn their roles with resources and tools for leadership to become vibrant leaders.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. List characteristics of and resources available for developing a vibrant leader.
2. List specific responsibilities of the club President and President-Elect.
3. Explain how the club President and President-Elect can work collaboratively with club leaders to support the structure of a vibrant Rotary Club.
4. Discuss the importance of a strong leadership team and committee structure in building a vibrant and impactful Rotary Club.

REFERENCE MATERIALS:

Be a Vibrant Club

Creating Your Club Leadership Plan, PETS Workbook page 40



Module A-1: Becoming A Vibrant Club Leader

Breakout Discussion Questions:

1. List characteristics of a vibrant leader.
2. What resources are available to assist you in becoming a vibrant leader?
3. What most excites you about being your club's President?
4. List specific responsibilities of the club President and President-Elect.
5. What most concerns you for next year?
6. Refer to Be a Vibrant Club. How do collaborative efforts between President and President-Elect strengthen a club?
7. See Creating Your Club Leadership Plan on p. 40 of PETS Workbook. Discuss the importance of a strong leadership team and committee structure for a vibrant, impactful club.
8. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
9. What is your **primary takeaway** from the Vibrant Club Leader session?
10. Any other question(s)?



2023 Lone Star PETS

MODULE A-2

Developing a Vibrant Rotary Club

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT / PRESIDENTS – NOMINEE WORKBOOK

FRIDAY, FEBRUARY 24, 2023

MODULE A-2 DEVELOPING A VIBRANT ROTARY CLUB

GOAL:

Club leaders will learn resources, governance, and setting multi-year goals and plans for a vibrant Rotary Club.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Explain the benefits of strategic planning to maintain a vibrant club.
2. Outline the planning process to set multi-year goals and develop an action plan for the club.
3. Describe how to use the Rotary citation to list your goals in Rotary Club Central.

REFERENCE MATERIALS:

Strategic Planning Guide, PETS Workbook page 45

Rotary Vision Statement, PETS Workbook page 54

Rotary Citation Goals and Instructions, PETS Workbook page 55

How to Access Rotary Club Central, PETS Workbook page 57

Rotary's Action Plan, PETS Workbook page 59



Module A-2: Developing a Vibrant Rotary Club

Breakout Discussion Questions:

1. Refer to Strategic Planning Guide on p. 45 of PETS Workbook. What are benefits of a three-year strategic plan to maintain a vibrant club?
2. What are benefits of good financial management procedures? What ways ensure good stewardship of club funds?
3. How does your club reflect Rotary's vision statement?
4. Refer to p. 55 and 59 in the PETS Workbook. What steps help create meaningful goals and effective action plans for your Rotary Club?
5. How far have you progressed in setting club goals for the coming year?
6. See Rotary Citation Goals and Instructions on p. 55 of PETS Workbook. Describe how to use the Rotary Citation to plan and list goals in Rotary Club Central (p. 57 PETS Workbook).
7. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
8. What is your **primary takeaway** from the vibrant Rotary Club session?
9. Any other question(s)?



2023 Lone Star PETS

MODULE A-3

*Growing and Engaging
Club Membership*

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT / PRESIDENTS – NOMINEE WORKBOOK

FRIDAY, FEBRUARY 24, 2023

MODULE A-3 GROWING AND ENGAGING CLUB MEMBERSHIP

GOAL:

Club leaders will learn tools to develop effective membership plans for the club.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Describe how a President can create a club atmosphere welcoming to all.
2. Share strategies and best/worst practices to attract, engage, and retain members.
3. List key elements of club membership health.

REFERENCE MATERIALS:

Impact Begins with You, PETS Workbook page 63

Member Resource Guide, PETS Workbook page 65

Rotary International Harassment Policy, PETS Workbook page 71

Club Health Check, PETS Workbook page 73

Strengthening Your Membership, Creating Your Membership Plan, PETS Workbook page 85



Module A-3: Growing and Engaging Club Membership

Breakout Discussion Questions:

1. What helped you get engaged in your club?
2. Refer to Rotary International Harassment Policy on p. 71 of your PETS Workbook. How can you as President create a club atmosphere welcoming to all?
3. Refer to Impact Begins with You on p. 63 of the PETS Workbook. What can your club do differently to attract/retain Rotary members who can make an impact?
4. What strategies have you used to attract new members?
5. What are keys to engagement from your perspective?
5. Refer to Club Health Check (p. 73), Creating Your Membership Plan (p. 85), and other membership assessment tools in your PETS Workbook. How can a systematic approach help club progress?
6. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
7. What is your **primary takeaway** from Membership session?
8. Any other question(s)?



2023 Lone Star PETS

MODULE A-4

*Understanding and Supporting
Our Rotary Foundation*

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT / PRESIDENTS – NOMINEE WORKBOOK

FRIDAY, FEBRUARY 24, 2023

MODULE A-4 UNDERSTANDING AND SUPPORTING OUR ROTARY FOUNDATION

GOAL:

Club leaders will learn to develop member support for and understanding of The Rotary Foundation.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Explain how participation in programs of The Rotary Foundation attract, engage, and retain members.
2. Explain how your club goals and support for The Rotary Foundation fund local and international projects.
3. Discuss the importance of a trained Foundation Chair and Committee to the club's impact in communities.
4. Identify types of individual and club recognitions for giving to our Foundation.

REFERENCE MATERIALS:

Rotary's Areas of Focus, PETS Workbook page 118

Individual and Club Recognitions, PETS Workbook page 149



Module A-4: Understanding and Supporting Our Rotary Foundation

Breakout Discussion Questions:

1. How does participation in Rotary Foundation programs attract, engage, and retain members?
2. Explain how your club goals and support for The Rotary Foundation fund local and international projects.
3. What is some work accomplished through our Foundation? Refer to Rotary's Areas of Focus on p. 118 of the PETS Workbook.
4. Discuss the importance of a trained Foundation Chair and Committee to the club's impact in communities.
5. What are some individual and club recognitions for giving to our Foundation (Sustaining Member, Paul Harris Fellow, Paul Harris Society, etc.)? Refer to Individual and Club Recognitions on p. 149 of the PETS Workbook.
6. Give participants a few minutes to write 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)?



Icebreaker and Midway Review Questions:

Icebreaker

Use an Icebreaker, with each participant sharing:

- a. Name
- b. Role at PETS
- c. Club
- d. City
- e. Most important characteristic for a Rotary leader

- f. Desired individual takeaway from PETS

Midway Review

1. What is your ***primary takeaway*** from PETS thus far?

2. Any other question(s) or comments?



2023 Lone Star PETS

MODULE B-5

*Developing Effective
Service Projects*

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT WORKBOOK

SATURDAY, FEBRUARY 25, 2023

MODULE B-5 DEVELOPING EFFECTIVE SERVICE PROJECTS

GOAL:

Club leaders will learn skills to guide members to plan, implement, and evaluate effective service projects.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

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

REFERENCE MATERIALS:

Conducting Service Projects, PETS Workbook page 159

What Makes a Service Project Effective?, PETS Workbook page 161



Module B-5: Developing Effective Service Projects

Breakout Discussion Questions:

1. What is the value of local service projects?
What is the value of international service projects?
How would you decide the best mixture for your club?
2. See What Makes a Service Project Effective? (p. 161 in PETS Workbook). What elements make an effective project? Which element is most important? Which element(s) in your club's project needs your leadership as President?
3. What is a key service project in your club? How do you discover who has leadership and passion for service projects? Who would make a good service chair?
4. Give participants a few minutes to write 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)?



2023 Lone Star PETS

MODULE B-6

*Strategies for Effective
Fundraising*

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT WORKBOOK

SATURDAY, FEBRUARY 25, 2023

MODULE B-6 STRATEGIES FOR SUCCESSFUL FUNDRAISING

GOAL:

Club leaders will be able to lead their clubs in successful fundraising.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Identify the roles of the President and President-Elect in club fundraising.
2. Identify fundraising purposes and best practices.
3. Create a successful fundraiser.

REFERENCE MATERIALS:

Planning Fundraising Events, PETS Workbook page 170

Signature Projects, PETS Workbook page 171

Event Planning Guide, PETS Workbook page 172



Module B-6: Strategies for Successful Fundraising

Breakout Discussion Questions:

1. As President, how will you engage members to create a successful fundraiser to increase funds and membership in your club?
2. What are current fundraising purposes and best practices in your club? Which fundraisers raise most money for the work of Rotary in your community? How can you increase Rotary awareness and measure impact of a fundraiser in your community?
3. See Signature Projects (p. 171) in the PETS Workbook. Which of your clubs has a signature project and what is it? How do signature project and fundraising foster ongoing awareness of impact of Rotary in your community?
4. What best practices and steps are involved in creating a successful fundraiser?
5. How might you manage risk in your club fundraiser?
6. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
7. What is your **primary takeaway** from the Fundraising session?
8. Any other question(s)?



2023 Lone Star PETS

MODULE C-7

*Enhancing the Public Image
of Your Rotary Club*

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT WORKBOOK

SATURDAY, FEBRUARY 25, 2023

MODULE C-7 ENHANCING THE PUBLIC IMAGE OF YOUR ROTARY CLUB

GOAL:

Club members will learn how to enhance Rotary public image in their community.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Identify the roles of club president, public image committee, and individual Rotarians in enhancing the local image of Rotary.
2. Identify public image purposes, best practices, and impacts of your Rotary Club.
3. Evaluate public image strategies, talking points, and your 30-second Rotary impact speech.

REFERENCE MATERIALS:

Key Points for Talking About Rotary, PETS Workbook page 185

Rotary Talking Points, PETS Workbook page 187

Strategies for Promoting Your Club, PETS Workbook page 188

Rotary Public Relations Guide, PETS Workbook page 191

Quick Start Guide for Club Social Media Pages, PETS Workbook page 204

How to Add a Project to Rotary Showcase, PETS Workbook page 218

Module C-7: Enhancing the Public Image of Your Rotary Club

Breakout Discussion Questions:

1. Identify the roles of club President, public image committee, and individual Rotarians in creating a successful public image campaign to enhance the local image of your Rotary Club. How can the club President engage members to create a public image campaign?
2. What are methodologies/tools/elements of a public image campaign?
3. Identify public image purposes, best practices, and impacts of your Rotary Club. What public image practices most promoted Rotary in your club and community?
4. Create a short advertisement for your club to promote Rotary.
5. Evaluate public image strategies, talking points, and your 30-second Rotary impact speech.
6. What are *your own* public image best practices?
7. What is *your own* 30-second Rotary impact story?
8. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
9. What is your **primary takeaway** from the Public Image session?
10. Any other question(s)?



2023 Lone Star PETS

MODULE C-8

Moving Your Rotary Club Forward

Lone Star P.E.T.S. 2023

PRESIDENTS – ELECT WORKBOOK

SATURDAY, FEBRUARY 25, 2023

MODULE C-8 MOVING YOUR ROTARY CLUB FORWARD

GOAL:

Club leaders will have insight to assess and lead change in their Rotary Club.

OBJECTIVES:

At the end of the session, club leaders will have learned and be able to:

1. Recognize the Club President's role in leading changes to be a vibrant club.
2. Diversify the club format.
3. Diversify club membership.

REFERENCE MATERIALS:

Be a Vibrant Club

Flexible Options for Clubs, PETS Workbook page 222

Leading Meaningful Change, PETS Workbook page 229

A Model for Change Planning, PETS Workbook page 230

Rotary Diversity, Equity, and Inclusion Policy, PETS Workbook page 232

Module C-8: Moving Your Rotary Club Forward

Breakout Discussion Questions:

1. Refer to Leading Meaningful Change (p. 229) and A Model for Change Planning (p. 230) in PETS Workbook. As President, list 3 critical areas and an action step for change needed in your club. How can you inspire change to build diverse and representative club membership to impact your community?
2. Diversify the club format. Refer to Be a Vibrant Club and Flexible Options for Clubs (p. 222) and Club Models handouts in the PETS Workbook. Why is diversifying club format important? What specific ways has your club diversified? How might you use new Rotary flexible options to increase diversity and variety in club meetings? How should you update your By-laws to reflect changes in your club?
3. Diversify club membership. Refer to Rotary Diversity, Equity, and Inclusion policy (p. 232), Diversifying Your Club (p. 236), and diversity and classification assessment tools in your PETS Workbook. Why are member diversity and inclusion important? What groups in your community are lacking from your club? What ways can your club use to diversify membership? What new membership types might your club consider?
4. Give participants a few minutes to write action ideas on the Notes page at the end of this module.
5. What is your **primary takeaway** from the Diversity session?
6. Any other question(s)?
7. Ask President-Elects to refer to Questions and Answer the Final Takeaways: Your PETS Experience: All Modules.
List 3 takeaway strategies for your club:
Which strategy is most critical to the vibrancy of your club?
List 3 takeaway strategies for yourself:
What strategy is most critical to the vibrancy of yourself as President?
What is the Most Impactful Takeaway?



All Modules: Your PETS Experience: Final Takeaways

Following the conclusion of all PETS sessions, answer the questions as you continue to plan an impactful year as Club President.

Discussion Questions:

Takeaways for Your Club:

1. List three takeaway strategies for your Club.
 - a.
 - b.
 - c.
2. Which strategy is most critical for vibrancy of your Club?

Takeaways for Yourself:

3. List three takeaway strategies for yourself.
 - a.
 - b.
 - c.
4. Which strategy is most critical to your vibrancy as Club President?

Most Impactful Takeaway:

- 5.

Rotary



| 2023 Lone Star PETS

SUPPLEMENTAL RESOURCES

MODULE A-1

Becoming a Vibrant Club Leader

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:



Rotary Newsletters

Newsletters help you stay current on topics of interest. Anyone can subscribe once they create an account and sign in.

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.

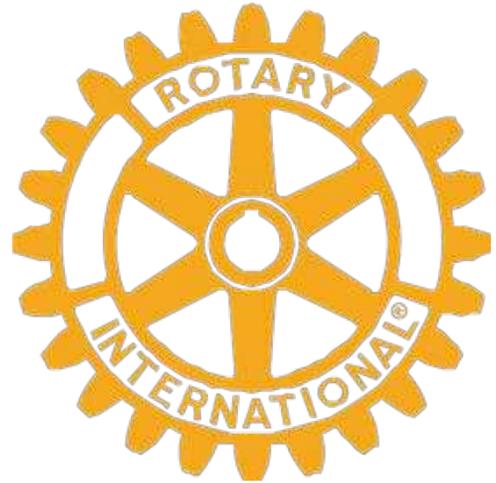
Rotary Youth Exchange - Information and updates on current Youth Exchange events and resources.

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:
<p>District Vibrant Club Workshop Determined by district</p>	<p>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.</p>	<p>District Rotary Foundation committee District membership committee District public image committee District training committee</p>	<p><u>Trainers</u></p>
<p>Grant Management Seminar Determined by district</p>	<p>Club presidents-elect (or appointees) learn how to manage Rotary grants.</p>	<p>District Rotary Foundation committee District training committee</p>	<p><u>Trainers</u> (for in-person seminars) <u>Trainers</u> (for online seminars) <u>Participants</u></p>
<p>Rotaract Club Officer Training Anytime after club open elections and before 30 June</p>	<p>Incoming Rotaract club leaders, Rotaractors, and interested Rotarians and non-Rotarians learn about Rotaract.</p>	<p>District Rotaract representative</p>	<p><u>Trainers</u> <u>Participants</u></p>

Rotary



| 2023 Lone Star PETS

SUPPLEMENTAL RESOURCES

MODULE A-2

Developing a Vibrant Rotary Club

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/Rotactor 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 I — 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?



TIP

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.



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?



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



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

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

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?

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.

Sign In Register

JOIN GIVE

Foundation News & Media Member Center

SIGN IN TO MY ROTARY

REGISTER FOR AN ACCOUNT

2

Select **Member Center**

3

Select **Rotary Club Central**

JOIN US!

Tell us why you're interested in Rotary and we'll help you find the right club.

REFER A MEMBER

Refer a potential member and we'll help connect them to the right club. Only current members can refer new members. To refer someone to your own club, contact your club secretary.

REFER A MEMBER

ROTARY GLOBAL REWARDS

Explore our member benefit program for discounts on travel, hotels, dining, and entertainment.

REWARDS

ONLINE TOOLS

Rotary Club Central

Brand Center

Rotary Showcase

Rotary Ideas

Learning Center

INTERNATIONAL CONVENTION



Plan now to attend Rotary's biggest event of the year. It's your chance to connect with members from around the world.

REGISTER

THE ROTARIAN

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





| 2023 Lone Star PETS

SUPPLEMENTAL RESOURCES

MODULE A-3

*Growing and Engaging
Club Membership*



CONNECT WITH A ROTARY CLUB TODAY

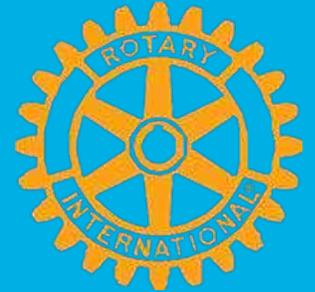
Rotary members join clubs by invitation. Let us help you connect with a club that may be right for you. With 35,000 clubs around the world, and others that meet online, Rotary makes it easy to get involved and start making a difference today.

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.



IMPACT BEGINS WITH YOU



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.

HOW ARE WE DIFFERENT?

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.

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.

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.

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

CONNECT WITH US:

001-NA-(316)

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.

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

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.

IMPACT ACROSS THE WORLD

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.**

MEMBERSHIP RESOURCE GUIDE



EMILY TUCKER

+1-847-866-3258
Emily.Tucker@Rotary.org
Zones 25B and 29 Central United States, Texas, & part of Ontario, Canada

As your Regional Membership Officer, I can assist you in developing and implementing membership development strategies by helping you analyze and understand membership data, create and deliver membership training sessions, and discover relevant resources and tools to meet your membership goals. Here are several key membership topics that we can discuss to help you strengthen membership in your zone, district, or club:

- ◊ Attraction + recruitment
- ◊ Engagement + retention
- ◊ Club flexibility + development
- ◊ Diversity, equity, + inclusion

I'm always happy to set up a call or video chat to brainstorm, answer questions, and offer guidance and support. I'm here for you!



STRENGTHEN YOUR MEMBERSHIP

CLICK ON LINKS BELOW

ASSESS

- [Club Planning Assistant](#) - Respond to questions about your club and get links to specific resources to address your club's challenges.
- [Rotary Club Health Check](#) - This resource helps club leaders pinpoint opportunities for growth and prescribes resources to help remedy problem areas.
- [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.
 - ◊ [Diversifying Your Club](#) (member diversity assessment)
 - ◊ [Improving Your Member Retention](#) (retention assessment)
 - ◊ [Enhancing the Club Experience](#) (member satisfaction survey)
 - ◊ [Understanding Why Members Leave](#) (exit survey)

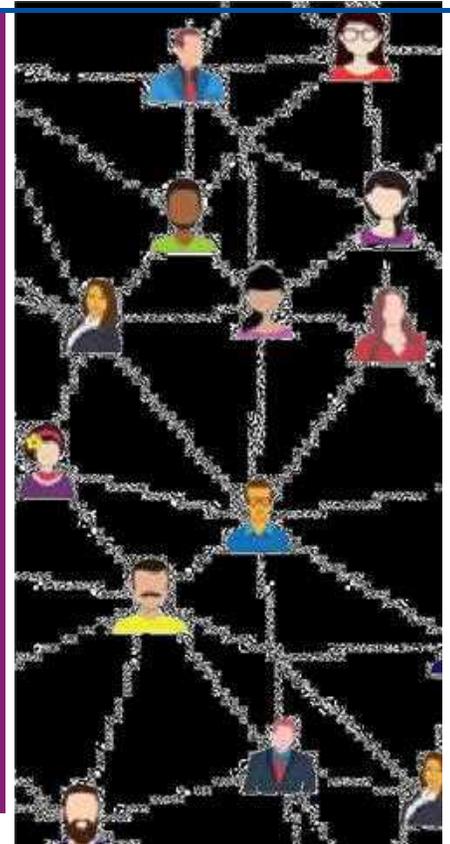
WELCOME

- [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.
- [Rotary Basics](#) - This comprehensive guide to all things Rotary covers everything from how Rotary began to how you can optimize your membership experience.
- [Connect for Good](#) - This eight-page guide shows how to get involved and connect with Rotary.
- [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.

MEMBERSHIP RESOURCE GUIDE

ATTRACT

- [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
- [Engaging Younger Professionals](#) - This online toolkit can help clubs connect with Younger 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.
- [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.
- [Connecting with Prospective Members in your Community](#) - Watch this webinar 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.



Want to learn more?

For interactive learning, visit the membership topic on the [Learning Center](#).

Didn't find the resource you were looking for?

E-mail me at Emily.Tucker@rotary.org

ENGAGE

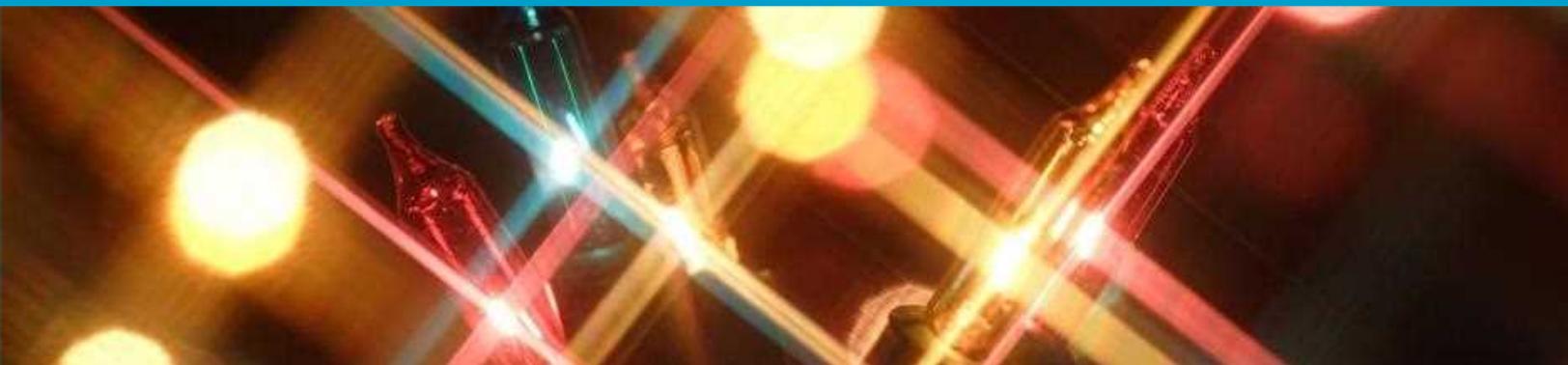
- [Be A Vibrant Club](#) - A quick guide for clubs with strategies for enhancing your club's structure, activities, and even culture.
- [Best Practices for Engaging Members](#) - **Revised!** Is your club losing more members than it's gaining? It's time to get serious about engaging members.
- [Flexible Options for Clubs](#) - Learn different ways clubs can implement flexible options to best meet the needs of their members. This includes links to frequently asked questions, governance documents, and start guides for alternative membership types, and flexible meeting formats.

November RMO

Membership Update

Growing Rotary Through Events | Sharing Your Stories | Club Survey Results | Membership Leads Update | New Club Development Update |

District Progress to Goal



LEVERAGING LOCAL EVENTS TO GROW ROTARY

I'm happy to share a new toolkit: [Leveraging Local Events to Grow Rotary: A Membership and Marketing Guide](#). This resource walks district leaders through a strategic plan to prepare clubs for potential membership growth that comes with an increased interest in Rotary, particularly when there is a large event in their area. District leaders will find tips for engaging a strong leadership team, getting clubs ready, planning promotions, and learning about prospective members. Within the guide there are links to several additional resources I wanted to highlight:

SHARING YOUR STORIES



People of action motivate and inspire others, giving them hope that the world can change for the better. Do you know of clubs in your area that are exemplifying Rotary's values? [Share this form](#) with them so they can tell us how they are cultivating an environment of comfort and care for members and participants, sharing their values with new audiences, creating new ways for people to experience the power of Rotary, and/or proving we are an organization that's inclusive, engaging, compassionate, and ambitious.

WE ASKED CLUBS: WHAT'S YOUR GREATEST MEMBERSHIP CHALLENGE?

Recently, the Membership Development team sent the Club Planning Assistant survey to all club presidents and club membership chairs worldwide and asked them to share their greatest membership challenges.

After identifying their top three issues, club leaders were then asked which of the four options listed in the table below was their biggest challenge. Of the 4,316 clubs that responded, 41% identified attracting new members as their biggest challenge, 42% said engaging members and delivering value, 15% said making a meaningful difference in our community, and 4% said that they have no issues and their club is thriving.

Based on their responses, club leaders received a customized report that recommended specific resources and ideas to help them address their membership challenges. Take a look at the chart below to view the responses from our zones.

**Please note, I am not able to split out the data by zone section, so Zone 25 includes both 25A and 25B.

Zone	Response Rate	Attracting Members Delivering Members	Engaging New and Value	Making a meaningful difference in our community	None, Our Club is
Zone 25 (Includes A and B)	11% of clubs responded	30	58	10	2
Zone 29	8% of clubs responded	60	32	2	6

So, what can we do to act on this data?

- ◆ **Assess Plans:** Discuss the results with your district membership team. Do they confirm what you already knew, or was something surprising? How do the overall results align with membership strategies and goals for your district?
- ◆ **Update Information:** Modify upcoming or future membership presentations and meetings to reflect the challenges that clubs in our zones identified.
- ◆ **Reach Out to Club Leaders:** Reach out to club leaders to determine how you can offer support and assist in utilizing the resources, tools, or online courses available on My Rotary: https://my.rotary.org/en/learning-reference/learn-topic/membership_____

Want to connect more clubs in your region with customized resources? Share a link to the [Club](#)

MEMBERSHIP LEADS REPORT

In the Prospective Member Progress Analysis report, you can view data on how your district is managing prospective members who express interest in joining a Rotary club through the Membership Leads platform in My Rotary.

You can view up to date information on what percentage of prospective members have or have not been followed up on and how many prospective members have been admitted to clubs.

We've had some good movement, especially at the district level, with leads management as compared to previous years. Remember, there is a new guide with screen shots to assist clubs in managing leads.

DISTRICT MEMBERSHIP PROGRESS TO GOAL REPORT

Below are a couple highlights from the November 2022 District Membership Progress to Goal report.

Highest % of members under 40: District 5840 in Zone 25B @ 7.87% District 5630 in Zone 29 @ 11.18%

For the full Zone 25B report, [click here](#). For the full Zone 29 report, [click here](#).

NEW CLUB DEVELOPMENT PROGRESS

As you and other district leaders work to create new club experiences that attract and engage members based on their interests and needs, I'll share updates on recent new Rotary, Rotaract, and Rotary Satellite clubs.

Congratulations to the following clubs that have chartered or been officially recognized since 1 July 2022!

Rotary Club of Changemakers, WI (D6250)
Rotaract Club of Texas A & M University, TX (D5910)

Rotary Satellite Club of Waupaca - Friends of D6220 Exchange, WI (D6220)

Rotary Satellite Club of Ending Forced Organ Harvesting, KS (D5710)

Rotary Club of Downtown Palestine, TX (D5910)
Rotary Club of Rancho Viejo, TX (D5930)

Rotaract Club of DCTC, MN (D5950)

REGIONAL HIGHLIGHT: CHICAGO CITYWIDE SERVICE

When it comes to caring for members, providing flexible and fun ways to engage, and making an impact, the Rotary Club of Chicago Citywide Service is walking the walk. Since chartering in March of 2021, they've surveyed members twice and are constantly adapting to meet member needs and attract prospective members with a variety of opportunities to participate. They are a service-focused passport club that offers hybrid meetings on Sunday afternoons at Half Sour, a hip Jewish deli and bar, with occasional meetings at a more upscale location – Cliff Dwellers. Plus, they do 2-3 service projects per month all over Chicago depending on where there's a need. A few of their recent local projects include:

- Working with Lasagna Love to provide meals to families

- Baking holiday cookies with Little Brothers – Friends of the Elderly Chicago

- Helping Chicago Furniture Bank to organize home furnishings for Chicagoans facing poverty

Their impact goes beyond Chicago though. They're currently coordinating a service project trip, open to members and guests in Districts 6450 and 6440, to Southwest Uganda in February where they're partnering with the Rotaract Club of Kampala South to complete a school building at the Nyakijumba Primary School in Kabale, Uganda.

With 22 members, they have a service project committee of 5-6 members that takes project suggestions from the club, aligns them with our 7 areas of focus, and empowers members to take ownership of their project ideas. They even have a member in Uganda who joins meetings virtually and does service projects in their own community.



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.

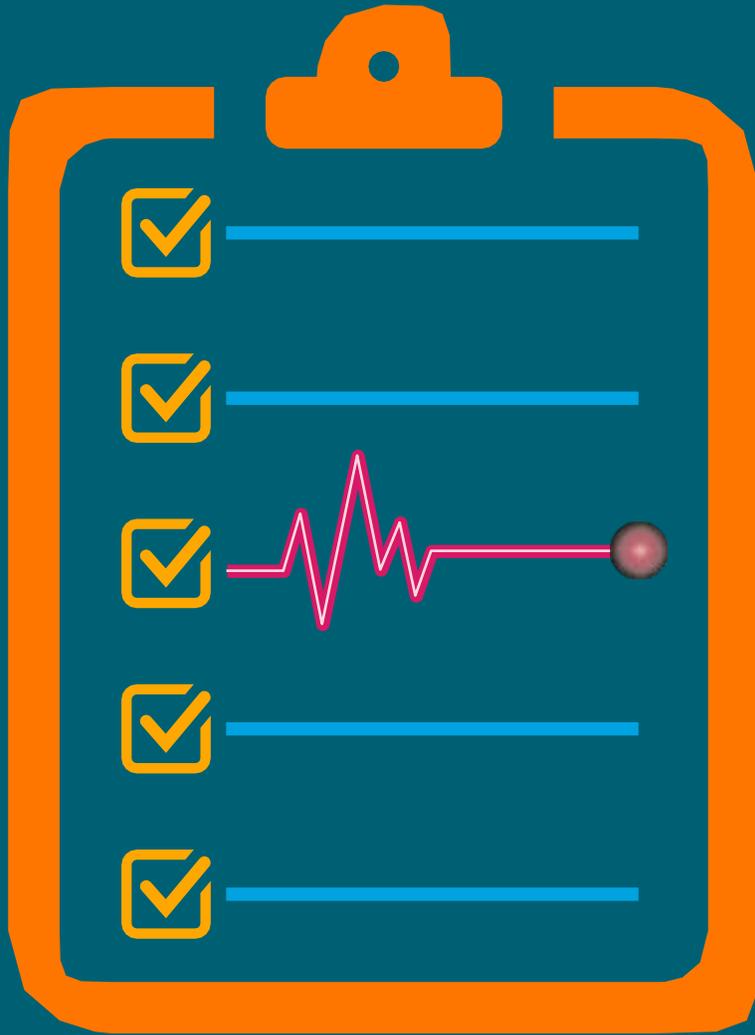
- Acknowledge every report with respect
- Report the allegation to the appropriate person or committee
- Review the complaint and determine who to interview
- Conduct a thorough investigation
- Write a summary of the incident including any action you recommend
- Remove the accused person from youth activities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



CLUB HEALTH CHECK

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

YOUR CLUB EXPERIENCE



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

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

COMMENTS

SEE THE NEXT PAGE FOR YOUR
PROGNOSIS AND REMEDIES





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

PROBLEM AREA	PRESCRIPTION
Club meetings	<ul style="list-style-type: none"> <li data-bbox="526 457 1430 520">+ Try something new at a meeting. For example, show one of these inspirational speeches and have a discussion afterward. <li data-bbox="526 552 1414 615">+ Hold online meetings when in-person meetings aren't feasible, or allow some members to connect virtually and others to attend in person. <li data-bbox="526 646 1321 709">+ Find a skilled person in the club or district who can facilitate and run online meetings. <li data-bbox="526 741 1338 804">+ Contact your Club and District Support representative or your regional membership officer for ideas.
Rotary experience beyond the club	<ul style="list-style-type: none"> <li data-bbox="526 869 1024 900">+ Sponsor another Rotaract or Rotary club. <li data-bbox="526 932 1057 963">+ Start or get involved in an Interact program. <li data-bbox="526 995 1377 1058">+ Connect members to Rotary's various programs. Sponsor an Interact club, organize a RYLA event, create a scholarship, or start an exchange. <li data-bbox="526 1089 1474 1121">+ Remind members that they can join a Rotary Fellowship or Rotary Action Group. <li data-bbox="526 1152 1438 1215">+ Promote district events that are open to all members. Have someone who has attended in the past talk about the experience. <li data-bbox="526 1247 1377 1310">+ Promote the work that Rotary and Rotaract do both globally and locally, including polio eradication. <li data-bbox="526 1341 1435 1404">+ Work with your local Toastmasters club to build leadership and communication skills among members. <li data-bbox="526 1436 1438 1499">+ Visit other clubs to connect with new people and see what they're doing that your club could try.
Unmet expectations	<ul style="list-style-type: none"> <li data-bbox="526 1549 1438 1612">+ Find out what experience your members want to get out of your meetings by using the Member Satisfaction Survey, and then give them that experience. <li data-bbox="526 1644 1370 1707">+ Encourage members to develop leadership skills by taking online courses developed by Toastmasters International.

SERVICE AND SOCIALS



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

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

COMMENTS



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

PROBLEM AREA	PRESCRIPTION
Opportunities for service	<ul style="list-style-type: none"> <li data-bbox="602 527 1430 632">+ Sponsor an Interact club, organize a RYLA event, create a scholarship, start an exchange, join a Rotary Action Group, or support the Rotary Peace Centers. <li data-bbox="602 657 1256 695">+ Let members know about Rotary's exchange programs.
Quality of projects	<ul style="list-style-type: none"> <li data-bbox="602 753 1390 825">+ Use Community Assessment Tools and A Guide to Global Grants to improve the quality of your projects. <li data-bbox="602 850 1425 888">+ Connect with your Cadre advisers to get guidance on service projects. <li data-bbox="602 913 1409 984">+ Evaluate your club's service projects to determine if repeating them is worth the effort.
Social activities	<ul style="list-style-type: none"> <li data-bbox="602 1037 1471 1075">+ Put one or two members in charge of organizing socials throughout the year. <li data-bbox="602 1100 938 1138">+ Join a Rotary Fellowship. <li data-bbox="602 1163 1365 1201">+ Find or create a variety of events with different times or formats.
Leadership	<ul style="list-style-type: none"> <li data-bbox="602 1253 1438 1325">+ Help your members develop and practice their leadership skills. Promote the Learning Center's professional development catalog. <li data-bbox="602 1350 1170 1388">+ Give new and young members leadership roles.

MEMBERS



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

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

COMMENTS



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

PROBLEM AREA	PRESCRIPTION
Member diversity	<ul style="list-style-type: none"> <li data-bbox="602 520 1377 590">+ Attract a wide array of members by using Diversifying Your Club: A Member Diversity Assessment. <li data-bbox="602 617 1442 686">+ Learn about Rotary's Commitment to Diversity, Equity, and Inclusion and related efforts.
Professional diversity	<ul style="list-style-type: none"> <li data-bbox="602 747 1417 816">+ Expand the skill sets of your members by recommending professional development courses.
Stagnant or declining membership	<ul style="list-style-type: none"> <li data-bbox="602 882 1094 915">+ Create a membership development plan. <li data-bbox="602 942 1370 1012">+ Learn how to connect to prospective members and manage your membership leads in one place. <li data-bbox="602 1039 1175 1073">+ Target prospective members using this exercise. <li data-bbox="602 1100 1401 1169">+ Teach members your club's process for proposing new members and explain that they can also refer qualified prospects to other clubs. <li data-bbox="602 1197 1450 1266">+ Make sure that members are aware of all the ways they can be involved with Rotary besides through attending club meetings.
Members leaving	<ul style="list-style-type: none"> <li data-bbox="602 1318 1430 1388">+ Start with the Enhancing the Club Experience: A Member Satisfaction Survey to improve current members' experience. <li data-bbox="602 1415 1433 1484">+ Learn and act on trends using the Improving Your Member Retention: A Retention Assessment and Analysis. <li data-bbox="602 1512 1474 1581">+ Use the exit survey in Understanding Why Members Leave to consider the reasons your club can address. <li data-bbox="602 1608 1451 1677">+ Let resigning members know they can rejoin or change clubs when they are ready and stay in touch in the meantime. <li data-bbox="602 1705 1232 1738">+ Encourage Rotaractors to consider dual membership.
Orientation and Rotary knowledge	<ul style="list-style-type: none"> <li data-bbox="602 1789 1450 1858">+ Offer new member orientation, professional development, and ongoing learning opportunities from Rotary's Learning Center.

IMAGE



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

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

COMMENTS



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

PROBLEM AREA	PRESCRIPTION
Community awareness	<ul style="list-style-type: none"> <li data-bbox="602 527 1312 594">+ Find resources in Rotary's Press Center and use them in your community's media. <li data-bbox="602 625 1474 693">+ 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"> <li data-bbox="602 751 1377 819">+ Find editable club brochures and membership materials in Rotary's Brand Center. <li data-bbox="602 850 1446 879">+ Follow the Visual and Voice Guidelines in any materials your club creates. <li data-bbox="602 911 1398 940">+ Use Rotary videos and images of your members in your materials.
Online presence	<ul style="list-style-type: none"> <li data-bbox="602 1010 1446 1077">+ Find a member with the skills and time to create and manage your club website and social media pages. <li data-bbox="602 1108 1279 1138">+ Take the course The Rotary Brand in the Learning Center. <li data-bbox="602 1169 1370 1199">+ Use Rotary videos and images and videos of your own members. <li data-bbox="602 1230 1365 1260">+ Use Rotary's Social Media Toolkit to update your digital presence.
Marketing expertise	<ul style="list-style-type: none"> <li data-bbox="602 1325 1442 1392">+ Find tips in Club Public Image Committee Basics and put members with public relations expertise on the committee. <li data-bbox="602 1423 1442 1491">+ Recruit professionals with marketing expertise using ideas from Finding New Club Members: A Prospective Member Exercise. <li data-bbox="602 1522 1442 1589">+ Refresh your club's social media presence using the Social Media Toolkit in Rotary's Brand Center.

BUSINESS AND OPERATIONS



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

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

COMMENTS



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

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

WHAT'S NEXT?



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

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

NEXT STEPS

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

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

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

Action	Time frame	Person responsible

FEATURED RESOURCES

[Club Planning Assistant](#)

[Membership Assessment Tools](#)

[Membership resources](#)

[Brand Center](#)

[Learning Center](#)





STRENGTHENING YOUR MEMBERSHIP

Creating Your Membership Plan

ABOUT THIS GUIDE



This guide is for club leaders and club membership committees. It explains the process of creating a membership plan and provides strategies and tools you can use to attract and engage new members. It also includes information about sponsoring new clubs and reviews the membership resources that are available from Rotary. As you work through this guide, you will evaluate your club's membership trends, create strategies for attracting new members, and develop ways to make your club meetings more engaging to improve your club's member retention rate. Finally, we've included a worksheet that has concrete steps your club can take to build a plan to strengthen its membership.

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INTRODUCTION

Building membership is Rotary's top internal priority, and every member can make a difference. When you have a strong membership base, your club is better able to serve. We need active, engaged, and enthusiastic members and club leaders who can recognize opportunities for growth and act on them.

Clubs around the world approach membership in very different ways. Recognizing and acting on the unique needs, customs, and changes in your community will enhance your ability to increase your membership.

Creating a membership plan is a way to document your club's vision, goals, and strategies for expanding your membership and keeping your members connected. Be sure to involve all of your members in the creation of your membership plan and consider everyone's ideas. Having contributions from all members will foster enthusiasm and help ensure your plan is well implemented. Once it's created, your plan can serve as a guide to setting your membership goals and tracking your club's progress.

CHAPTER 1 EVALUATING YOUR CLUB



Take the course *Is Your Club Healthy?* in the Learning Center to implement suggested remedies.



When using the member satisfaction survey to evaluate your club:

- Consider using anonymous surveys to ensure candid feedback.
- Be open to suggestions.
- Consider all perspectives.
- Get feedback on your survey's questions before giving it to all club members.
- Be creative and make it fun.

Determining how your club can improve is crucial to keeping current members engaged and active while making your club attractive to prospective members. Taking an objective look at your club — from the perspective of club members and your community — can reveal both its strengths and the areas that need improvement.

You can start your assessment by having your club officers take the [Rotary Club Health Check](#). It's designed to be a quick and easy way to determine what your club is doing well and where you might want to make some changes. Once your club officers have taken the health check, they should discuss their findings and ideas for next steps at your next board meeting.

Then gather your members' feedback about your club. It's essential to involve your members, who are a valuable resource in the continual effort to keep your club fresh and vibrant. You may even wish to ask a trusted person outside of your club, such as an assistant governor or district membership chair, to facilitate your club assessment to encourage candid feedback.

Here are a few ways to get feedback from members:

- Informal discussions, with small or large groups, held in a location other than your usual meeting place

- Face-to-face interviews
- Paper or electronic surveys, such as the member satisfaction survey in [Enhancing the Club Experience](#), found in Membership Assessment Tools
- Focus groups with members, prospective members, or non-Rotarians in your community

It's important that your club be open to making changes based on member feedback. Club evaluation is most effective if you and members of your club begin to make changes soon after you gather feedback. Once you ask for members' opinions, they will be eager to see what changes will be made based on their recommendations. If none is made, your members are not likely to be motivated to participate in club evaluation in the future.

Here are a few questions to consider as you evaluate your club:

- Is your club diverse?
- Is your club's membership balanced across professions?
- Is your club sustainable?
- Why do members stay in your club, and why do members leave?
- Is your club innovative and flexible?
- Does your community have a strong awareness of your club?
- How are you using digital communications to promote your club?
- How does your club appear to a nonmember?



To understand different ways clubs can increase diversity, visit the [Learning Center's membership section](#) and take the course [Building a Diverse Club](#).



Worldwide, **52%** of Rotary club members are between the ages of 50 and 69, and another **22%** are 70 or over. How might you welcome younger members into your club?



71% of members work, while about **26%** are retired. Analyze the demographic composition of your club and target underrepresented groups in your recruitment strategies.

IS YOUR CLUB DIVERSE?

The strongest and most effective clubs reflect the demographics of the communities they serve. That is, they include a representative mix of men and women and different age groups, professions, and ethnic groups. Rotary clubs that bring together diverse perspectives address the needs of their communities more creatively. Diverse clubs are also seen by their communities as more credible, and they draw upon a wider range of skills, and greater volunteer resources, leadership prospects, and fundraising potential.

Use the assessment in [Diversifying Your Club](#) to gauge your club's diversity. It will prompt you to consider these questions:

- What is the gender balance of your club?
- How many of your club's members are under the age of 40?
- Is the ethnic makeup of your community represented in your club?
- Do your club's leaders reflect the diversity that one would expect based on its members?
- Are different perspectives welcomed?

DO YOUR CLUB'S MEMBERS REPRESENT A GOOD BALANCE OF PROFESSIONS?

Understanding the professional breakdown of your members can help you create a balanced membership base that reflects the careers in your community. The Rotary Code of Policies requires clubs to include members from a wide variety of professions. To assess your club's professional diversity and make the most of your members' expertise, complete the classification assessment in [Representing Your Community's Professions](#). This assessment reveals professions and skills that are present in your community but missing from your club.

Does your club have any members who work in software engineering or web development? What about public relations or fund development? Don't forget about entrepreneurs, owners of home-based businesses, younger professionals, bloggers, and community service leaders. Clubs that include members with varied professions gain a cross-section of expertise, perspectives, and skills that increase their capacity to serve their communities. Get to know your members' unique skill sets and involve them in your club's committees and projects. Members who have a role to play in the club are more engaged and more likely to stay in it.



Find ideas for introducing new members to your club by taking the course *Kick-start Your New Member Orientation* in the membership section of the Learning Center.

For more ideas about engaging current members, take the course *Best Practices for Engaging Members* in the membership section of the Learning Center.

Learn more by taking the course *Practicing Flexibility and Innovation on Rotary's Learning Center* or by visiting rotary.org/flexibility.



Use membership reports to make more strategic decisions about where to focus your efforts. *Understanding Membership Reports* can help you get started.

IS YOUR CLUB SUSTAINABLE?

Did you know that even if your club membership numbers are constant from year to year, you could still have a retention problem? When a club continually gains and loses members, that makes it difficult for the club to operate effectively, carry out successful projects, and attract potential members.

To get a true picture of the state of your club's membership, look at information from the past three to five years. You can see membership patterns by going to [Rotary Club Central](#) to look at data and reports from several years.

You can learn more by reading [Improving Your Member Retention](#) and completing the retention assessment and analysis. The assessment helps you look at your club's membership changes within a specific time frame and recognize any significant turnover.

WHY DO MEMBERS STAY IN YOUR CLUB, AND WHY DO MEMBERS LEAVE?

Knowing how long members tend to stay in your club and [understanding why members leave](#) can help you focus on specific areas in your membership plan. The assessment and analysis in [Improving Your Member Retention](#) groups members according to the length of their membership. For example, you might discover that the majority of your club's former members left within their first two years. With this in mind, you can focus on keeping newer members by encouraging

them to become involved in club programs and projects.

After a club leader has completed the initial assessment, the membership committee should evaluate the results and discuss them at a club meeting or assembly. Ask members to suggest specific strategies and activities to keep members engaged and involved.

IS YOUR CLUB INNOVATIVE AND FLEXIBLE?

In a changing world, your club's success depends on its ability to adapt and evolve. Surveys and focus groups consistently show that prospective members and younger members are more likely to stay with Rotary if they believe that their club is willing to accommodate their interests, as well as their work, family, and personal needs. If you want to attract prospective members to your club, you'll need to make your club relevant to them.

Clubs now have greater flexibility in meeting frequency and format, attendance, and membership types. Consider varying meeting times and locations, loosening attendance rules, reducing fees for new or younger members, varying your service projects, and allowing for different kinds of membership. You'll find that being in a more accommodating club will make members more loyal to and enthusiastic about Rotary and the club.

Use the Event Planning Guide in the Brand Center's promotional resources to plan your next public event. Give out prospective member brochures to explain what Rotary is, and customize a club brochure to introduce your club. You can also show a presentation that helps nonmembers Discover Rotary.



See the [Social Media](#) page on [Rotary.org](#) for a list of Rotary-related social media channels where you can share your latest stories and join the conversation.

DOES YOUR COMMUNITY HAVE A STRONG AWARENESS OF YOUR CLUB?

Building a public image is vital to any organization's success. Although global awareness of Rotary's name and emblem are relatively high, the public doesn't have a deep understanding of Rotary and the contributions we make to communities around the world. Building this understanding and recognition starts at the club level.

What can you do to promote what Rotary does in your community? Assessing your club's promotional materials is a good place to start. Do they depict Rotarians as people of action in the community? Do they demonstrate the value of membership and explain how the community and prospective members can get involved? Are your messages consistent? You can find a wealth of resources to help you get started, including messaging guidelines, on Rotary's [Brand Center](#).

Next, ask your members to engage with the community and tell Rotary's story. You can do that through one-on-one conversations, events, news stories, your website, or social media. Make sure your audience knows how it can learn more or become further engaged. Get the community excited about your club and Rotary, and make sure the experience your club offers matches the expectations you've created.

Research indicates that people are more likely to give time and money to an organization with a proven record of tangible results. Use Rotary's resources to raise awareness of your

club and the work it does in your community. Visit the [Brand Center](#) to find customizable materials, including a club brochure and inserts for youth programs. Post your projects in [Rotary Showcase](#) to publicize the good work clubs like yours do locally and globally.

HOW ARE YOU USING DIGITAL COMMUNICATIONS TO PROMOTE YOUR CLUB?

Does your club have a website? A Facebook page? Do you update them regularly? Do you tweet about your club's special events and signature projects? Are you interacting online with Rotary members around the world, as well as people and organizations that share your interests? Have you joined any conversations on LinkedIn? Having an online presence increases your club's visibility and fosters a deeper understanding of its impact on your community. Make your club website appealing to nonmembers, not just members. Consider having a public-facing section that shows club contact information and is refreshing, free of Rotary jargon, and easy to navigate.

Be creative, consistent, professional, and resourceful with your online communications. Videos, podcasts, and blogs allow you to share valuable information about Rotary and your club. Check [Rotary.org](#), [The Rotarian](#), and Rotary's blog, [Rotary Voices](#), regularly for content you can use to update your club's website and newsletters.

The power of social media lies in its ability to reach a broad audience. Sharing an inspiring post can spark others to do the same. Find someone in your community who is adept at using



Tell stories from the Rotary community on our [Instagram account](#).



Put a link to Rotary's [Join page](#) on your website for people interested in membership.

these communication tools and can help your club with your social media pages. Here are some of the popular digital communication platforms that are being used by Rotary members around the world to increase visibility and engagement.

Facebook

See what's happening around the world on Rotary's official Facebook page, facebook.com/rotary. You'll find links to Rotary news stories, events, and videos. Your club can use Facebook to find potential members, invite community members to fundraisers, and show the community your projects. You can also link to donation pages, connect with other organizations, and highlight the work of your club and Rotary around the world. With Facebook, if you see something you like, you can add your comment and share it with your contacts in a matter of seconds.

LinkedIn

Network with other Rotarians and friends of Rotary on LinkedIn, the world's largest professional network. Rotarians can join groups in their region or around the world to share ideas and get their Rotary questions answered. Join [Rotary International's official LinkedIn group](#) to communicate with over 64,000 members.

Twitter

Keep in touch with other Rotarians and friends of Rotary at twitter.com/rotary. Take part in Rotary events like the international convention while engaging in dialogue with other attendees. You can also use Twitter

to maintain contact with your local media and link to articles about your projects in your community.

YouTube

Rotary has a number of videos on its own YouTube channel, www.youtube.com/rotaryinternational. Share them or link to them on your club's website or your personal website, on social media outlets, and in newsletters. If a member of your club has the ability to make videos or if you can hire a video professional, you may want to post videos about your own club so that potential members and donors can learn about what you do.

HOW DOES YOUR CLUB APPEAR TO A NONMEMBER?

Club image

Is it easy for a visitor to find basic information about your club, including your meetings and projects? Ask a friend or family member to try to locate the following information:

- What does your club do?
- How often does it meet?
- Where will the next meeting be, and how long will it last?
- Should a visitor contact someone in the club before visiting?
- Is there a cost to the visitor for attending?
- What will the meeting be like?
- What does your club do besides holding meetings?

If it is not easy to find this information on your Facebook page, on your website, or through Rotary's [Club Finder](#), you may be missing the chance to connect with prospective members.



To learn more, take the Online Membership Leads course in the Learning Center.

Club experience

Often, our strong brand attracts interested members of the community. But when they visit a club, the experience doesn't match their expectation. Review what happens when your club meets to make sure it is a welcoming and fun experience:

- Is someone responsible for welcoming members and guests to meetings and events?
- Are your club's meetings and events well organized and run professionally?
- Are your club meetings interesting, insightful, and relevant?
- Is there sufficient variety in how you meet and what you do when you meet?
- Do your club's practices accommodate member needs and interests?
- Do you have regular social events?

Your club may even consider asking members to attend other clubs or inviting visitors to come and give you their honest feedback. This will give you an unbiased perspective.

Some nonmembers express their interest in Rotary by finding Rotary.org and clicking or tapping "JOIN."

These candidates for membership are assigned to a district as a membership lead. Your district leaders may assign these leads to your club leaders to review. If you get an email alert, follow the instructions to connect to these interested community members.

Service projects

Research consistently shows that members join and stay to make a difference in their community and to make connections. Having a strong project will attract new members and engage current ones. Review your service projects. Are they inspiring

and enjoyable for everyone involved? Do they make a significant impact?

- Does your club have a signature service project that all members are involved in?
- Does your club invite nonmembers (friends, family, colleagues, Rotary alumni, Rotaractors, and other community members) to participate in its service projects and learn more about your club?
- Do your service projects address a current need in your community?
- Do they draw upon members' talents and expertise?
- Do your club members meet the people who benefit from their service?

Be sure to follow up with nonmembers who attend your club events and service projects to learn more about them and their interests. Invite them to your club meeting to get to know your club. They may be a good fit for your club. Even if they aren't, creating a positive experience for them will help Rotary's public image. To learn more, see [Creating a Positive Experience for Prospective Members](#).

Gathering nonmember feedback

An effective way to get helpful suggestions on making your club even better is to talk to individuals or groups face-to-face. Focus groups, for example, can also help you meet non-

Rotarian members of your community and introduce them to Rotary. You could hire an outside professional to conduct the focus group to prevent bias. Some clubs ask an agency to donate this service. If having an outside professional conduct a focus group isn't possible, have facilitators do their best to be open-minded and objective.



To learn more about making your club more attractive and finding new members, take the Strategies for Attracting New Members course in the Learning Center.

STEP 1: INVITE PARTICIPANTS

List community members you'd like to invite. Aim for a diverse group of women and men of varying ages and professions. Invite prospective members, Rotaractors, [Rotary alumni](#), and others who know a little about Rotary. Tell them the purpose of your focus group and how valuable their opinions are to your efforts to shape projects and activities.

STEP 2: CREATE THE ENVIRONMENT

Work to create an environment where people feel free to speak candidly. The question-and-answer session should be relaxed, more like a discussion among friends than a formal survey. Spend a few minutes introducing yourself, recounting how you got involved in Rotary, and explaining why you've been looking forward to the focus group.

Ask the participants to introduce themselves, mentioning anything they would like, such as their profession, how long they've lived in the community, or whether they're involved in any professional or service groups.

STEP 3: HAVE THE CONVERSATION

Have an agenda, even if it has just 10 questions. It's important that questions not lead participants to specific responses, and the facilitator must remain neutral. Think of questions that cannot be answered with a yes or a no:

- What attracted you to this community?
- If you had one extra hour per day, how would you spend it?
- What problems do you see in our community? What could community members do to address them?

- If you could help any part of the world, in any way you liked, what would you do?
- What are your impressions of Rotary?
- What positive and negative perceptions of Rotary do others have?

Give everyone a chance to speak, and try not to let a few people dominate the conversation. Tell participants how helpful it is to your club to get many opinions. Call on people who are especially quiet if they look like they want to comment, but take care not to make anyone feel uncomfortable.

STEP 4: SHARE THE RESULTS

Prepare your top five findings from the discussion. You might present this information during a club meeting, conduct a brainstorming session, and provide your club with a one-page summary for reference.

When you present the findings, you can discuss the focus group's ideas along with members' ideas. Show members that you value their thoughts and opinions, and that the discussion will result in change. This is the starting point for your club membership plan.

CHAPTER 2

CREATING A VISION FOR YOUR CLUB



Take your club through the club visioning process in a fun and new location to foster innovation. Choose a location that is comfortable, spacious, and convenient for members. Consider asking a planning professional to assist you.

After you determine the current state of your club by completing the evaluations described in chapter 1, your next step is to discuss and formulate a vision for your club. Creating a vision means deciding what you want your club to be like in the immediate future and in three to five years. Taking the time to create a vision can make your club strong, active, and attractive to new members. Involving club members in this process gives them a sense of ownership in their club, an understanding of the club's goals for the future, and motivation to work together to achieve those goals.

Consider these questions:

- What is your club good at? How can you capitalize on that?
- What are your club's areas of weakness?
- What would you like your club to be known for?
- Based on your club's challenges and strengths, what are your strategic priorities?
- What changes can be made right away?

- What short-term and long-term goals can help you achieve your vision?
- What plans can you put in place to help you reach those goals?
- Who will work together to monitor progress and make recommendations as needed?

Once you have agreed on an ideal vision for your club, the strategic planning process will determine how you can reach that vision. The [Strategic Planning Guide](#) can help your club articulate or modify its vision. It will also help you in setting long-term and short-term goals. As soon as you have a timeline and people assigned to the tasks on your action plan, you can set your plan into motion.

CHAPTER 3

ATTRACTING NEW MEMBERS



The top reason that people join a Rotary club is to make a positive impact in their community through service.



Partner with local organizations like young professional networks or professional women's organizations to identify prospective members.

Your club may have prospective members that are waiting to hear from you. Many people express interest in Rotary online and are assigned to clubs for follow-up. Club leaders get alerts when a new lead is assigned to the club. [Learn How to Manage Membership Leads.](#)

Every club needs new members in order to be vibrant and active. New members introduce new ideas, bring fresh perspectives, and extend your club's reach in the community.

After completing assessments from chapter 1 and creating a vision for the future of your club in chapter 2, the next step is to develop strategies for addressing the most critical elements identified by your assessment. For many, one of those will be attracting new members to the club. Draw on your club's strengths and recognize the challenges you identified through the diversity and classification assessments as you think about strategies for attracting new members.

WHO ARE YOUR PROSPECTIVE MEMBERS?

Ideal prospective members are people who embody Rotary's values, who want to make a difference locally, and who have a good reputation in the community. In addition to friends and co-workers, consider nonmember volunteers who have participated in your service projects, those who have indicated an interest in your club but never joined, and former members who've left your club or another club in the area. Members often leave for a short time but will return if invited. Consider young professionals who have participated in Rotary's

programs, such as former Group Study Exchange or vocational training team members, Ambassadorial Scholars, Rotary Peace Fellows, Rotary Friendship Exchange participants, and Rotaractors, as well as the parents and grandparents of Interactors, RYLA participants, and Rotary Youth Exchange students, and youth exchange host families.

Once a year, ask club members to complete the exercise in [Finding New Club Members](#). This simple activity asks members to think about people they know in the community who might be good club members.

Use the results to talk with members about your club's culture and whether these prospective members would be a good fit. Do they work in the area? Is the club's meeting time convenient for them? Do they exhibit the characteristics of leaders? Do they differ from current club members in ways that would bring some diversity to your membership? A thoughtful selection process can mean the difference between inducting a short-term, inactive member and finding a lifelong, committed, engaged Rotarian.

Remember, even if the prospective members you identify don't join, it's worthwhile to engage them as volunteers, donors, or simply friends of your club and [create a positive Rotary](#) experience for them.

If you find a promising person but learn that your meeting time or location, for example, is not a good fit, refer him or her to another Rotary club.



Invite a prospective member to a club service project or event, so that she or he can see that your club is active and involved in the community. Assign a member to contact the prospective member after the event. Involving prospective members in community service events is especially effective for attracting younger people.

HOW DO YOU APPROACH A PROSPECTIVE MEMBER?

Potential members may be your friends, business acquaintances, Rotaractors, or Rotary alumni, including former Youth Exchange participants. They could also be family members or even someone you've just met.

Keep your message simple. Don't try to tell prospective members everything there is to know about Rotary before they've attended a club meeting or taken part in a service project. Try starting the conversation by explaining how Rotary has had a meaningful impact on your life, career, or friendships. Although facts and figures may be useful, personal experiences and stories connect people on an emotional level. After you've told your story, ask them what they would look for in a Rotary club. They may be most interested in making new friends, taking action on a specific community issue, or developing professional networks. When you know what they're looking for, you can show how your Rotary club can fill that need.

Think about what kind of event your prospective members would enjoy. Some people might be more comfortable attending a club meeting or social event, while others might prefer to learn about Rotary by working on a service project or participating in a fundraiser. Use this guide for tips on [Creating a Positive Experience for Prospective Members](#).

HOW DO YOU COMMUNICATE THE BENEFITS OF JOINING YOUR CLUB?

In talking to prospective members, do you consider their interests and needs when you explain the benefits of Rotary membership? Here are some popular benefits that Rotary members worldwide have associated with being a part of a Rotary club:

- Making a positive impact in one's community through service projects
- Establishing business connections, lasting friendships, and mentor relationships
- Developing professional skills, such as event planning, public speaking, and fundraising
- Including family members in service projects and events and getting children involved in youth programs in the community or abroad
- Creating a global network of friends, especially when traveling
- Getting discounts on a variety of services through the Rotary Global Rewards program

The following scenarios show how you can use a prospective member's interests as a starting point for introducing Rotary.



Make a list of the benefits of Rotary membership, and discuss them with your members. Develop sample messages that members can adapt when talking with potential members. Incorporate these messages into your [club brochure](#) or a presentation that helps nonmembers [Discover Rotary](#).

Community service

A member of your community is regularly featured in the news for his community service activities.

Invite him and other volunteers he works with to join your next service project. They'll bring their ideas and experience, the extra help will allow you to make a greater difference, and the people you meet may be good prospective members.

Friendship and connections

Your colleague has recently retired and is feeling a bit isolated. Explain to her how membership in Rotary has kept you active in your community, connected you with business leaders, taught you about topics you wouldn't encounter elsewhere, and resulted in lasting friendships. Invite her to your club's next social event, community service activity, or meeting.

Family involvement

Your neighbor is looking for ways to involve his children in activities that have a positive impact. Tell him how Rotary members involve their families in club activities and explain how Rotary supports students through scholarships and opportunities to travel abroad for cultural exchanges.

International focus

A member of your community wants to increase her charitable contributions and participate in some international service. Tell her how Rotary clubs around the world connect with each other to provide clean water, health care, education, and more.

HOW OPEN SHOULD YOU BE WITH PROSPECTIVE MEMBERS?

Studies have shown that members who join a club without some knowledge of Rotary are more likely to leave within a year or two. It's important to talk to people about what it's like to be a member of your club before they join. Hold information sessions to give prospective members an opportunity to learn about your club's activities and the benefits of membership. The [Discover Rotary PowerPoint presentation](#) was created for this purpose. Use it and the [People of Action videos](#) to inspire your prospective members at a meeting with a large number of guests or an event where prospective members will be present. Distribute the [prospective member brochure](#) and a [club brochure](#) if you have one.

Ask several club members to share their experiences to give prospective members a sense of your club's culture. Don't assume that prospective members who are Rotaractors, peace fellows, or Rotary alumni know everything about Rotary just because they are part of the family of Rotary. They may not know very much about your club, its culture, or its signature projects. Be sure to tell them about dues, meeting times, how new members are sponsored, and how they can expect to be involved. For ideas about what to cover with new members rather than prospective members, see [Introducing New Members to Rotary: An Orientation Guide](#).



Post an upcoming club service project or social activity as a Facebook event. This is a good way to connect with people in your community who are not familiar with Rotary and may be interested in getting involved.

HOW WOULD YOU REFER PROSPECTIVE MEMBERS?

If you know someone who is qualified to be a great Rotarian but unable to join your club, [refer them](#) to another club. If the club is in your area, you may wish to take the prospective member to the meeting to make a personal introduction. If you're unsure which club would be the best fit and the prospective member lives in your district, contact your district membership chair or district governor for assistance.

You can also refer a potential member at rotary.org/membershipreferral, and Rotary International will facilitate the connection. Your district governor or district membership chair may also direct referrals from other Rotary members, Rotarian relocation assistance requests, or membership inquiries received through Rotary.org to your club. Club leaders should check these leads often, because prospective members may be waiting to hear from them. Learn [How to Manage Membership Leads](#).

HOW CAN YOUR CLUB DIVERSIFY ITS MEMBERSHIP?

In chapter 1, you learned why having a diverse club is important, and you completed a [membership diversity assessment](#). You can find demographic data for Rotary in your region, including gender and age, by checking the reports on Rotary Club Central and the Club Administration area of My Rotary. Here are some tips for attracting young professionals and women, two types of members that are underrepresented in clubs worldwide.



To learn more about attracting and finding new and diverse members, visit the [Learning Center](#) and take the courses [Strategies for Attracting New Members and Building a Diverse Club](#).

Ten ideas for attracting younger professionals

Adding younger members is essential to your club's future. But younger professionals often have hectic schedules, family obligations, and financial limitations that make it difficult for them to commit to Rotary. Make club membership more attractive and more feasible for younger members:

1. Waive or reduce fees for a period.
2. Create a satellite club that meets at a different time or has a format that's more convenient for those with young families. Consider meeting on a weekend or online.
3. Reduce meal expenses or make meals optional. Consider bringing snacks to a meeting, organizing a potluck, or having everyone take turns bringing the food or beverages.
4. Create social and networking activities that are interesting and convenient for younger professionals.
5. Invite groups of younger people to join at the same time to make them feel more comfortable, and invite Rotaractors to become dual members.
6. Relax your club's attendance rules. Perfect attendance is typically not attainable for today's professionals. This may require some changes to your club's policies. To explore this option, see the [Start Guide for Flexible Meetings and Attendance](#).
7. Highlight opportunities to get involved in local service.
8. Assign a veteran Rotarian to serve as a mentor to make a new young member feel welcome. For information on mentoring,

see [Introducing New Members to Rotary: An Orientation Guide](#).

9. Get them involved. Young professionals are creative and eager to generate new ideas for solving persistent problems. [Connect for Good](#) presents a number of ways members can connect and get involved.
10. Offer variety. Talk about all the ways new members can participate in Rotary. Find out about their abilities and interests, and find ways to put them to use in your club's work.

For more ideas for accommodating younger members, see the [Engaging Younger Professionals toolkit](#) at [Rotary.org](#) and go to [rotary.org/flexibility](#).

Women in Rotary

According to a 2015 demographic survey of Rotary, only 22 percent of Rotarians worldwide are women. In many regions, the percentage is much lower. Rotary research indicates that women and men join Rotary for the same reasons: to make a difference in their communities and to make personal connections. If fewer than 50 percent of your club's members are women, increasing that number will bring a different perspective to your club, make it better reflect the demographics of your community, and expand the power and scope of your service projects.

Younger professionals and women aren't the only two groups to target. Recent retirees may be looking for ways to stay connected to professionals in the community, and could share their skills and expertise with your club.

CHAPTER 4

ENGAGING YOUR CLUB'S MEMBERS



The top reason that members stay with Rotary is the valuable friendships and connections they've made.



Encourage members to explore **Connect for Good** to learn about the many ways they can get involved with Rotary. Whether they lead a hands-on service project, host a Youth Exchange student, or meet with other Rotary members at the Rotary International Convention, they'll learn how to get the most out of their membership.

Attracting new members to your club is important for growth and new perspectives, but the key to a strong membership is keeping current members. Whether your club is rich in new members, in established members, or both, your membership plan should seek to fully engage all of them. Engaged members participate in club activities, meetings, events, projects, and club leadership. They also feel a strong attachment to their club because they enjoy the friendships and fellowship that come with being a Rotarian. They are motivated to put extra effort into club activities and projects and are proud to tell others about the impressive work their club is doing.

ENGAGING CURRENT MEMBERS

What if you thought of your members as your best customers? What keeps them coming back? Work hard to deliver an experience that keeps them engaged and excited about Rotary. Consider relaxing attendance policies or changing meeting formats if that's what members want. It is well known that engaged members are more likely to stay with your club, so be sure to show your appreciation regularly and make sure that they have a variety of options for getting involved and staying active in your club:

- Recognize their achievements and celebratory occasions, such as club membership milestones, work promotions, and birthdays.
- Develop a formalized mentoring program for involved members to support less active or new members.
- Reach out to members with low attendance to understand why they aren't coming and help them re-engage.
- Get regular feedback from members to confirm that they are experiencing the benefits they were promised when they joined.
- Encourage them to serve on committees that suit their skills or interests.
- Give members a clear sense of your club's long-range goals and mission.
- Invite them to attend a district conference or seminar.
- Poll members on their interests and incorporate these topics or activities into club meetings or events.
- Feature photographs of your members at recent club projects and events on your club website and Facebook page and in newsletters to recognize their contributions.
- Update members regularly on progress toward club goals as a way to build loyalty, pride, and an understanding of the need for long-term involvement.



53% of terminated members report that their club leaders do not consistently seek input from members.



Many terminated members report that they did not receive sufficient information about their clubs.

- Use the member satisfaction survey in [Enhancing the Club Experience](#) to gauge what's working and what's not.

Everyone's opinion counts

Interviewing club members — especially those who are leaving — can yield information that's useful for your retention efforts. Ask departing members to complete the exit survey in [Understanding Why Members Leave](#) to help your club prevent such losses in the future. Often, a personal conversation between the exiting member and a member she or he trusts can bring out additional information that is beneficial for club planning.

If resigning members are relocating or leaving your club because of schedule conflicts but would like to continue being Rotarians, send them the link to [rejoin or change clubs](#) or [refer them](#) to other clubs that might be able to accommodate them.

The [member satisfaction survey](#) is designed to tell you what club members like most about your club and what they believe could be improved. Ask members to complete the survey, and share the results at a future club meeting. Discuss the findings with your club members, talk with them about changes that can be made, and involve them in implementing those changes.

Communicate with your club

Research shows that keeping members informed and up-to-date can increase a club's overall retention rate. Establish a communication plan to determine what you want to communicate with members and

how. Club e-newsletters, websites, and social media pages are useful communication tools. Recognize that different members use different communication tools, and try to offer information using more than one method. Members might enjoy learning about:

- Club information — projects, activities, news, and events
- Club financial reports
- International service opportunities
- Rotary's online tools and resources (and how members can benefit from them)
- Rotary news highlights

Regularly communicate to your club members about:

- Opportunities to
 - Take on leadership roles
 - Attend club assemblies and district-level seminars
 - Participate in multidistrict meetings
 - Get involved in club and district projects and activities
- Rotary programs, projects, and activities
- Special Rotary events, including the Rotary International Convention and district conference
- Strategies for attracting new members
- The goals and initiatives of the club and district committees
- Progress toward membership and other goals
- Awards and recognition programs
- Sponsorship of new Rotary clubs



See how a fictional club engages its members, including new ones, by taking the courses [Best Practices for Engaging Members](#) and [Kick-start Your New Member Orientation](#), found in the [Learning Center](#).

ORIENTING NEW MEMBERS

The moment a person becomes a Rotarian is special for both the member and the club. Whether you choose to mark this event with a special ceremony or induct new members at a club meeting, make sure you acknowledge and celebrate their involvement in Rotary. Invite the inductee's family, and encourage all club members to participate in welcoming this new member of your Rotary family. Give them copies of [Rotary Basics](#) and [Connect for Good](#) (sold together in the New Member Welcome Kit through shop.rotary.org), as well as a member certificate (template available in the [Brand Center](#)).

Organize a formalized orientation program shortly after induction. Give new members an understanding of the benefits of membership in your club and the opportunities for service, both in your community and internationally. Include an overview of your club's recent accomplishments and upcoming projects and activities, and ask how they would like to be involved. Read [Introducing New Members to Rotary: An Orientation Guide](#) for more ideas.

NEW MEMBER INVOLVEMENT

Research shows that members become more committed and connected to their fellow members, their club, and the organization as they become more involved in Rotary activities. Ask new members what projects or activities interest them, and give them an active role so they immediately feel a sense of connection to your club. Don't assume that a new

member will be interested in a role that's related to his or her profession. For example, an accountant may not want to keep the books for the club just because that's her area of expertise. She may be looking for a different experience. [Connect for Good](#) showcases a variety of ways a member can get involved and connected through Rotary. Be careful not to overwhelm them with too much responsibility right away, though. Talk to them to see how involved they would like to be.

Meaningful service projects

A key reason people are drawn to Rotary membership is the promise of work on meaningful service projects in their communities and other parts of the world. Clubs that conduct multiple projects can offer more opportunities for involvement, making members feel that they are contributing to an important effort.

Rotary Fellowships and Rotarian Action Groups

New club members might be interested in joining a Rotary Fellowship or Rotarian Action Group, where they can have fun while:

- Sharing common interests or hobbies
- Working with others in their profession to make a difference
- Making friends around the world
- Exploring new opportunities for service

Learn more about [Rotary Fellowships](#) and [Rotarian Action Groups](#) on [My Rotary](#).



Of terminated members, 48% did not feel comfortable sharing their concerns with club leaders.



To learn more about their role, club membership committee chairs and members should take the Club Membership Committee Basics course, as well as the membership courses, in the [Learning Center](#).

Special Rotary events

In addition to weekly club meetings, invite new members to club, district, and international events:

- Club assemblies
- District conferences
- District training events
- District membership, public image, and Rotary Foundation seminars
- Rotary institutes
- Rotary International Conventions

Get to know your members

Rotarians value the relationships that are formed within their clubs. This is one of the primary reasons that people stay in Rotary. Encourage members to learn about their fellow members.

Make an effort to understand your members' backgrounds and interests:

- Ask members which upcoming project or activity they are most looking forward to.
- Feature a different member in your each of your newsletters.
- Introduce and interview a different member at each meeting.
- Involve families in meetings, social activities, and service projects.
- Ask members to take turns sharing their Rotary moments at your weekly meetings.

Listen to your members and their concerns. Review the member satisfaction survey results to be sure that you are actively seeking out their opinions and that their voices are being heard. Take prompt action to address the concerns of your members so that their experience in your club is positive.

YOUR CLUB MEMBERSHIP COMMITTEE

In order to accomplish all of your membership goals, you'll need a strong team to develop and implement your membership plan. Establishing a club membership committee will allow you to succeed at executing the strategies outlined in your plan — and involve club members in the endeavor. Club membership committee responsibilities often include:

- Setting club membership goals for the coming year
- Checking and managing online membership leads and following up with the interested candidates
- Leading new member orientation
- Informing members about the importance of attracting and engaging members
- Developing an action plan to improve member satisfaction that includes surveying members and then responding to their feedback by initiating changes
- Conducting club assessments to see that membership development and retention efforts are successful
- Working with the public relations committee to create an image of your club that is attractive to prospective and current members, as well as the community in general
- Sponsoring newly organized clubs in the district, if applicable (see [Starting a Rotary Club](#))

CHAPTER 5

MENTORING NEW CLUBS



Your club can play a vital role in new club development by sponsoring and mentoring a new club. Before undertaking this responsibility, discuss the process with your members and make sure they are willing to participate. To learn more about developing new clubs, see [Starting a Rotary Club](#).

SPONSOR CLUB QUALIFICATIONS

Although a new club isn't required to have a sponsor club, Rotary strongly recommends it. In selecting a sponsor club, the district governor and district membership team look for a club that:

- Has been chartered for at least three years
- Has voted to mentor the new club for at least one year after its admission into Rotary
- Is in good financial standing with Rotary
- Has at least 20 active members (if more than one club acts as a sponsor, this applies to only one of them)
- Maintains a well-rounded program of Rotary service

A new club's success depends on how well the club is organized and how well it operates in its first few months. After a club receives its charter, the sponsor club offers guidance for one to two years.

SPONSOR CLUB RESPONSIBILITIES

A sponsor club's president joins the new club adviser in attending the new club's first regular board meeting, but there's enough to do to support a new club that every member of the sponsor club can get involved. A sponsor club:

- Assists the district governor and new club adviser in planning and organizing the administrative processes of the new club
- Serves as an adviser to the club's officers and reports to the district governor as requested during the club's first year
- Familiarizes the new club with Rotary's policies and procedures
- Organizes joint fundraising activities
- Assists the new club in planning programs and projects during its first year

Research indicates that new clubs' biggest membership losses, and the highest number of club terminations, occur during the second year. A new club that has the strong support of a sponsor club well into its second year has a greater chance of becoming strong, self-sufficient, and productive.

To learn more about being a sponsor club, see [Sponsor Clubs](#).

THE MENTORING RELATIONSHIP

Sponsor clubs can establish strong, healthy mentoring relationships in several ways.

Set goals with the new club

Honestly examine the challenges and weaknesses that could impede the new club. Once you do, you can help it establish goals that will lead it to success.

Provide structure

Set up regular meetings, complete with agendas, and make sure that each meeting moves the new club toward its goals.

Establish regular communication

Plan to communicate or meet with the new club so you can advise and guide it in its early stages.

NEW CLUB REQUIREMENTS

Rotary has also set standards for new clubs:

- A new club must have a minimum of 20 charter members, unless there is sufficient reason for the Board to waive this requirement.
- At least 50 percent of the charter members must reside in the community in which the club is being established.

CHAPTER 6

SUPPORTING YOUR CLUB: ROTARY RESOURCES AND TOOLS



ROTARY MEMBERS AND STAFF

The following Rotary members and staff members can answer questions and advise your club on formulating an effective membership plan. Find contact information for Rotary staff and your district's leaders on [Rotary.org](https://www.rotary.org) or in the Official Directory.

REGIONAL LEADERS

[Rotary coordinators](#) serve as a resource for districts and clubs and are knowledgeable about all aspects of Rotary, including best practices and innovative strategies for attracting and keeping members, regional membership initiatives, and the priorities and goals of the Rotary strategic plan.

[Rotary public image coordinators](#) can offer guidance and resources for enhancing Rotary's public image in a way that will support membership in your club.

[Regional Rotary Foundation coordinators](#) serve as a resource on all Foundation-related topics, including grants and grant management, fundraising, and programs such as PolioPlus and Rotary Peace Centers.

[Endowment/major gifts advisers](#) work with regional and district leaders to develop plans for cultivating and soliciting major gifts and facilitate events that engage current Foundation supporters and develop prospective ones.

DISTRICT MEMBERSHIP COMMITTEE

The district membership committee identifies, promotes, and implements membership development strategies for the district. The committee chair acts as a liaison between the governor, the Rotary coordinator, RI, and the clubs in the district on membership development issues, and also assigns online membership leads to your club.

Your assistant governor or district governor has contact information for this committee. If your district doesn't have a committee focused on membership, suggest that one be established.

ASSISTANT GOVERNOR

Assistant governors can work closely with your club to make it more vibrant and help it to attract and retain members. Contact your district governor if you don't know who your assistant governor is.



Join the Membership Best Practices discussion group to swap ideas and connect with other clubs.

Tell the district committee and your assistant governor about your club's membership goals and successful initiatives. It is just as important for the district to learn about new and effective club-level strategies and tools as it is for you to know about the support and assistance that the district committee can provide you.

CLUB AND DISTRICT SUPPORT REPRESENTATIVES

Every club has a Club and District Support representative who can answer questions about:

- The RI Constitution and Bylaws, Rotary Code of Policies, Manual of Procedure, and other RI policies
- Rotary International and the Secretariat
- Rotary Club Central

Find your club's representative at rotary.org/representatives.

OTHER SECRETARIAT STAFF

Rotary International's Secretariat includes RI World Headquarters in Evanston, Illinois, USA, and several international offices. Staff members can assist you with questions or requests related to membership. Contact them at rotarysupportcenter@rotary.org.

MY ROTARY

Get the latest news, announcements, and resources on My Rotary, which also offers:

- Membership resources and publications at rotary.org/membership
- **Member Center** (for links to refer members to another club, change clubs, express interest in joining, or use Rotary Global Rewards)
- Publications and other Rotary items available for purchase at shop.rotary.org (where you can purchase new member welcome kits, printed publications, and more)
- **Webinars**
- **Brand Center** (where you can create your own club brochure, event flier, and more)
- **Club Finder**
- Contact information for your **Club and District Support representative**
- **Membership Best Practices discussion group**



Encourage club members to subscribe to Membership Minute, our email newsletter that features membership development strategies, resources, club success stories and member spotlights. Subscribe at rotary.org/newsletters.

Rotary Club Central

Rotary Club Central is an online tool that club leaders use to set and track goals and activities across several key areas, including membership initiatives, service activities, and Rotary Foundation giving. By using Rotary Club Central as a planning tool and recording your club goals, progress, and achievements, you can provide information to help future leaders make informed decisions. By tracking your club's service activity, you'll also play an important role in helping RI record and measure the impact Rotarians are making worldwide.

Club leaders are encouraged to sign in to My Rotary and enter their goals in Rotary Club Central so that both club members and the district governor and assistant governor can see their progress.

Rotary Ideas

Crowdsourcing is a powerful digital strategy that supports Rotary's good work around the world. Rotary's own crowdsourcing platform, [Rotary Ideas](#), is designed to help Rotary and Rotaract clubs find the resources they need for projects. Clubs can post their projects or ideas and ask for partners, volunteers, funding, or other support.

Rotary Showcase

[Rotary Showcase](#) is a platform where you can let people know what Rotary is doing in your community by spreading the word through social media. It allows members of the Rotary family to post information on their club or district service — including a description, photos, and video — and publicize it through Facebook and Twitter.

The Learning Center

Take an online course through the Learning Center at learn.rotary.org. There are many courses you can take or recommend to your club members, including role-based courses. You can create a user profile, track your progress through courses, and print certificates for courses you've completed. Each course also has its own online community where registrants can interact with one another and with course moderators.

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.

QUESTIONS?

If you have questions, comments, or suggestions about this publication, send them to membershipdevelopment@rotary.org.

ROTARY INTERNATIONAL

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Rotary



SUPPLEMENTAL RESOURCES

MODULE A-4

*Understanding and Supporting
Our Rotary Foundation*

ROTARY'S AREAS OF FOCUS





PEACEBUILDING AND CONFLICT PREVENTION

More than 79.5 million people fled war, persecution, and conflict in 2019, according to the United Nations — the highest number the organization had ever recorded. Although the solutions that will end violent conflict are complex, Rotary believes that when groups of dedicated people work to create peace in their communities, their efforts can have a global effect.

BUILDING PEACE

Peace has a unique status in Rotary. We approach peace not as an abstract concept, but as a living, dynamic expression of human development. As a humanitarian service organization, we hold it as both a cornerstone of our mission and an area of focus — one of the main ways in which our members strengthen communities.

Rotary's peacebuilding initiatives seek to create environments where lasting peace is possible. We do this by:

- Continually investing in sustainable and measurable peace programs in our communities and around the globe.
- Educating and creating an extensive network of peacebuilders and community leaders dedicated to peacebuilding and conflict prevention.
- Providing members with several ways in which they can actively engage with, contribute to, and promote peacebuilding initiatives in their communities.

TAKE ACTION

Rotary supports training, education, and practices related to peacebuilding and conflict prevention through initiatives that help create social cohesion and that transform conflict in our own communities and around the world.

Our members focus on prevention and transformation — identifying and working to resolve the underlying conditions, relationships, and social structures that give rise to conflict. By addressing the causes of conflict, communities can move beyond conflict resolution or management to change the environment that led to violence or a threat of violence.

This focus on transformation helps ensure sustainable and lasting peace.

Rotary members can engage with this area of focus by designing projects and programs that:

- Enhance the capacity of individuals and communities to transform conflict and build peace
- Train community members in peace education, peace leadership, and conflict prevention and resolution
- Provide services that help integrate vulnerable people or those affected by conflict into society
- Improve dialogue and community relations to determine the best way to manage community resources
- Fund graduate scholarships for career-minded professionals related to peacebuilding and conflict prevention
- Create platforms for cross-cultural exchanges and dialogue

The Rotary Action Group for Peace and the Rotary Action Group for Refugees, Forced Displacement, and Migration bring together a family of Rotary and like-minded support clubs



PEACEBUILDING AND CONFLICT PREVENTION

TIPS FOR SUCCESS

- 1 Use role-playing, sports, or other experience-based learning methods to teach children and young adults socially appropriate ways of dealing with conflict.
- 2 Work with local organizations that community members trust and have a relationship with.
- 3 Train community leaders in strategies to prevent and mediate conflict, such as facilitating community dialogue and initiating alternative dispute-resolution practices.
- 4 Partner with Rotary Peace Fellows and other conflict-prevention experts and organizations.

Enroll in the
**Rotary
Positive
Peace
Academy.**





DISEASE PREVENTION AND TREATMENT

PREVENTING DISEASE

Noncommunicable diseases, such as cardiovascular diseases, diabetes, dementia and cancer, accounted for seven of the world's top 10 causes of death in 2019, according to the World Health Organization. Each year, more than 15 million people aged 30 to 69 die prematurely as a result of noncommunicable diseases, with 85% of those premature deaths occurring in low- and middle-income countries.

Despite a global decline in the percentage of deaths due to communicable diseases, they remain a challenge, primarily in low- and middle-income countries. Although the world is on the brink of eradicating polio, communicable diseases such as tuberculosis, HIV/AIDS, and malaria are still leading causes of death in these countries with reports of decreasing or plateauing progress.

And according to the WHO, 1 billion people suffer from neglected tropical illnesses, such as dengue fever, Chagas' disease, sleeping sickness, and river blindness.

Provide training to local health care providers and community health workers.

TIPS FOR SUCCESS

- 1 Consult with Rotary members who have medical or public health expertise to assist in developing your project idea.
 - 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 health care workers and other health and medical volunteers to support project development and implementation.
- Partner with successful community-based organizations to strengthen their capacity and expand existing services.

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

Organize activities to address behavior that can be changed, such as an unhealthy diet, a lack of physical activity, and the harmful use of substances such as tobacco and alcohol.





DISEASE PREVENTION AND TREATMENT

HEALTH CARE SERVICES

Less than half of the global population has access to essential health services, according to the United Nations. Major disruptions such as the COVID-19 pandemic, natural disasters, and high-conflict situations could reverse decades of improvement in preventing both communicable and noncommunicable diseases by decreasing access to health care professionals, facilities, and other services. More than 40% of all countries have fewer than 10 medical doctors per 10,000 people, and more than 55% of countries have fewer than 40 nurses and midwives per 10,000 people. An additional 18 million health workers are needed, primarily in developing countries.

TIPS FOR SUCCESS

- 1 Work with local, regional, district, and national health systems to increase people's access to equipment, facilities, and the latest health care programs.
- 2 Incorporate innovative technologies and tools to extend the reach of health centers.
- 3 Work with local health centers to develop programs that attract health workers with a variety of skills.
- 4 Work with local universities, nursing schools, and other health care training facilities to provide education in locations where employees live, in order to maximize retention rates.

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

Improve the quality of existing services, taking an approach to health systems and infrastructure that involves people as partners in their own care.

More than 10 Rotary Action Groups can help clubs and districts plan and implement activities to address a wide range of diseases such as malaria, diabetes, HIV/AIDS, and Alzheimer's and other types of dementia.





WATER, SANITATION, AND HYGIENE

SANITATION AND HYGIENE

Nearly 2 billion people lacked access to basic sanitation facilities in 2020, according to UNICEF figures. Of these, 673 million still defecate in the open. Poor sanitation is linked to the transmission of diseases such as cholera, diarrhea, dysentery, hepatitis A, typhoid, and polio. It can also undermine the growth and development of children.

At least 10% of the world's population is estimated by the WHO to consume food irrigated by untreated wastewater. Each year, 297,000 children under the age of five die from preventable water and sanitation-related diarrheal diseases.

TIPS FOR SUCCESS

- 1 Avoid telling a community what sanitation solutions it needs. Instead, work with residents to determine what technology and education is most appropriate, and explore several options. Be sure to include women in the discussion and decision-making process.
- 2 Use professionals to develop and implement hygiene education programs that use participatory learning to promote behavior changes and healthy habits. Teaching that uses only methods such as lectures or informational pamphlets is rarely successful.
- 3 Avoid fully subsidizing or donating toilet facilities to households, especially if a local market for sanitation is developing in the region. This can undermine the growth of local sanitation businesses and sanitation marketing campaigns.



Train teachers to instruct students in healthy habits in schools, using participatory lessons in sanitation and hygiene and including subjects such as menstruation.



Increase access to water and sanitation services and expand watershed protection and restoration measures to improve water quality and quantity and reduce the vulnerability to water-related risks and stresses.



Support communities as they construct their own toilets, using local materials and resources.



WATER, SANITATION, AND HYGIENE

IMPROVING WATER QUALITY AND ACCESS TO WATER

By 2025, the UN says, 1.8 billion people will be living in countries or regions with absolute water scarcity, and two-thirds of the world's population could be living under water-stressed conditions. Some 663 million people don't have clean drinking water, UN figures show. And globally, women and children spend 200 million hours every day collecting water, according to UNICEF.

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

TIPS FOR SUCCESS

- 1 Work with community members to establish a water committee and a fee system to allow the ongoing operation and maintenance of the water system.
- 2 Conduct a hydrogeological survey before digging or drilling a well to determine the quality of the water supply and whether enough water will be accessible all year to meet the demands of users such as families, farmers, and businesses.
- 3 Include government and private-sector enterprises in the design, implementation, and monitoring of the project to solidify the long-term community participation.
- 4 Consider government standards and guidelines for water and sanitation facilities. Refer to WHO standards if national standards don't exist.
- 5 Understand that providing access to a water supply does not guarantee people safe drinking water. Assess a water source for bacteriological or chemical contamination to determine if the water needs to be treated or purified for consumption.



THE UN
Work with regional governments and private agencies to **expand water resource management, conservation, and restoration** activities in your local watershed. Ensure that water, sanitation, and hygiene services align with and are integrated into the watershed management plans.

THE UN
Improve the **management** of water resources, which will lead to better water, sanitation, and hygiene services and improve people's health. Strengthen the link between communities and water, sanitation, and hygiene providers by

THE UN
Work with communities and local governments to **identify long-term funding** methods to expand and rehabilitate water systems.



MATERNAL AND CHILD HEALTH

CHILD HEALTH CARE

An estimated 5.2 million children under age five died mostly from preventable and treatable causes in 2019, according to the WHO. Globally, preterm birth, birth asphyxia and trauma, and congenital anomalies, as well as infectious diseases such as pneumonia, diarrhea, and malaria, are the leading causes of these deaths. More than 80% of these deaths occurred in sub-Saharan Africa and central and southern Asia.

The UN Sustainable Development Goals include specific targets for reducing the preventable deaths of newborns and children under age five by 2030.

REPRODUCTIVE HEALTH

According to the WHO, 214 million women in developing countries had unmet needs for modern contraception in 2017. Having access to contraception offers benefits including more possibilities for education and economic development, and in some cases prevents the transmission of HIV and other sexually transmitted infections.

TIP FOR SUCCESS

1 Take the time to understand people's beliefs about contraception and create an environment of open, nonjudgmental communication to build productive working relationships in the community.

Promote good nutrition, especially for women who are pregnant, might become pregnant, or recently gave birth. **Encourage** exclusive breastfeeding whenever possible for the first six months of a child's life.

Develop or support programs that provide immunizations against vaccine-preventable diseases for children under age five.

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

Eliminate mother-to-child HIV transmission by increasing access to testing and antiretroviral drugs.

Provide information about and access to testing and treatment for HIV and other sexually transmitted infections.

The Rotary Action Group for Reproductive, Maternal, and Child Health and the Rotary Action Group for Clubfoot help clubs and districts adapt proven solutions that improve maternal and child health and that meet the needs of local communities.





MATERNAL AND CHILD HEALTH

ANTENATAL CARE, CHILDBIRTH, AND POSTPARTUM CARE

In developing countries, 1 in 45 women is at risk of dying from causes related to pregnancy, childbirth, and postpartum care compared with 1 in 5,400 in developed countries, according to the WHO.

In 2017, 810 women around the world died every day from preventable and treatable complications during and after pregnancy and childbirth. These complications included severe bleeding, infections, other delivery issues, and high blood pressure during pregnancy.

About 94% of these deaths occur in developing

countries, and 80% of them could be prevented with access to reproductive health services, prenatal care during pregnancy, skilled care during childbirth, and postpartum care.

Organize efforts to provide birthing kits to health professionals

Support training programs for health professionals and community health workers.

TIPS FOR SUCCESS

- 1 Consult Rotary members who are trained in maternal and newborn health care, such as midwives, obstetricians, and gynecologists, to assist in developing your project idea.
 - 2 Work with local, regional, district, and national health systems to increase access to equipment, facilities, and the latest maternal and child health care programs.
 - 3 Work with community-based organizations that have expertise in maternal and child health.
 - 4 Empower community members to take over the management of training programs for local health care workers in order to ensure their sustainability.
- Support **projects** that provide access to prenatal care in underserved communities.

Educate people about the need for prenatal health care early in a pregnancy.





BASIC EDUCATION AND LITERACY

More than 79.5 million people fled war, persecution, and conflict in 2019, according to the United Nations — the highest number the organization had ever recorded. Although the solutions that will end violent conflict are complex, Rotary believes that when groups of dedicated people work to create peace in their communities, their efforts can have a global effect.

TEACHER PROFESSIONAL DEVELOPMENT

Teachers around the world face challenges every day as they seek to serve their students and provide them with the best education possible.

In addition to the usual challenges, the COVID-19 pandemic illustrated that many teachers didn't have the training or equipment to lead or provide distance education — especially those with no initial teacher education and few opportunities for in-service training.

To reach universal primary and secondary education in 2030, nearly 69 million more teachers are needed, according to the UN — more than 24 million for primary education and more than 44 million for secondary education. Sub-Saharan Africa has the lowest percentage of trained teachers: 65% at the primary level and 51% at the secondary level. The ratio of pupils to trained primary teachers is 58-to-1 in sub-Saharan Africa and 40-to-1 in southern Asia.

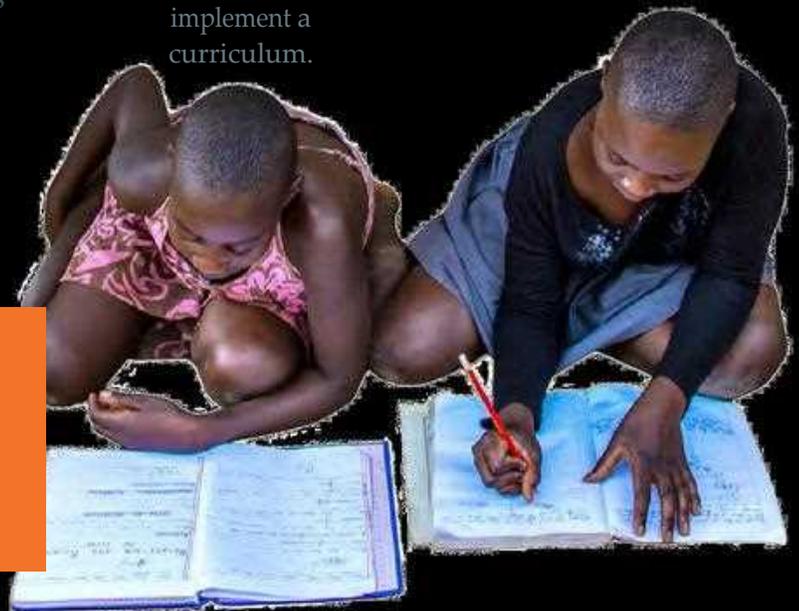
TIPS FOR SUCCESS

- 1 Spend time talking with people in the school community, especially teachers, before planning a project to make sure you understand their goals, strengths, challenges, and needs.
- 2 Develop long-term relationships with teachers to ensure that they have access to the latest training and materials.
- 3 Consult with local education officials to design appropriate teacher training programs and ways to implement them that will complement the school, local, or curriculum.

Organize a vocational training team to offer underserved communities training in how to implement a curriculum.

Provide professional development for teachers and supplies such as teaching aids, textbooks, and classroom enhancements.

The Basic Education and Literacy Rotary Action Group brings together experts from many educational specialties to help clubs and districts design and implement effective programs.





BASIC EDUCATION AND LITERACY

SUPPORTING STUDENTS

Access to school has always been a global challenge. It was only exacerbated by the COVID-19 pandemic, which forced about 90% of all students, or about 1.6 billion people, out of school. It also put many marginalized students at a further disadvantage because they were excluded from distance learning opportunities.

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 a vital part of sustainable community development.
- 2 Empower students, parents, teachers, and administrators as decision-makers in your activities.
- 3 Work with local organizations that can offer advice and resources to help you organize a training, tutoring, adult literacy, or mentoring program.

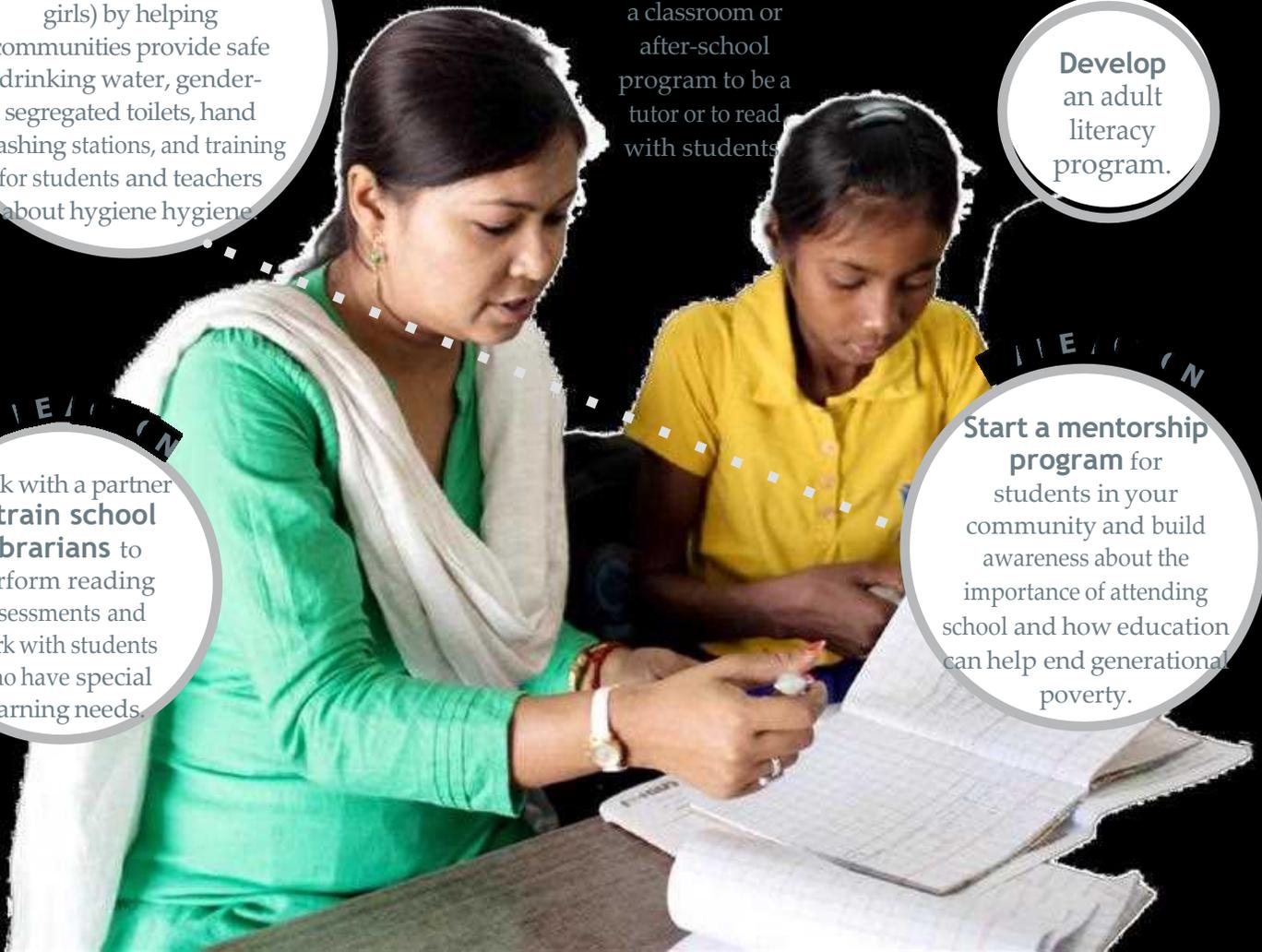
Promote student enrollment and prevent absences (especially for girls) by helping communities provide safe drinking water, gender-segregated toilets, hand washing stations, and training for students and teachers about hygiene hygiene.

Volunteer with a classroom or after-school program to be a tutor or to read with students.

Develop an adult literacy program.

Work with a partner to **train school librarians** to perform reading assessments and work with students who have special learning needs.

Start a mentorship program for students in your community and build awareness about the importance of attending school and how education can help end generational poverty.





BASIC EDUCATION AND LITERACY

Global extreme poverty rose in 2020 for the first time in more than 20 years, the World Bank said, as the COVID-19 pandemic compounded the effects of conflict and climate change — which were already slowing the progress in reducing poverty. The World Bank expected about 150 million additional people to be living in poverty by the end of 2021 as a result of the pandemic.

In 2018, 4 out of 5 people below the international poverty line lived in rural areas.

- Half of the poor are children. Women are a majority of the poor in most regions and in some age groups.
- Climate change could drive 68 million to 132 million people into poverty by 2030. The issue is a particular threat in sub-Saharan Africa and southern Asia, where most of the global poor are concentrated.

INCOME GENERATION AND FINANCIAL INCLUSION

About 1.7 billion adults around the world don't have an account at a financial institution or through a mobile money provider, according to a 2017 World Bank report. That was down from 2 billion in 2014.

More than 55 countries have made commitments to financial inclusion since 2010, the World Bank said, with more than 60 launching or developing a national strategy.

Partner with a local and credible microlender to **improve people's access to financial services** and support a financial infrastructure in the community.

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 you support 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 can help identify barriers to the community's economic progress and develop sustainable solutions.
- 3 Provide training to people based on the community's needs, with a clear plan to sustain the projects and businesses.

Encourage and **support sustainable sourcing**, such as village savings groups, for rural areas. Equipment to support farming or other trades is beneficial if you include training in the project. Providing tools and training so that the community can be self-sufficient encourages sustainability.





BASIC EDUCATION AND LITERACY

JOB CREATION AND ENTREPRENEURSHIP

Unemployment and underemployment caused by the coronavirus crisis affected as many as 1.6 billion workers in the informal economy – half of the global workforce, according to the International Labour Organization.

Only 47% of women of working age took part in the labor market in 2020, compared with 74% of men, according to the UN. The number is even lower in southern and western Asia and northern Africa, where less than 30% of women are part of the labor market.



TIPS FOR SUCCESS

Consider which skills job seekers need for the local market and avoid teaching skills that aren't in demand.

Design your training in partnership with local networks (such as those that offer apprenticeships and international opportunities) to ensure that the training is relevant and that relationships can develop between trainers, trainees, and prospective employers. Remember that skill development can occur in formal, informal, and on-the-job settings.

Engage with existing networking systems or create appropriate ones. Recruit high-potential participants, especially women.





BASIC EDUCATION AND LITERACY

Global environmental issues represent some of the defining challenges facing humanity, and solutions that account for our relationship with nature and natural resources connect us both locally and globally. More than half of the UN's 17 Sustainable Development Goals for 2030 are closely linked to environmental sustainability.

The scale and interconnectedness of these challenges means that communities and organizations need to observe basic safeguards but are also empowered to take positive and restorative action. Rotary members have organized thousands of community-based solutions across the globe to support a healthy environment, from beekeeping in Germany to preventing deforestation in the Philippines and harvesting rainwater at schools in Jordan. The environment presents a wealth of service opportunities.

TAKE ACTION

Rotary supports activities that strengthen the conservation and protection of natural resources, advance environmental sustainability, and foster harmony between people and the environment. Our members work on addressing environmental problems such as pollution and habitat degradation. Addressing the root causes of such problems for the benefit of people and nature often requires collaboration with multiple stakeholders.

You can engage with this area of focus by designing projects and programs that seek to:

- Protect and restore land, coastal, marine, and freshwater resources
- Enhance the capacity of communities and local governments to support natural resource management and conservation
- Support agroecology and sustainable agriculture, fishing, and aquaculture practices to improve ecological health
- Address the causes of climate change and climate disruption and support solutions to reduce the emission of greenhouse gases
- Strengthen the resilience of ecosystems and communities affected by climate change and climate disruption
- Support education to promote behaviors that protect the environment
- Advocate for the sustainable consumption of products and the environmentally sound management of byproducts to build a more resource-efficient economy
- Address environmental justice issues and environmental public health concerns

The Environmental Sustainability Rotary Action Group helps clubs and districts carry out a range of environmental programs by understanding the best practices, working with other organizations to create resources and learning opportunities, and advising on program design and implementation.





BASIC EDUCATION AND LITERACY

TIPS FOR SUCCESS

- 1 Recognize that public environmental programs are often underfunded or deprioritized, so think about what gaps a Rotary project could fill.
- 2 Work with local organizations that have the trust of community members and relationships with them.
- 3

When the environment overlaps with other areas of focus, consider approaches that foster equitable access and benefits from clean air, clean water, sustainable agriculture, green spaces, and climate adaptation.

Find project ideas from the **World Environment Day** handbook.



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, 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

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.

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

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

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

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

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

5 effectively to environmental and socioeconomic changes.

- 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

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 (coming soon).

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

FOUNDATION RECOGNITION

The Rotary Foundation offers numerous opportunities for individuals who support our grants and programs to receive recognition and appreciation.

On [My Rotary](#), you can view your Donor History Report, which includes your personal contribution history and recognition summary. You can also request this report by emailing rotarysupportcenter@rotary.org.

INDIVIDUAL RECOGNITION

Rotary leaders can use My Rotary or Rotary Club Central to view individual and club-level giving to identify recognition progress.

Rotary Foundation Sustaining Member

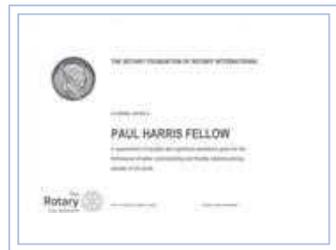
A Rotary Foundation Sustaining Member personally contributes \$100 or more each Rotary year to the Annual Fund. These contributions count toward Paul Harris Fellow, Multiple Paul Harris Fellow, Paul Harris Society, Major Donor, and club recognition banners. Use the [Rotary Foundation Sustaining Member stickers](#) to recognize these donors in your club.



Use the Club Foundation Banner Report to see your club's Rotary Foundation Sustaining Members.

Paul Harris Fellow

Paul Harris Fellow recognition is given to anyone who contributes (or in whose name is contributed, using Foundation recognition points) a gift of \$1,000 or more cumulatively to the Annual Fund, the PolioPlus Fund, or an approved global grant. Recognition consists of a certificate and pin. Use the Club Recognition Summary to see your club's Paul Harris Fellows.



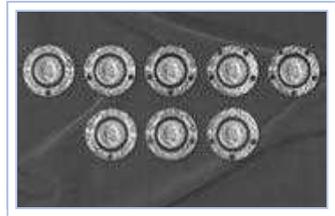
Certificate of Appreciation

Certificate of Appreciation recognition is given to honor a business or organization. Since Paul Harris Fellow recognition is only for individuals, a donor may use their Foundation recognition points to award a business or organization a certificate of appreciation.



Multiple Paul Harris Fellow

Multiple Paul Harris Fellow recognition is given at subsequent \$1,000 levels. Recognition consists of a pin set with additional stones corresponding to the recipient's recognition amount.



Level	Range*	Pin
+1	\$2,000 to \$2,999	one sapphire
+2	\$3,000 to \$3,999	two sapphires
+3	\$4,000 to \$4,999	three sapphires
+4	\$5,000 to \$5,999	four sapphires
+5	\$6,000 to \$6,999	five sapphires
+6	\$7,000 to \$7,999	one ruby
+7	\$8,000 to \$8,999	two rubies
+8	\$9,000 to \$9,999	three rubies

*Range can consist of a combination of cash contributions and Foundation recognition points received.

Paul Harris Society

The Paul Harris Society recognizes individuals who notify us of their intention to contribute \$1,000 or more each Rotary year to the Annual Fund, the PolioPlus Fund, or an approved global grant. Recognition consists of a chevron-style pin and certificate provided by your district Paul Harris Society coordinator.



Paul Harris Society members are listed in the Paul Harris Society Report.

Major Donor

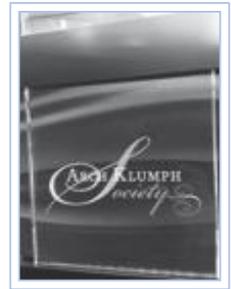
The Rotary Foundation recognizes individuals or couples whose combined giving has reached \$10,000, regardless of the gift designation. This recognition level can be achieved only through personal contributions and not through recognition points. Major Donors may elect to receive a crystal recognition piece and pin(s) commemorating the gift at each new recognition level. Major Donors are listed in the Major Donor, Arch Klumph Society, and Bequest Society Report.



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

Arch Klumph Society

Donors who contribute \$250,000 or more become members of the Arch Klumph Society. Portraits, biographies, and, in some cases, video clips are housed in the digital Arch Klumph Gallery on the 17th floor of Rotary International World Headquarters; another digital gallery travels to Rotary events around the world. Members also receive lapel pins and pendants, signed certificates, and invitations to the society's exclusive events, held worldwide. Special induction ceremonies are offered to members. Arch Klumph Society members are listed in the Major Donor, Arch Klumph Society, and Bequest Society Report.



- Trustees Circle — \$250,000 to \$499,999
- Chair's Circle — \$500,000 to \$999,999
- Foundation Circle — \$1 million to \$2,499,999
- Platinum Trustees Circle — \$2.5 million to \$4,999,999
- Platinum Chair's Circle — \$5 million to \$9,999,999
- Platinum Foundation Circle — \$10 million and above

Benefactor

A Benefactor is an individual who notifies The Rotary Foundation of a commitment for future gifts to the Endowment of \$1,000 or more included in their estate plans or who makes an outright gift of \$1,000 or more to the Endowment. Benefactors receive a certificate and insignia to be worn with a Rotary or Paul Harris Fellow pin. They are listed in the Benefactor Report and identified in the Club Recognition Summary.



Bequest Society

Individuals or couples who notify The Rotary Foundation of their commitment to include future gifts to the Foundation of \$10,000 or more in their estate plans are invited to join the Bequest Society. Each level of giving includes the benefits of the preceding levels:



- \$10,000 A Bequest Society pin and an exclusive art piece suitable for framing
- \$25,000 A Rotary's Promise crystal and a named endowed fund
- \$50,000 Separate named endowed funds
- \$100,000 A customized Rotary's Promise crystal
- \$250,000 Posthumous induction into the Arch Klumph Society
- \$500,000 Special seating and registration benefits at the Rotary International Convention



Legacy Society

Individuals or couples who substantiate future gifts to the Endowment of \$1 million or more are invited to join the Legacy Society. These donors are listed in Rotary's annual report and are invited to exclusive Rotary International and Foundation events. Legacy Society members also receive special tokens of appreciation and all the benefits provided to Bequest Society members.

CLUB RECOGNITION

The Rotary Foundation offers clubs several opportunities to earn recognition for their support of its grants and programs.

The Club Foundation Banner Report displays a club's progress in the current Rotary year toward becoming a 100% Foundation Giving Club and a 100% Every Rotarian, Every Year Club, and toward qualifying for Top Three Per Capita in Annual Fund Giving banner recognition.

As of 2015-16, new club members (those who joined or transferred from another club during the current Rotary year) are not included in participation requirements for club banners (except for the 100% Paul Harris Fellow Club banner). However, new members' contributions will be used for per capita calculations.

Banner recipients listed in the Club Foundation Banner Report (available to club and district Foundation leaders on My Rotary or Rotary Club Central) may fluctuate throughout the Rotary year due to changes in membership and additional or redistributed contributions. Leaders can use the report to determine whether your club will qualify for the annual recognition banners listed below. Final banner certification is processed by The Rotary Foundation following the close of the Rotary year on 30 June. Club banners earned for the previous year are shipped to the current district governor in October or November. Request the District Foundation Banner Report at rotarysupportcenter@rotary.org.

100% Foundation Giving Club

This banner is awarded to clubs that achieve an average of \$100 in per capita giving and 100% 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% Paul Harris Fellow Club

For a club to be eligible, every dues-paying member must be a Paul Harris Fellow at the time the district governor requests banner recognition. This recognition is a one-time-only award, but the intent is that the club will maintain its membership at the 100% Paul Harris Fellow level.



To obtain this recognition:

1. A club representative contacts the district governor after determining that all current dues-paying club members are Paul Harris Fellows.
2. The district governor confirms that all members are Paul Harris Fellows by using the Club Recognition Summary, and then notifies The Rotary Foundation by email at rotarysupportcenter@rotary.org.

The top of the Club Recognition Summary indicates whether the club received the 100% Paul Harris Fellow Club banner, along with the date this was achieved.

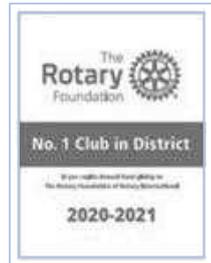
100% Every Rotarian, Every Year Club

Rotary clubs must 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.



100% Rotary's Promise Club

Rotary clubs with 100% of members supporting the Endowment are eligible to request a Rotary's Promise Club electronic certificate. Commitments for future gifts to The Rotary Foundation of \$1,000 or more included in an estate plan, or outright gifts of \$1,000 or more to the Endowment, qualify as support.



Top Three Per Capita in Annual Fund Giving

Banners are given to the three clubs in each district that give the most per capita to the Annual Fund. To be eligible, clubs must achieve a minimum of \$50 in per capita annual giving.



100% Paul Harris Society Club

This recognition is awarded to clubs in which every dues-paying member has contributed a minimum of \$1,000 to the Annual Fund, the PolioPlus Fund, or an approved global grant during the Rotary year.

End Polio Now: Countdown to History Campaign Certificate of Appreciation

This certificate is awarded to clubs that annually contribute \$1,500 or more to Rotary's PolioPlus Fund.

Rotaract Giving Certificate

This certificate is awarded to Rotaract clubs that have at least five members who contribute a total of at least \$50 during the Rotary year. The donors must be registered as members of the Rotaract club. Their gifts can be to any fund and in any amounts totaling \$50.

FOUNDATION RECOGNITION POINTS

Foundation recognition points are awarded to donors who contribute to The Rotary Foundation through the Annual Fund, the PolioPlus Fund, or an approved global grant. Donors receive one Foundation recognition point for every U.S. dollar contributed to these funds. Contributions to the Endowment are not eligible.

Donors can extend Foundation recognition points to other individuals to help them become, or to name them as, a Paul Harris Fellow or Multiple Paul Harris Fellow. Foundation recognition points belong to the original donor until the donor uses the points or until the donor's death, at which time they expire (unless the donor is a Major Donor, in which case their points may be used by their surviving spouse or partner).

Note: Foundation recognition points do not count toward Paul Harris Society and Major Donor recognition.

Transfer rules

A minimum of 100 Foundation recognition points must be transferred at a time, and an authorizing signature is required when you complete the [Paul Harris Fellow Recognition Transfer Request Form](#).

Note: Foundation recognition points may not be transferred from individuals to a club or district. Donors no longer need to be a Paul Harris Fellow to receive recognition points.

FOUNDATION RECOGNITION RESOURCES

- [Every Rotarian, Every Year brochure](#): Information about the Annual Fund and SHARE
- [Rotary Foundation Sustaining Member stickers](#): Badge stickers to celebrate Rotary members who have contributed \$100 or more to the Annual Fund; available for order by club or district officers
- [Paul Harris Society brochure](#): Information about Paul Harris Society recognition
- [Rotary Giving Works brochure](#): Information about major gifts
- [Your Rotary Legacy commitment notification card](#): Information about the Endowment, legacy recognition, and naming opportunities; includes a response card that is required for recognition
- [Arch Klumph Society brochure](#): Information about the Arch Klumph Society
- [Understanding Foundation Recognition Points](#): Fact sheet that answers common questions about the points system
- Useful recognition reports on Rotary.org and Rotary Club Central:
 - Major Donor, Arch Klumph Society, and Bequest Society Report
 - Paul Harris Fellow and Benefactor Report
 - Club Foundation Banner Report
 - District Foundation Banner Report

GENERAL RESOURCES

MY ROTARY

The member website, known as [My Rotary](#), includes everything you need to conduct your Rotary business. Familiar tools and applications are now found under Club & District Administration. Sign in so you can:

- Monitor club membership initiatives, service activities, and Foundation giving goals through Rotary Club Central
- Donate to The Rotary Foundation
- Learn more about Rotary Foundation activities Apply for grants in the Grant Center
- View your Donor History Report, which includes your contribution history and recognition summary
- Share your project impact and inspire others on Rotary Showcase

Reports

Rotary leaders can access the following reports through My Rotary, Rotary Club Central, or Rotary's Support Center.

Please note that Foundation giving reports should be used for authorized Rotary purposes only. By using these reports, you agree to abide by Rotary's [Data Use Policy](#), which prioritizes protecting individual privacy and personal information. Leaders who have access to reports are strongly encouraged to read the policy and to take the [Protecting Personal Data](#) course in the Learning Center.



2023 Lone Star PETS

SUPPLEMENTAL RESOURCES

MODULE B-5

*Developing Effective
Service 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

154

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.

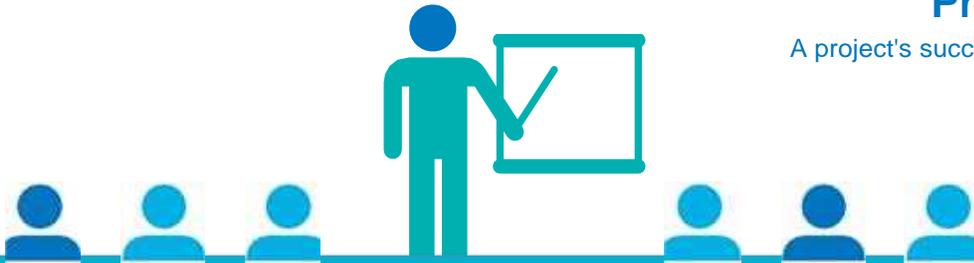
Encourage local ownership

Identify key community members who can help pioneer lasting improvements.



Provide training

A project's success depends on people.



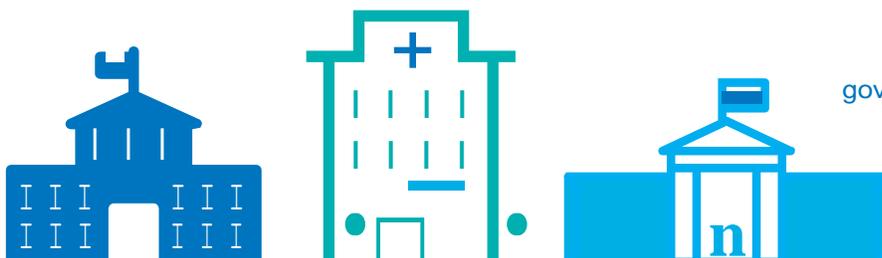
Buy local

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

PROJECT PLANNING RESOURCES

Use these resources to find solutions to questions at various steps of the process to help you plan a successful project, find support for your efforts, promote your work, and evaluate its impact.



Click on each resource to learn more.

“I’m looking for international service projects undertaken by other clubs in my district for my club to join to make a greater impact.

District International Service Committee

inspires clubs to become more involved in international service, connects them to local mentors who use their subject-matter expertise to help develop projects with greater impact and sustainability, and helps identify potential international project partners.

“I want to find local experts to help my club write grants as well as plan, design, implement, monitor, and evaluate our project.

Rotary Community Corps (RCC)

is a team of non-Rotarian men and women who work in partnership with Rotary clubs to improve their communities. By bringing community input and involvement in projects, RCCs enhance Rotary’s impact and reach.

“Our club wants to ensure that our project is sustainable and is maintained and monitored by a community group.

District Resource Network

is coordinated by the District International Service Committee and includes local subject matter experts with skills and experience to help clubs strengthen projects, whether funded by The Rotary Foundation or another source.

“I want to involve local residents in planning, designing, implementing, and overseeing a project.

Rotary Action Groups are international, Rotary-affiliated groups, whose members have subject-matter expertise in a particular service area. They offer technical assistance and best practices to clubs and districts in planning and implementing effective projects, and help identify partners and funding resources.

“I want help from experts in:

- Project planning
- Community assessments
- Project design
- Finding partners
- Project funding
- Supporting an international program

Rotary



I am looking to empower my community and get more involved with local service projects.

District Community Service Committee

motivates clubs and helps them plan and implement impactful local service projects, often in partnership with RCCs and in coordination with youth service committees overseeing Interact, Rotary Youth Leadership Awards, and New Generations Service Exchanges.

“ I’m looking for examples of international service projects undertaken by other clubs in my district to inspire mine.

Rotary Showcase

features both ongoing and completed service projects that can help clubs find international partners and inspire the global Rotary community with project ideas that members can replicate locally.

“ I have questions about global grant eligibility and project design.

“ I need help with the global grant application process.

TRF Cadre of Technical Advisers

are Rotarians with professional expertise in our areas of focus. They have experience designing, evaluating, and monitoring projects funded by The Rotary Foundation and understand Foundation policies and global grants.

“ I want to seek Foundation grant funding for my project. I need help with:

- Project planning
- Community assessment
- Project design
- Monitoring and evaluation

Rotary Grants Staff

help clubs and districts throughout the grant process. They can answer questions about global grant eligibility and project design.

“ I want to learn more about Rotary Foundation grants.

District Rotary Foundation Committee

educates and inspires clubs to participate in Rotary Foundation grant and fundraising activities in the district, assists clubs with the grant process, helps determine if activities are eligible for grant funding, and oversees distribution of District Designated Funds.

“ I’m seeking District Designated Funds to support my project.

Rotary



“ I’m looking for international events that will let me explore the local community and find Rotary and Rotaract projects to support as an international partner.

Project Fairs

facilitate prospective international project partners by giving international visitors a chance to learn about a local community’s needs and develop relationships with clubs in regions where the fairs are hosted.



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SUPPLEMENTAL RESOURCES

MODULE B-6

*Strategies for Successful
Fundraising*

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.



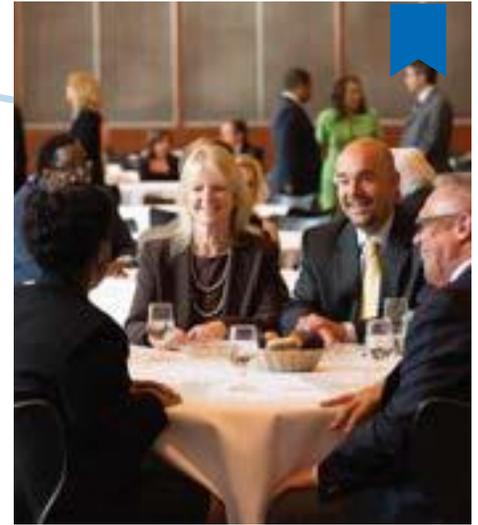


EVENT PLANNING GUIDE



Hosting or participating in an event is an excellent way to raise your club's profile, and Rotary's, in your community. Community events also offer an opportunity to raise awareness, establish relationships, inspire action, and highlight the progress Rotary has made in your area. It can start conversations among local leaders and influencers and get them involved in Rotary.

This guide, which includes ideas to get you started, a planning checklist, and a list of resources, will help you use events effectively.



1

DECIDE WHAT THE EVENT SHOULD ACCOMPLISH

Holding an event can be the perfect strategy for meeting club goals.

- ⊕ Do you want to raise awareness of Rotary in your community?
- ⊕ Does your club want to attract new members?
- ⊕ Do you need to raise funds?
- ⊕ Do you want to position your club's members as resources and experts in the community?



2

CHOOSE THE TYPE OF EVENT THAT'S BEST FOR ACHIEVING YOUR GOALS

KEY

-  EASY
-  MEDIUM
-  COMPLEX

IDEAS FOR BUILDING AWARENESS OF ROTARY



Be an exhibitor at a local event: Reserve a booth or table at a farmers' market, block party, convention, etc. Find volunteers to staff the booth and give out materials about Rotary.



Sponsor a major event in town: Perhaps an annual parade in your community can become the Rotary Club of [Your Town] Parade. Or start an annual run/walk under your club's name.



Hold a one-day Rotary festival: Feature local musicians and artists, food from local restaurants, and booths representing local businesses. Give the festival a name — Main Street Rotary Club of [Your Town] Fest, for example — and have club members there throughout the day to chat with attendees about what Rotary does and how your club works in the community. Collect email addresses and phone numbers of attendees to use for recruitment. If you can make the festival an annual event, it will become a reliable tool for generating interest and new members.



IDEAS FOR ATTRACTING MEMBERS

Hold a membership day: Have each member invite someone who has shown an interest in Rotary. Make sure your program has both a social and an educational component. For example, schedule a meet-and-greet hour with refreshments, then have a notable speaker discuss a topic of interest to the community. Welcome your guests by introducing your club and several members. Follow up by telling guests the steps they can take to get involved or to join.



Give a presentation in the community: Attend a meeting or event of another association or organization and give a presentation about Rotary and your club. Be sure to bring membership and club materials for attendees. Invite interested community members to your next meeting.



Co-host an event with another organization: Cross-promotion is an effective way to increase membership. Work with another organization from your community to host an event that gives members of both groups a chance to network and learn how to get involved. As an incentive, offer a reduced first-year membership fee for the other organization's members if they join your club.



IDEAS FOR FUNDRAISING

Host an artisan market: Invite local artists to sell their work, paying a fee for space, then donate the proceeds to The Rotary Foundation. Such a market can promote your club's community and international projects and encourage attendees to contribute to the Foundation themselves. Use your resources and connections to ensure that your event meets high standards. Invite local chefs, brewers, or bartenders to serve samples of their food and beverages to draw visitors.



Pair a fundraising event with a silent auction: Sell tickets to a full-service event that includes food and beverages, dancing, and a compelling speaker with a connection to Rotary's causes. Proceeds can go to The Rotary Foundation or a club project. Adding a silent auction will boost your fundraising. Gather items of value from corporations and community partners, as well as offering professional services by club members.



Hold a thank-a-thon: Gather club members for a session of writing thank-you notes to your club's donors from the past few years. (Donations are not limited to funds but can include space, supplies, food, etc.) In addition to expressing your appreciation, this gesture will keep your club in the minds of donors and partners and make it easier to solicit future donations.



IDEAS FOR ENGAGING THE COMMUNITY

Invite speakers to your club: Host representatives of local companies, professionals, and community activists and leaders. Having them discuss their area of expertise with your members will raise your club's profile among other community influencers and could lead to long-term partnerships. Also, notable speakers might attract new members.



Plan a project related to one of Rotary's areas of focus: For example, sponsor a food, clothing, or book drive; host a health and wellness fair; or fix up a community center or park. Service is at Rotary's core, so a service project highlights our values and the good work that we do.



Host a panel event: Panel discussions can showcase Rotary as a key influencer. Invite leaders to participate in a discussion about locally important issues. Speakers could include representatives from local organizations, academic or professional experts, politicians and civic leaders, and Rotarians. Tips for success: Include an interactive segment, and invite people who have a connection to the topic to have a booth or table at the event so that community members can get more information and network with them.



TIMEFRAME	TASKS
18-12 weeks before (continued)	<ul style="list-style-type: none"> <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	<ul style="list-style-type: none"> <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	<ul style="list-style-type: none"> <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





TIMEFRAME	TASKS
6-4 weeks before	<ul style="list-style-type: none"><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	<ul style="list-style-type: none"><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



TIMEFRAME	TASKS
<input data-bbox="165 170 233 237" type="checkbox"/> 1 week before	<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
<input data-bbox="165 623 233 690" type="checkbox"/> 2 days before	<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	<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

4

BUILD ON YOUR EVENT'S SUCCESS

To maximize your event's long-term impact and make it easier to hold future events:



Send thank-you notes: Be sure to thank speakers, event partners, attendees, and volunteers.



Stay connected: Following up to say thank you is also a great opportunity to solicit opinions on the event. And remember to send periodic updates to those who expressed interest in Rotary, your club, or a project.



Pursue event coverage: Media can't always attend an event, so send materials about it afterward. Include photos and videos that highlight noteworthy speakers and attendees who are of interest to that media outlet. Don't forget that social media can be effective in amplifying event coverage, so post highlights of the event and any media coverage it received.



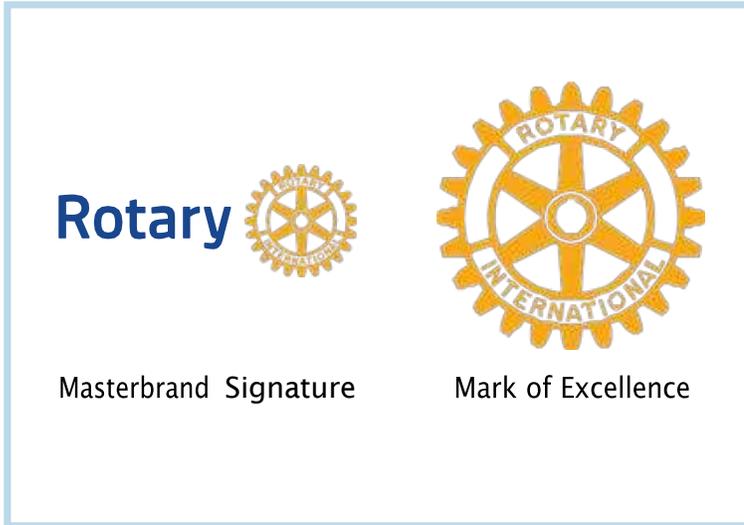
Tell us how it went: Email a summary of your event to pr@rotary.org. You can also share your event's success by visiting www.rotary.org/rotarystory and posting images or video. Add #rotarystory to a Facebook, Instagram, or Twitter post about your event. Spreading the word about your event will inspire Rotarians in other communities. Together, we can raise awareness of Rotary.



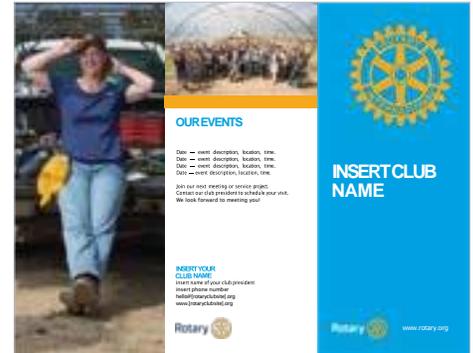
EVENT RESOURCES

A range of handy event resources are available on the **Brand Center**, **Rotary Shop**, and **My Rotary**:

OFFICIAL LOGOS



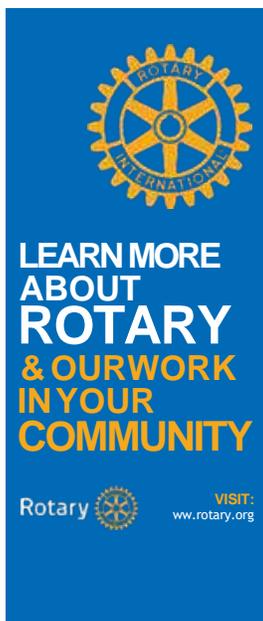
CLUBBROCHURETEMPLATE



OTHER PROMOTIONAL RESOURCES:

- 🌐 Prospective member brochure
- 🌐 Discover Rotary presentation

ROTARY AND AREAS OF FOCUS ROLL-UP BANNERS



ADDITIONAL RESOURCES ON THE BRAND CENTER:

- 🌐 Newsletter, presentation, and letterhead templates
- 🌐 Thank-you card

🌐 If you need help getting started, or get stuck planning, we're here to assist. Email pr@rotary.org. Event promotion examples listed in the brand guidelines (posters, cards, digital assets)

Rotary



| 2023 Lone Star PETS

SUPPLEMENTAL RESOURCES

MODULE C-7

*Enhancing the Public Image
of Your Rotary Club*

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.

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!



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 PUBLIC RELATIONS GUIDE



[ROTARY.ORG](https://www.rotary.org)

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WELCOME TO THE ROTARY PUBLIC RELATIONS GUIDE

Publicity is essential to telling Rotary's story. By getting your club's activities promoted in your local news, you increase your community's understanding of Rotary and strengthen our ability to improve lives around the world.

In this guide you'll find tips, templates, and best practices for developing an effective public relations campaign. As a result, you will:

- Show Rotary's impact and value in your community
- Cultivate relationships with journalists and employ the right tactics and tools to get media coverage
- Clearly convey your message during interviews
- Manage, and respond effectively to, media inquiries during a crisis



ROTARY AS A NEWS SOURCE

As business and professional leaders who have a passion for taking action to improve communities at home and abroad, Rotary members offer journalists a unique viewpoint, along with access to people and information they want to cover.

You can get your club's activities the media attention they deserve by submitting well-written, relevant, and compelling media pitches. Consider the following when you're developing your pitch for your media contacts:

- **News hook:** Does your story relate to current events, trends, or observances? For instance, stories about how your club responded to a natural disaster or how it's celebrating World Polio Day make good news hooks.
- **Timeliness:** News about upcoming, ongoing, or recently completed club events or projects.
- **Proximity:** News that pertains to issues, people, or events in the community that the media coverage would reach.
- **Prominence:** News that involves local public figures, including elected officials, business leaders, and media personalities.
- **Human interest:** News that elicits an emotional response. For example, stories about families who benefited from your club's food project or homeless children who attend a school your club helped build.
- **Visually compelling:** Dramatic, action-oriented images that visually tell your story. For example, images of children drinking clean water from a well your club built or a member vaccinating a child against polio.
- **Supporting data:** Statistics and research that support your story and demonstrate your project's impact on the community.



GETTING STARTED

WORKING WITH JOURNALISTS

Building relationships with journalists and being a knowledgeable and trusted resource on issues that affect your community — even when Rotary is not the focus — can lead to more coverage of your club's projects and events.

GET TO KNOW THE REPORTERS IN YOUR AREA

Develop a media list that includes journalists' names, contact details, and titles, along with the topics they cover. This will streamline your media outreach and allow you to quickly find the journalists who are best suited for your story. Include local bloggers and social media influencers, as well as any feedback you receive that may help you in the future.

Larger newspapers or broadcast stations may have reporters who specialize in certain topics, such as business, features, medical news, event calendars, or education. A business writer may be interested in your club's career day for students or a microloan project; an education writer may want to interview an exchange student or Rotary Peace Fellow; feature writers are best for club member profiles; and a health reporter may want to cover your club's support for ending polio.

TIPS FOR WORKING WITH JOURNALISTS

- **Approach journalists strategically.** Pitch only stories that align with a reporter's publication and the topics it covers. Reporters are more likely to read and respond to your email when you send them stories that resonate with their readers.
- **Use the reporter's preferred method to submit story ideas.** Some journalists accept ideas by email only. Others prefer a phone call. Find out your reporter's preference. When in doubt, send an email first.
- **Understand their constraints and publication schedules.** Reporters often have tight schedules and need story details and accompanying materials right away. Have photos, videos, statistics, project and background data, and any other helpful material available.
- **Respond promptly to inquiries.** An opportunity you're offered could disappear if you fail to reply in time.

- **Take advantage of unexpected meetings.** Like you, journalists have social lives. When your paths cross outside of business, take the opportunity to introduce yourself and exchange contact information. Offer to send the journalist information about how Rotary members are taking action to improve communities across the globe.
- **Engage media in your club events.** Invite journalists to club meetings that feature speakers who address topics that they cover. Or invite them to participate in a project, event, or other Rotary activity.

THE STORY PITCH

When you first contact a reporter about a story:

- **Make sure the story is newsworthy** and relevant to the news organization's audience.
- **Be informative but concise.** Plan what you'll say before you contact the reporter.
- **Follow up,** but be careful about the number of times you call or email. As a general rule:
 - **Email first.** Email is best for initial contact so a reporter can process the most relevant information. Put the news release in the body of your email with a short note above it. Reporters' email addresses can usually be found on their publication's website or on their most recent stories.
 - **Call second.** If you do not receive a response, call to follow up. If you get voicemail, leave a message and allow 24 to 48 hours before following up again.
 - **Recap third.** If you don't connect with a reporter before the event, you still have an opportunity to promote Rotary. Send a message about the event's successes: fundraising goal, event photos, and milestones.
- **Share published stories on social media.** And be sure to post them on your club website and send them to your Rotary public image coordinator.



WHEN A REPORTER DECLINES TO COVER YOUR STORY

If a reporter isn't interested in your story, accept the journalist's decision, but make sure to keep their information for future opportunities. This story may not be a good fit, but that doesn't mean the next story will be rejected. Arguing with reporters only alienates them and will hurt your chances of having future stories published.

TYPES OF EDITORIAL CONTENT

In addition to contacting a journalist directly, you can create interest in your club's activities and events by using news releases, letters to the editor, and opinion pieces. Learn more about each of these types of editorial content.

NEWSRELEASE

The purpose of a news release, also called a press release, is to get the media to report on an organization and to seek additional information. Write a news release to promote a specific club event, accomplishment, or significant activity, such as a service project or dedication.

Give the key details: who, what, where, when, and why. Reporters want to know the basics right away. For instance, if you're promoting an event, include the following in your news release:

- Event host and attendees
- Topic and purpose (and why it's important)
- Date and time
- Location and registration information
- Contact information

News releases should be one page and written in the third person. Creative and compelling openings draw interest in your event, but you want your first sentence to be concise and direct.

Download sample news releases by going to the [Brand Center](#) and typing "Public Relations Resources" in the search box on the upper right-hand corner of the screen.

LETTER TO THE EDITOR

The editorial page is one of the most read sections of the newspaper and is a great place to reach a large, diverse audience. If published, letters provide a starting point for discussion, news coverage, and potential support for an event, such as funding polio vaccinations or support for a Rotary project. Letters to the editor can also be used to comment on or correct earlier news coverage.

- **Keep it short and simple.** Check your local paper for guidelines, but typically, letters are no more than 200-250 words.
- **Focus on one key message,** and make sure to state your point clearly in your first sentence.
- **Include references.** If you respond to a recent news article, previous letter, editorial, or news event, refer to it by date and headline.
- **Support your stance.** Start with a background sentence or two, state your position, and end by suggesting what the reader can do to help. If they're available, use facts or figures to support your position.
- **Be transparent.** Newspapers and magazines won't publish anonymous letters. Be sure to include all contact information that the newspaper asks for. If in doubt, check its website.
- **Follow policies.** Newspapers and magazines publish their submission policies. Review these requirements before submitting your letter.

Download sample letters to the editor by going to the [Brand Center](#) and typing "Public Relations Resources" in the search box on the upper right-hand corner of the screen.



OPINION PIECE

Opinion pieces written by experts offer readers diverse opinions on timely news issues and community concerns, and often include substantial factual information, too. Most relate to an issue in recent news, but they can also provide a fresh opinion or suggested course of action.

To maximize the likelihood that your opinion piece will be published:

- **Share.** If you have a compelling personal story or real-life example that relates to Rotary and will resonate emotionally with readers, consider including it.
- **Be concise.** Don't use Rotary jargon or vague or institutional wording. Write as if you were talking to your neighbor.
- **Edit.** Proofread your final draft to make certain it doesn't contain any grammatical or spelling errors.
- **Check the newspaper's policies.** Many won't accept opinion pieces longer than 600 words or those that have been submitted to another publication at the same time.
- **Submit and follow up.** If several days pass without any response, contact the editor to see if your piece is under consideration. Ask if you can revise it to improve its chances of being published.

See an [example of an opinion piece](#).



MEDIA INTERVIEW TIPS

BEFORE THE INTERVIEW

- **Prepare.** Develop one or two main points that you want to communicate. Rehearse what you want to say. Anticipate difficult questions, and prepare positive responses.
- **Know the media.** Know the basics about the media outlet (its focus and audience) and the reporter (look for bylines) before the interview.
- **Provide the reporter with background materials,** including a short biography of the person to be interviewed, beforehand.

DURING THE INTERVIEW

- **Answer at the top.** Answer questions first, and if necessary, transition to the point you really want to make. Even if a reporter asks a negative question, answer honestly without repeating the negative statement. Then steer the conversation to your main point.
- **Avoid the question-answer syndrome.** Don't let the reporter lead you through the interview. Keep control over your message. Use most questions as openings for opportunities to tell your story.
- **Emphasize your main points.** Reinforce your message through a technique called "flagging," using simple phrases such as "the key point is" or "most important." Repetition is another way to emphasize your key messages.
- **Prepare for difficult questions.** Consider the following techniques:
 - **Deflecting:** "It's too early to address that."
 - **Bridging:** ABC: answer or acknowledge; then "bridge" and communicate. "That was several years ago. Today we focus on..."
 - **Broadening:** "This is a societal issue."
- **Be articulate and concise.** Present the facts in a simple, direct manner. If a reporter's question is unclear, ask for clarification.

- **Maintain boundaries.** Don't over-explain or go off topic. Keep the interview focused on your message.
- **Be engaging.** Vary your voice, pacing, body language, and facial expressions.
- **Prepare quotes or soundbites.** Use colorful statements, compelling phrasing, and active verbs.
- **Speak in personal terms whenever possible.** Using personal anecdotes to illustrate your point is the most effective way to communicate your message.
- **Avoid jargon.** Rotary terms like "district" or "district governor" can be meaningless and confusing to people outside of Rotary, so avoid them. If you have to use Rotary phrases, explain them. Avoid using the term "Rotarians"; instead, use "Rotary club members" or "members of Rotary."
- **Use metaphors and analogies.** Provide comparisons and examples that make facts and figures vivid.
- **Remember that you are never truly "off the record."** Everything you say may be included in the story. Stay in interview mode whenever a reporter is present.
- **Remember your audience.** Make comments that will interest readers or viewers.

TELEVISION INTERVIEWS

- Speak and gesture naturally.
- Use short sentences.
- Talk to the interviewer, not to the camera. Treat the interview as a conversation.
- Keep a positive expression. Smile when appropriate.
- Avoid wearing clothing with busy patterns, which can distract the viewer.



WHEN A CRISIS OCCURS

During times of crisis, handling media inquiries and taking proactive approaches to communicate with the public are crucial for protecting the reputation of the organization. Be ready to respond by following the tips outlined in the Media Crisis Guide, which you can find by going to the [Brand Center](#) and typing “Public Relations Resources” in the search box on the upper right-hand corner of the screen. You can also contact Rotary International Public Relations staff at +1-847-866-3466 or pr@rotary.org for assistance.



RESOURCES

Want sample materials? Go to the [Brand Center](#) and type “Public Relations Resources” in the search box on the upper right-hand corner of the screen. The following templates are available for download:

- News releases
 - Polio immunization trip
 - Outstanding member
 - Fundraising event
 - Service project
- Media advisories
 - Polio fundraiser
 - Events
- Letters to the editor
 - Peace
 - Membership
- Media Crisis Guide

Club, District, and Zone Websites

A website is a great way to share information about your club, district, or zone and the work you're doing to improve people's lives. Use your website to spark people's interest in Rotary and inspire them to learn more and get involved.

These ideas can help you design a website that reflects Rotary's brand and shows your impact in the community and around the world:

- Emphasize your activities. Use images and videos that feature club members actively working together and having fun while making a positive change in your community.
- Keep it simple: People usually scan websites. Using bullet points and clear, direct language will help them see the most important information.
- Feature calls to action. Make it easy for non members to support your club, either through donations, volunteering, or becoming a member. Buttons and other clear calls to action can help.
- Use Rotary's brand colors. Refer to our color palette for color formulas.

Find the template to create your logo on the **Brand Center**.

Your club, district, or zone logo is made up of the Masterbrand Signature plus the club name, or the district or zone number. You can use either the Masterbrand Signature or the simplified version in your club, district, or zone logo on your website.

ELEMENTS OF AN ENGAGING WEBSITE

Logo

Use your club, district, or zone logo at the top of the site. You can also repeat it at the bottom.

Find the template to create your logo on the **Brand Center**.

Images

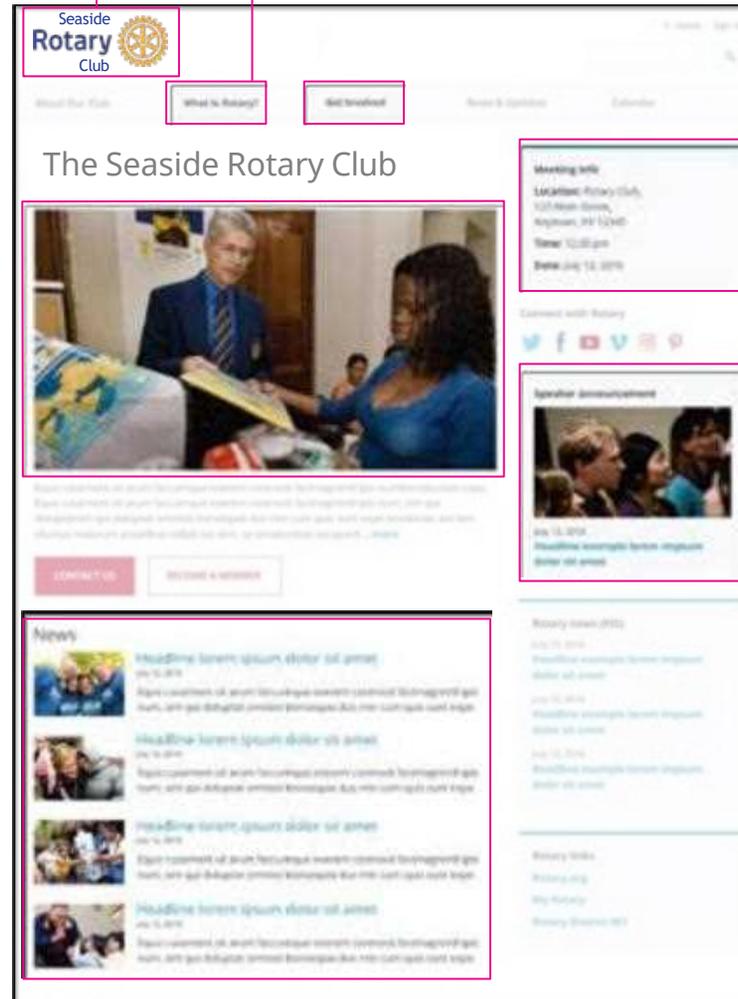
Use photos that tell a story and that focus on relationships and community impact. Whenever possible, they should show more than one Rotary member and reflect our diversity.

Always get written and signed permission from anyone who appears in photos or videos that you use for Rotary purposes.

News & Updates

Tell people about your activities and projects and give them the latest news from your club, district, or zone. Include photos and stories about your work.

To show news about Rotary on your website, use **Rotary's RSS feed**.



What Is Rotary?

Talk about Rotary as an organization that makes a positive impact close to home and around the world. You can give an overview of Rotary, the causes we support, and The Rotary Foundation.

Get Involved

Invite people to volunteer for a project or participate in an activity. Provide information about causes or projects you want to feature.

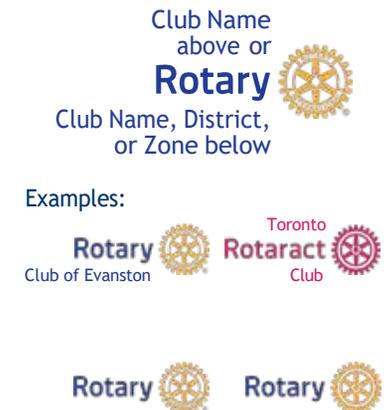
About Your Club, District, or Zone

Include when and where your club, district, or zone meets, how to join, and who to contact for more information. Keep it updated so people can easily find you.

Calendar

Tell people about upcoming events. Include information about speakers, activities, and Rotary events.

Club, District, or Zone Logos



QUICK START GUIDE FOR CLUB SOCIAL MEDIA PAGES



INTRODUCTION

Social media is part of our everyday lives, both personally and professionally. To stay connected with your members and community, you need more than a club website; you need a strong social media presence too.

These guidelines will help you quickly build your social media pages and keep them up-to-date. You'll learn:

- **Which social media platforms are right for you**
- **How to understand your audience**
- **What types of content to post and when**
- **How to develop a social media plan, plus much more**

Use these recommendations as a starting point. Your club will learn what works best for it through experimentation.

THIS GUIDE COVERS THESE TOPICS:

- › **GETTING STARTED WITH SOCIAL MEDIA**
- › **CHOOSING THE RIGHT PLATFORM**
- › **WHY AUDIENCE MATTERS**
- › **CREATING YOUR CONTENT PLAN**
- › **CREATING YOUR PROFILE**
- › **RESOURCES**

THE BENEFITS OF SOCIAL MEDIA

Social media is a way for your club to connect with current and past members, prospective members and donors, and friends. It's also an effective way to increase awareness of your club and its activities in your community.



GETTING STARTED WITH SOCIAL MEDIA

Social media is an extension of your club online so make it a part of your communications toolkit, along with email, newsletters, and your website.

A social media plan will help you determine what you want to achieve, which social media platforms are right for your club, and what you want to communicate to your online community.



STEP 1: SET GOALS AND OBJECTIVES

Focus your efforts by identifying the objectives you want your club to achieve through social media and setting goals that will mark your progress. Keep your goals specific and measurable. Increasing fans and followers is a good objective. One related goal could be to increase followers by 5% from the previous year.

Tip: When you're writing or sharing a post, ask yourself, "Is this helping to reach our goals?"

SAMPLE GOALS

1. Invite email contacts and Facebook friends to like my club page, with a goal of increasing fans by 10%
2. Add a Donate button to my club's Facebook page to promote our fundraising efforts, with a goal of raising \$100
3. Create Facebook events for upcoming club meetings and invite prospective members; increase attendance by 10%
4. Calculate how many donations my page gets through Facebook each month to set a benchmark to inform goal setting

STEP 2: START SMALL

You don't need to create an account on every social media network. Start small and focus your efforts. To decide which platform is right for you:

1. Research the social media networks that are used most widely in your community.
2. Think about who you want to reach and where those people are spending their social media time.
3. Understand the commitment involved. Who can manage your social media presence, and how much time can this person or group dedicate to it?

RECOMMENDED POSTING SCHEDULE

Plan for one hour daily to:

- Find and post content
- Monitor your pages for questions and comments
- Connect with fans and followers online (reply, like, and share relevant posts)

STEP 3: POST CONSISTENTLY

As you learn more about your fans and followers, you'll grow more confident about what types of content resonate with them. You can cultivate your social media fan base by commenting on followers' posts and responding to their messages.

If your club can maintain consistent quality and responsiveness, you'll win over your followers.

Tip: A content calendar will help you commit to a weekly routine. More information on creating a calendar to come.

CHOOSING THE RIGHT PLATFORM:

FACEBOOK

DEMOGRAPHICS

- 2 billion users
- Mostly ages 18-54
- Reaches over 50% of all internet users worldwide and 79% in the U.S.

TOP CONTENT TYPES

- Videos
- Photos
- News
- Events

BEST FOR

- Building relationships
- Communicating with prospective members and the local community
- Reaching members who are already using social media
- Establishing a presence on the most popular and widely used social networks

CHALLENGE

- Limited reach without paid advertising (you'll learn more about paid advertising later in this presentation)



CHOOSING THE RIGHT PLATFORM:

TWITTER

DEMOGRAPHICS

- 330 million users
- Mostly ages 18-49
- 79% of users are outside the United States; the U.S. has the most users, followed by Brazil, Japan, and Mexico

TOP CONTENT TYPES

- News
- Videos
- Photos

BEST FOR

- Building your online community
- Promoting your club and its events locally
- Connecting with a global audience
- Finding new partners

CHALLENGE

- 280-character limit per tweet (includes punctuation, links, and hashtags)



CHOOSING THE RIGHT PLATFORM:

INSTAGRAM

DEMOGRAPHICS

- 800 million users
- Mostly ages 18-34
- More female than male users
- 80% of users are outside the United States; the U.S. has the most Instagram users, followed by Russia, Brazil, Turkey, and the United Kingdom

TOP CONTENT TYPES

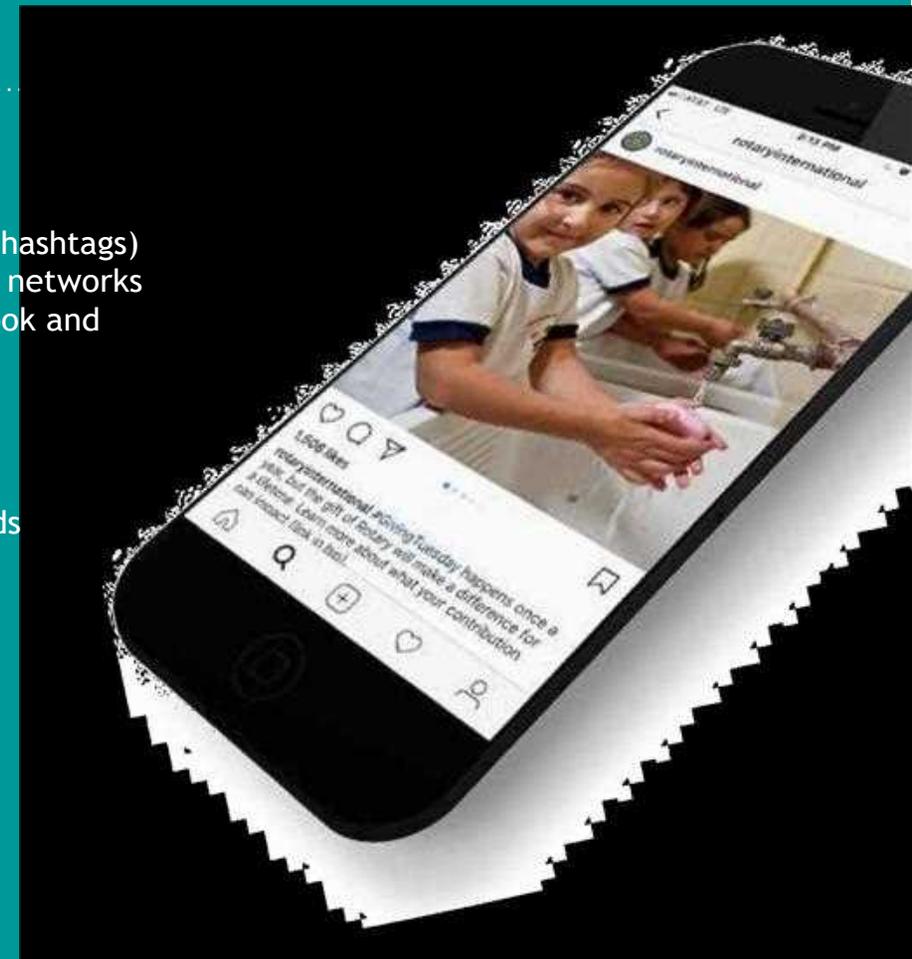
- Photos
- Videos

BEST FOR

- Building relationships
- Searching for topics (using hashtags)
- Feeding other social media networks (can share posts to Facebook and Twitter)

CHALLENGES

- Limited scheduling tools
- Videos limited to 60 seconds



CHOOSING THE RIGHT PLATFORM:

OTHER SOCIAL MEDIA NETWORKS

LinkedIn

- Demographics: 530 million users; mostly ages 30-54
- Top content types: news and feature stories; conversation
- Best for: business development; business-to-business communication
- Challenge: limited interactions

Google+

- Demographics: 200 million users; mostly ages 24-34; 67% male
- Top content types: news and feature stories
- Best for: search engine optimization (SEO); technology and design businesses
- Challenge: not widely used

YouTube

- Demographics: 1 billion users, all ages
- Top content types: how-to and entertainment videos
- Best for: brand awareness
- Challenge: labor-intensive

SPEAKING ENGAGEMENTS

Don't miss an opportunity to speak to your community about your club and what Rotary has accomplished around the world. Remember these tips when you plan your presentation:

- Be sure to use up-to-date visual branding in your presentation. [Get our Rotary-branded PowerPoint template.](#)
- Speak about all the ways your club is committed to making a difference in your community. Show and tell the story of how you're taking action to create positive change.
- Use engaging, interesting, high quality photos or video. [Download professionally produced photographs and video to use in your presentation.](#)
- Do your research. Whether your focus is fundraising, polio eradication, or projects your club did last year, be prepared with facts and figures that help tell your story.
- End with a call to action. Do you want the audience members to join your club? Or make a donation? Be clear about the next steps you want the audience to take.
- Tell them how they can contact you. Make sure they know how to find your club's website and when and where your club meets. Hand out your Rotary or Rotaract business card so attendees can contact you if they have questions.

IDEAS FOR SPEAKING EVENTS

Give a presentation in the community.

Attend a meeting or event of another group and give a presentation about your Rotary or Rotaract club. Bring membership and other club materials for attendees. Invite interested community members to your next meeting.

Be a guest speaker at another club or organization.

Talk to professionals, representatives of local companies, and community activists and leaders. Discuss your area of expertise in service and the kinds of projects your club does. Doing so will raise your club's profile among other community influencers, potentially leading to long-term partnerships.

Participate in a panel discussion.

Take part in discussions about local issues at events, conferences, or schools. Join panel discussions that include representatives from community organizations, academic or professional experts, politicians and civic leaders, and Rotary and Rotaract members. This will help position you as a leader and expert in the eyes of your community.

RESOURCES AND REFERENCE

[Learn how to help Rotary stand out from other organizations with a compelling, consistent message.](#)

[Learn how Rotary's alliance with Toastmasters International can improve your communication and speaking skills.](#)

[Find courses and resources from staff and members in the Learning Center.](#)

Your Logos at a Glance

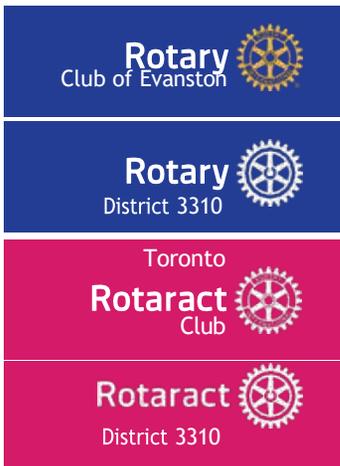
A consistent voice and visual identity are essential components of a strong brand. By using the design elements in this guide you ensure that our brand is presented in a unified way, helping to build awareness and recognition of Rotary and Rotaract. You can find more information on the Brand Center at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

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

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

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

Reverse Options



CLUB, DISTRICT, OR ZONE LOGOS

Masterbrand Signature

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



Examples

Rotary
Club of Evanston



Rotary
District 3310



Masterbrand Signature Simplified

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



Sunrise Kampala
Rotary
Club



Rotary
Zone 8



Rotaract Masterbrand Signature

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



Examples

Rotaract
Club of University
of Chicago



Rotaract
District 3310



Rotaract Masterbrand Signature Simplified

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



Toronto
Rotaract
Club
Rotaract
Zone 8



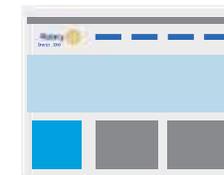

Layout Examples



club brochure



flyer



website



facebook*

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



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

Your Logos at a Glance

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

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

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

RESOURCES

BRAND CENTER:
rotary.org/brandcenter

LEARNING CENTER:
rotary.org/learn

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

SUPPORT CENTER:
rotarysupportcenter@rotary.org

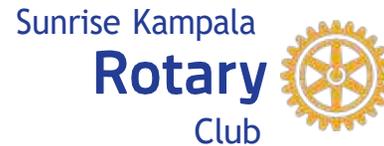
CHECKLIST

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

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

LOCKUPS

Logo Lockup Examples



Word Lockup Examples



Let's Fight Against Hunger

Taste of Evanston



NAMING PROJECTS OR EVENTS

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

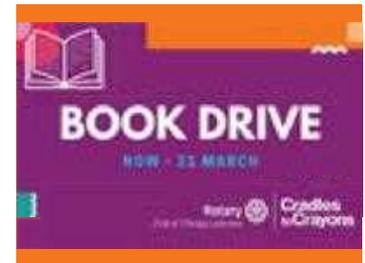


Club logo on installation



Rotaract club event

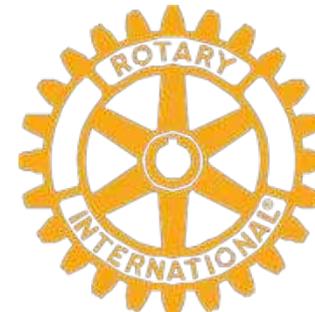
Multiclub sign



Rotary club event

MARK OF EXCELLENCE

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



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

HOW TO ADD A PROJECT TO ROTARY SHOWCASE

my.rotary.org/showcase



1



To add your project, sign in to My Rotary and under **Take Action**, click **Rotary Showcase**.

2



Click **ADD A NEW PROJECT**.

3

Enter information about your project.

4

Select one or more categories, and *one* primary area of focus.

When you click **Save** your project is published immediately.

Identify your Rotary, Rotaract and Rotary Community Corps club partners.

Add members of your partner clubs as project contacts.

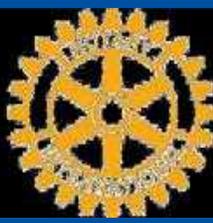
Upload up to 10 images and links to YouTube videos.

Add your project's contributions to measure Rotary's global engagement.

The screenshot shows a web form for creating a project. It includes sections for: 'Project category' with radio buttons for 'Community', 'International', 'Youth', 'New Generations', 'Area of Focus', 'Fundraising', 'Peace', 'Environment', and 'Special Resource'; 'Partners' with a green 'Add' button; 'Project contacts' with a green 'Add' button; 'Related Links' with a green 'Add' button; 'Tags' with a green 'Add' button; 'Funding' with radio buttons for 'Club Foundation', 'Public Image Grant', 'Rotary Grant', and 'Other' with input fields; 'PROJECT PHOTOS AND VIDEOS' with a green 'Add' button; 'ENGAGEMENT TRACKER' with a green 'Add' button; and a 'Partner' table with columns for 'Partner', 'Total volunteer hours', 'Number of volunteers', and 'Cash contribution (USD)'. The table has a dropdown menu for 'SELECT' and input fields for the other columns.

5

Need more Rotary Showcase resources?
Contact us at
RotarySupportCenter@rotary.org.



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

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 & Rotary Club Central

Watch for Public Image
Training Opportunities !

Rotary



| 2023 Lone Star PETS

SUPPLEMENTAL RESOURCES

MODULE C-8

*Moving Your Rotary
Club Forward*

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 "off-site" 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.

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, 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. 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 beneficiaries³¹⁴ 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 the 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. Flexibility allows each club 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.

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

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

Club type	Description	Appeals to	Charter member minimum
Rotary club	Professionals and other leaders who meet regularly for service, connection, and personal growth Read about a successful Rotary club.	People who are looking for friendship and service opportunities Learn more in the Starting a Club online course.	20 required
Rotaract club	Adults who take action through community and international service, learn leadership skills, and develop professionally Read about a successful Rotaract club.	People, especially younger professionals and university students who want to develop leadership skills, find innovative solutions to pressing issues, and have fun through service Learn more in the Rotaract Handbook .	12 recommended
Satellite club	A section of a Rotary or Rotaract club that has its own meetings, projects, bylaws, and board, run in collaboration with its sponsor club Read about a successful satellite club.	Those who want a club experience or a meeting format or time other than what's offered by other clubs in the area but also appreciate the support and partnership of another club Learn more in the Guide to Satellite Clubs .	8 for a satellite Rotary club; no minimum for a satellite Rotaract club

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

Meeting format	Description	Appeals to
In person	A club that meets in person	Those who consider face-to-face interactions an important part of the meeting experience or who aren't comfortable with or don't enjoy online meetings
Online	A club that meets primarily online Read about a successful club that meets online.	People who travel frequently, have circumstances that make it difficult to meet in person, or prefer an online experience Learn more about online club meetings .
In person and online	A club that holds some meetings in person and others online, or one that holds in-person meetings that some members attend virtually Read about a successful club that meets in person and online.	Those who have various needs or who want a mix of experiences

CLUB MODEL: Finally, determine the approach or elements your club will offer. You can choose a model below or design your own.

Club model	Description	Appeals to
Traditional	<p>The traditional club experience includes having a meal, hosting a speaker, and practicing traditions that members value; traditional clubs often have higher dues because of venue and meal costs</p> <p>Read about a successful traditional club.</p>	<p>People who want to socialize over a meal while learning about a new topic or an opportunity to serve the community</p>
Passport	<p>A club that allows members to attend other club meetings frequently as long as they attend a specified number of its own meetings each year</p> <p>Read about a successful passport club.</p>	<p>People who travel frequently or who enjoy trying a variety of club experiences and meeting lots of people</p> <p>Learn more in the Guide to Passport Clubs.</p>
Corporate	<p>A club whose members (or most of them) work for the same employer</p> <p>Read about a successful corporate club.</p>	<p>Employees of one organization who want to do good in their community</p>
Cause-based	<p>A club whose members are passionate about a particular cause and focus their service efforts in that area</p> <p>Read about a successful cause-based club.</p>	<p>People who want to connect with others while addressing a particular set of problems</p>
Alumni-based	<p>A club in which a majority of members (or a majority of charter members) are former Rotary program participants, or former Rotaractors or Rotarians</p> <p>Read about a successful alumni-based club.</p>	<p>People who have participated in Rotary</p>
Interest-based	<p>A club that focuses on a particular interest or hobby</p> <p>Read about a successful interest-based club.</p>	<p>People who want to enjoy Rotary in a specific way or focus on a shared interest or activity, such as professional development for members</p>
International	<p>A club whose members are expatriates or who speak a common language other than the primary language of their district, or an online club whose members are from different countries</p> <p>Read about a successful international club.</p>	<p>Expatriates who want to connect with each other using a common language, or those who want to connect with people from all over the world or want other international experiences from their club meetings</p>

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.

A Model for Change Planning

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:



At Rotary, we're committed to treating everyone with dignity and respect, allowing everyone's voice to be heard, and providing equitable opportunities for fellowship, service, and leadership.

Our members want and expect Rotary to be a diverse, equitable, and inclusive organization. We're committed to creating supportive environments that foster open communication and shared learning. And although the Rotary experience may differ from country to country, the dynamics, histories, and structures that create inequality and bias can be found all over the world. Issues of diversity, equity, and inclusion are globally relevant.

The Rotary International Board of Directors and The Rotary Foundation Board of Trustees embrace the principles of diversity, equity, and inclusion, and Rotary is taking action to follow these principles in everything we do. We recognize that being a diverse, equitable, and inclusive organization will enhance the experience that members have in Rotary, allow us to carry out more meaningful and effective service efforts, and create open, welcoming environments that appeal to people who want to connect with us.

A guide for the future

The Rotary International Board convened the [Diversity, Equity, and Inclusion Task Force](#) to assess the state of DEI within Rotary and develop a comprehensive plan to establish these values even more firmly in our culture. To develop the plan, the task force used the responses from 31,000 members around the world who reported their experiences with DEI in Rotary through our first diversity, equity, and inclusion survey.

[Read](#) the highlights of the framework.

[View a snapshot of DEI at Rotary.](#)

Rotary's commitment statement

In 2021, the Rotary International Board, with guidance from the DEI Task Force, strengthened our [commitment statement](#) on diversity, equity, and inclusion, which had been adopted in 2019.

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DEI code of conduct

Rotary International's Board approved a new [DEI code of conduct](#) that reflects our core values. It provides a supportive framework for how Rotary members can create and maintain an environment that is collaborative, positive, and healthy for everyone.

The DEI code of conduct asks Rotary members to:

- Use respectful language
- Be supportive
- Foster a welcoming and inclusive environment
- Celebrate diversity

Although free expression is important, what we say and how we behave matter. Rotary does not tolerate speech or behavior that promotes bias, discrimination, prejudice, or hatred because of age, ethnicity, race, color, disabilities, religion, socioeconomic status, culture, sex, sexual orientation, or gender identity.

All Rotary leaders, from club presidents and district governors to directors and trustees, are expected to apply the DEI code of conduct uniformly by taking responsibility for how their words and actions may affect others.

If you hear something or observe behavior that doesn't align with the DEI code of conduct, you have several options for addressing it:

- If the situation can be resolved through discussion, encourage the member or participant to talk to the person directly. Very often, a person who said something or acted in a way that made others feel excluded, marginalized, or targeted did not do so intentionally. Although there might be mistakes, missteps, and uncomfortable conversations along the way, the end result is a better, stronger Rotary.
- If a discussion is not possible or the situation involves someone in a leadership role or another club, contact [Club and District Support staff](#), who will review the information and follow up appropriately.
- If anyone is in danger or their safety is in doubt, contact local law enforcement and notify Rotary's [Club and District Support staff](#).

Support DEI in your club and community

You have access to many resources to help you advocate for DEI in your club and district. You can:

- Expand your knowledge and increase your ability to facilitate positive discussions about DEI issues with courses available in the Learning Center:
 - [DEI Basics](#)
 - [DEI Intermediate](#)
 - [DEI Webinar Series](#)
- Talk about the benefits of a diverse and inclusive club with your fellow club members and use the [Diversifying Your Club](#) assessment to create a member diversity and inclusion plan.
- Join a [Rotary discussion group](#) about a DEI-related topic:
 - [LGBT Diversity and Inclusion Affinity Rotary Group](#)
 - [Gender Equity in Rotary](#)
 - [DEI — Diversity, Equity, and Inclusion](#)
 - [Celebrating Indigenous and Various Cultures, Peoples, and Places](#)
 - [Rotarians Against Racism](#)
 - [Agrupación Feminista de Rotary](#) (Spanish)

You can take action to promote diversity, equity, and inclusion in your club:

- Invite local diversity, equity, and inclusion experts to speak to your club. Connect with organizations that support DEI efforts, and work with them on projects or events.
- Seek out new voices when you're making appointments and encourage people who have been underrepresented in these roles to take on leadership positions.
- Hold conversations about diversity, equity, and inclusion. Acknowledge that this can be uncomfortable and very personal. Establish the expectation that these conversations will allow everyone opportunities to learn and to be heard and will remain respectful.
- Create a club DEI committee that reflects the demographics of your community and works with residents to identify collaborative learning, sharing, and service opportunities.

A 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.
- 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.

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.



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

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 found to be under-represented 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](#)



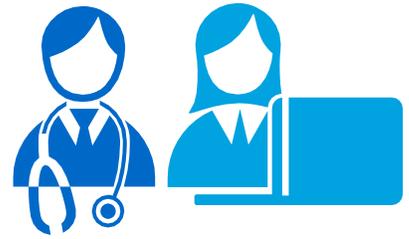
MEMBER DIVERSITY WORKSHEET

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. Do these 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.

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.



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.

Interested in 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. _____	%

ACTION PLAN

Use your findings to create an action plan that addresses your club's professional diversity.

Action	Person responsible	Time frame	Resources needed