

# Lone Star P.E.T.S. 2025

## PRESIDENTS-ELECT WORKBOOK

SATURDAY, FEBRUARY 28, 2025

### MODULE B-5 REACHING OUT THROUGH SERVICE

#### **GOAL**

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

#### OBJECTIVES

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

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

#### REFERENCE MATERIALS

Community Assessment Tools: A Resource For Rotary Projects

## Icebreaker and Midway Review Questions:

### Icebreaker

Implement an Icebreaker, with each participant sharing the following points:

- 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

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

1. Give participants a couple of minutes to jot down action ideas on the notes page at the end of this module.
2. Any other question(s) or comments?



## Module B-5: Reaching Out Through Service

### Breakout Discussion Questions

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

# 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, **provided in Module A-1, provided** 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.

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

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

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

## CONTACTING OTHER ROTARY CLUBS

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

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

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

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

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

## What makes a service project effective?

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

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

# Project Lifecycle Resources

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

## Planning & organizing

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

### Leverage your district's local expertise

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

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

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

### Exchange ideas in the online community

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

### Conduct a community assessment

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

### Set service goals

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

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

### **Create a project plan**

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

## **Acquiring resources**

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

### **Promote your project**

Post your project on [Service Project Center](#) to raise awareness for your project within the Rotary Community. Service Project Center 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**

[Service Project Center](#), 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 Service Project](#)
  - [Center How to join a discussion group](#)
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# 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.

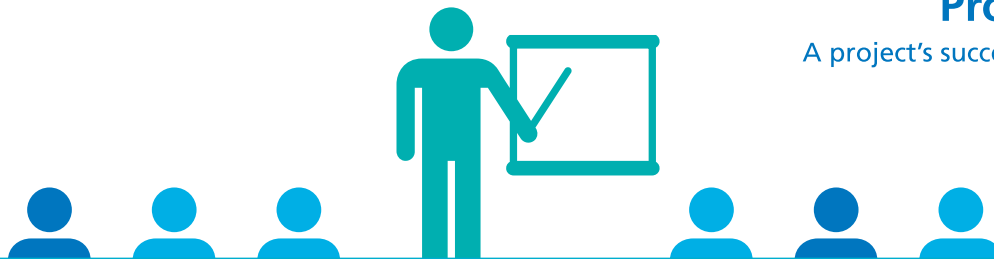
## Encourage local ownership

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



“ 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.

### Service Project Center

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.



“ 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.



# SERVICE PROJECT CENTER (SPC): FREQUENTLY ASKED QUESTIONS

The Service Project Center (formerly Rotary Showcase) is a dynamic and feature-rich hub for all Rotary service projects. This new online tool is part of our ongoing efforts to enhance participant experience and increase our impact.

## 1. Who can access the Service Project Center?

Anyone can search or view service projects on SPC.

## 2. How do members find the Service Project Center on My Rotary?

Once logged in, members can navigate to SPC through 3 different ways:

### 1. My Rotary landing page

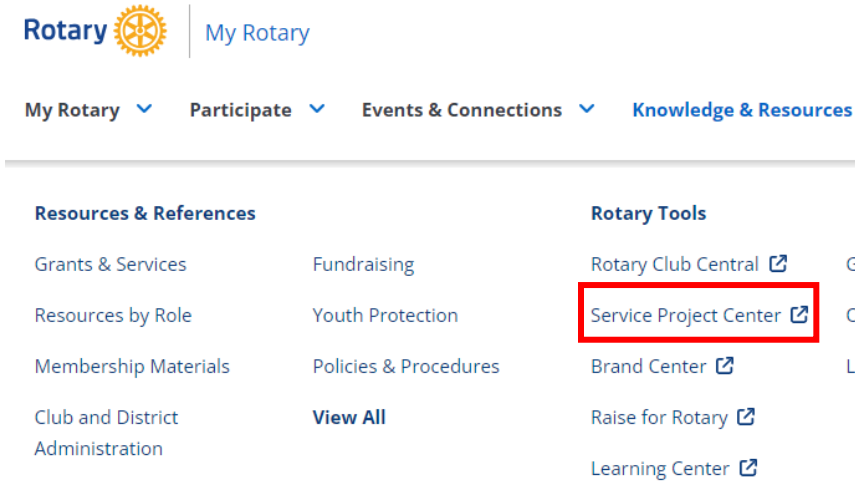
<p><b>Rotary Club Central »</b></p> <p>Set club goals and track how you're doing. Monitor your progress with detailed reports.</p>	<p><b>Grant Center »</b></p> <p>Launch and manage all your Rotary Foundation grants in one place.</p>	<p><b>Membership and Foundation Reports »</b></p> <p>Find reports with data about membership, contributions, recognition, and more.</p>
<p><b>Brand Center »</b></p> <p>Find logos, photos, videos, and all the resources you need to promote Rotary in your community.</p>	<p><b>Learning Center »</b></p> <p>Learn new skills with online classes and materials created for your specific role or interests.</p>	<p><b>Service Project Center »</b></p> <p>Browse successful club projects from around the world.</p>

### 2. Under *Participate*

The screenshot shows the 'My Rotary' navigation menu. The 'Participate' tab is active. Under the 'Participate' dropdown, the 'Service Project Center' link is highlighted with a red box. The menu structure is as follows:

- My Rotary ▾
- Participate ▲
  - Programs
    - Rotary Action Groups
    - Rotary Fellowships [↗](#)
    - Rotary Community Corps [↗](#)
    - Rotary Friendship Exchanges [↗](#)
    - Interact [↗](#)
  - Grants
    - Grant Center [↗](#)
    - District Grants
    - Global Grants
    - Programs of Scale
    - Disaster Response Grants
  - Projects
    - Developing Projects
    - The Cadre
    - Service Project Center [↗](#)
  - Start a Club
- Events & Connections ▾
- Knowledge & Resou

### 3. Under *Knowledge & Resources*



### 3. Who can add service projects?

Any active Rotary or Rotaract member and Rotary executive secretaries with a My Rotary account can post projects in the Service Project Center.

### 4. How long does it take to enter a project?

Not long at all. Though members are encouraged to share a full description of what went into planning and executing their service project, only the mandatory fields marked with an asterisk need to be filled to publish the project.

### 5. If I begin to add a project, can I save a draft to publish later?

Project drafts cannot be saved in SPC. However, if you complete the required fields (which are marked with an asterisk) and post the project, you can edit the project to add more information later.

### 6. Do service projects have to be complete to be added?

No, SPC accepts proposed projects, projects in progress, and completed projects.

Please note:

- Be sure to return to SPC to update proposed projects or projects in progress.
- To earn the goal achievement for your club's "service projects" goal in Rotary Club Central, the projects enter in SPC must be marked as complete; also, the project end date determines the program year it will be counted toward.

### 7. After a service project is added, how soon does it appear in SPC?

Once a project is entered and published, it will immediately appear in Service Project Center.



## 8. Who can manage service projects published on SPC?

The member who posted the project, members added as project contacts, and current club officers can edit, copy, or delete project information.

### Project Details



## 9. My club has the same service project we host every year. Can I copy the project, or do I have to re-enter all the project information again?

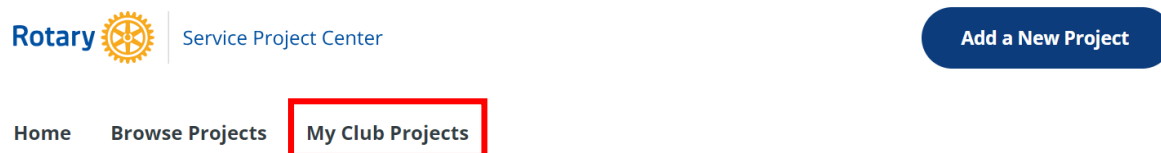
Current club officers and project contacts for the project posted have access to make a copy of the project. Some information such as timeline and funding will need to be updated.

### Project Details



## 10. How do I find my club's projects?

To view or search for your club's service projects posted on the SPC, click on My Club Projects at the top of the page.



## 11. How can I report service projects to earn achievements for my club's "service projects" goal in Rotary Club Central?

To earn service project goal achievements in Rotary Club Central for the current program year, completed service projects must be added to the Service Project Center before 30 June. Achievements for a club's service project goals will appear in Rotary Club Central 24 hours after projects are entered on the SPC.

Please note that to earn the goal achievement, the project must be marked as complete; also, the project end date determines the program year it will be counted toward. For example, a service project starting on 15 June 2024 and ending 15 September 2024 will be counted toward the 2024-2025 Rotary program year achievements in Rotary Club Central.

## 12. If I had added service projects to Rotary Showcase, will it appear in the Service Project Center?

Yes, all service project information added to Showcase will be visible in SPC.

**13. Can I add any of my club’s projects and activities to the Service Project Center?**

Only service projects should be added to Service Project Center.

**14. Why do I see service projects posted in multiple languages?**

Service projects are posted on SPC in the language determined by the member adding the project.

**15. What is a project contact?**

The member who published the service project on the Service Project Center is a project contact, and any contacts added to the project are also project contacts. Project contacts have access to edit, copy, or delete the project and may be emailed by people viewing the project on SPC. Please note that member contact information, such as email, and is kept private on SPC and follows [Rotary’s Privacy Policy](#).

**16. Can I add a service project from my smart phone?**

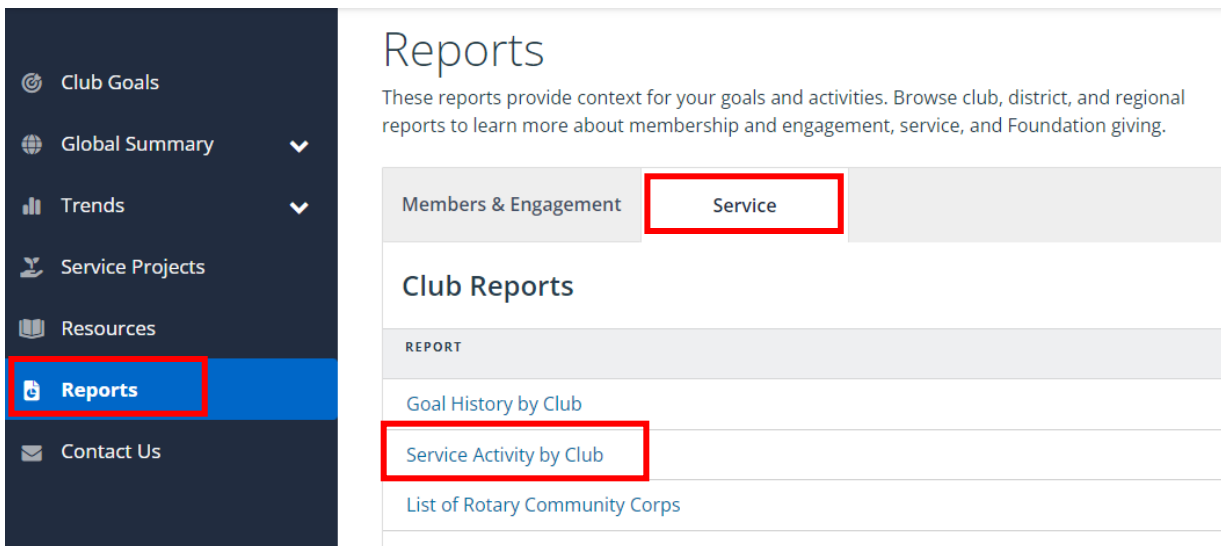
Yes, the Service Project Center is mobile-friendly. Projects can be added by computer, tablet, and phone.

**17. Can I find another Rotary or Rotaract club to partner with on a service project?**

Yes. Your club can either post a proposed project or seek proposed projects already in SPC.

**18. Can members run a report of their service projects?**

Yes, a report is available on Rotary Club Central.





# Lone Star P.E.T.S. 2025

## PRESIDENTS-ELECT WORKBOOK

SATURDAY, MARCH 1, 2025

### MODULE B-6

### BUILDING SUCCESSFUL FUNDRAISING STRATEGIES

#### **GOAL**

**Club Presidents will possess knowledge and insight about how to lead their respective clubs in effective fundraising strategies.**

#### OBJECTIVES

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

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

#### REFERENCE MATERIAL:

Planning Fundraising Events

Signature Projects

Event Planning Guide

## Module B-6: Building Successful Fundraising Strategies

### Breakout Discussion Questions

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

# 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](http://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.



# 3

## ASSESS YOUR RESOURCES

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

TIME FRAME	TASKS
<input data-bbox="165 562 233 630" type="checkbox"/> 24-18 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Identify the event's goals</li> <li><input type="checkbox"/> Create an event plan that covers topic, audience, speakers, sponsors, promotional plan, venue, risk management</li> <li><input type="checkbox"/> Build a team and assign roles</li> <li><input type="checkbox"/> Contract with the event venue</li> <li><input type="checkbox"/> Develop a budget</li> <li><input type="checkbox"/> Review possible contingencies (e.g., for outdoor events, develop a plan in case of inclement weather)</li> <li><input type="checkbox"/> Review insurance coverage for the event and contact your insurance provider</li> <li><input type="checkbox"/> Get tax and legal advice; hosting exhibits, sponsoring events, or accepting sponsorships may have tax and legal consequences for your club</li> <li><input type="checkbox"/> Develop a request for proposal to get vendor bids</li> </ul>
<input data-bbox="165 1272 233 1339" type="checkbox"/> 18-12 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Confirm speakers and rehearsal times</li> <li><input type="checkbox"/> Find sponsors</li> <li><input type="checkbox"/> Find exhibitors</li> <li><input type="checkbox"/> Get vendor bids (for meeting and event services, graphics, printing, audiovisuals, catering, music, photography, security, etc.)</li> <li><input type="checkbox"/> Analyze the bids and select service providers</li> <li><input type="checkbox"/> Negotiate contracts, including payment terms and service delivery</li> <li><input type="checkbox"/> Set deposit due dates</li> <li><input type="checkbox"/> Develop a registration system; include a question about dietary restrictions if applicable</li> <li><input type="checkbox"/> Obtain public performance licensing rights for music, etc.</li> <li><input type="checkbox"/> Confirm entertainment and any rehearsal or sound check times</li> </ul>

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



TIME FRAME	TASKS
<div data-bbox="165 170 233 237" style="border: 1px solid black; width: 42px; height: 32px; margin-bottom: 10px;"></div> 6-4 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send email reminder to event invite list; suggested topics:               <ul style="list-style-type: none"> <li>- Registration reminder</li> <li>- Latest program developments</li> <li>- Logistic information</li> <li>- Share with a friend</li> </ul> </li> <li><input type="checkbox"/> Get speakers' presentations</li> <li><input type="checkbox"/> Develop the presentation on Rotary and your club</li> <li><input type="checkbox"/> Continue promoting the event</li> <li><input type="checkbox"/> Select menus, if applicable</li> <li><input type="checkbox"/> Train volunteers</li> <li><input type="checkbox"/> Refine the floor plan</li> <li><input type="checkbox"/> Refine the detailed schedule</li> <li><input type="checkbox"/> Make a delivery and storage plan for event materials (e.g., printed materials, sponsor items, badges, displays, etc.)</li> <li><input type="checkbox"/> Open event registration</li> </ul>
<div data-bbox="165 1031 233 1098" style="border: 1px solid black; width: 42px; height: 32px; margin-bottom: 10px;"></div> 2 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send email reminder to event invite list; suggested topics:               <ul style="list-style-type: none"> <li>- Registration reminder</li> <li>- Latest program developments</li> <li>- Logistic information</li> <li>- Share with a friend</li> </ul> </li> <li><input type="checkbox"/> Finalize floor plan</li> <li><input type="checkbox"/> Finalize the detailed schedule</li> <li><input type="checkbox"/> Develop a detailed list of desired photos for the photographer</li> <li><input type="checkbox"/> Reconfirm all speakers, vendors, and logistics</li> <li><input type="checkbox"/> Give final floor plan and the detailed schedule to the event venue and key stakeholders</li> </ul>



TIME FRAME	TASKS
<input data-bbox="167 170 233 237" 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="167 621 233 688" 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](mailto:pr@rotary.org). You can also share your event's success by visiting [www.rotary.org/rotarystory](http://www.rotary.org/rotarystory) and posting images or video. Add [#rotarystory](https://www.instagram.com/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.



# 5

## EVENT RESOURCES

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

### OFFICIAL LOGOS



Masterbrand Signature

Mark of Excellence

### CLUB BROCHURE TEMPLATE



### 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
- + Event promotion examples listed in the brand guidelines (posters, cards, digital assets)

? If you need help getting started, or get stuck planning, we're here to assist. Email [pr@rotary.org](mailto:pr@rotary.org).

